

Public Document Pack

To: Members of the Cabinet

Notice of a Meeting of the Cabinet

Tuesday, 22 June 2010 at 12.30 pm

County Hall, Oxford, OX11ND



Joanna Simons
Chief Executive

June 2010

Contact Officer: **Sue Whitehead** Tel: (01865) 810262; E-Mail:
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<i>Councillors</i>	Membership
Keith R. Mitchell CBE	- <i>Leader</i>
David Robertson	- <i>Deputy Leader</i>
Arash Fatemian	- <i>Cabinet Member for Adult Services</i>
Ian Hudspeth	- <i>Cabinet Member for Growth & Infrastructure</i>
Jim Couchman	- <i>Cabinet Member for Finance & Property</i>
Kieron Mallon	- <i>Cabinet Member for Police & Policy Co-Ordination</i>
Louise Chapman	- <i>Cabinet Member for Children, Young People & Families</i>
Michael Waive	- <i>Cabinet Member for Schools Improvement</i>
Rodney Rose	- <i>Cabinet Member for Transport</i>
Mrs J. Heathcoat	- <i>Cabinet Member for Safer & Stronger Communities</i>

The Agenda is attached. Decisions taken at the meeting will become effective at the end of the working day on 30 June 2010 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: 20 July 2010

Declarations of Interest

This note briefly summarises the position on interests which you must declare at the meeting. Please refer to the Members' Code of Conduct in Part 9.1 of the Constitution for a fuller description.

The duty to declare ...

You must always declare any "personal interest" in a matter under consideration, i.e. where the matter affects (either positively or negatively):

- (i) any of the financial and other interests which you are required to notify for inclusion in the statutory Register of Members' Interests; or
- (ii) your own well-being or financial position or that of any member of your family or any person with whom you have a close association more than it would affect other people in the County.

Whose interests are included ...

"Member of your family" in (ii) above includes spouses and partners and other relatives' spouses and partners, and extends to the employment and investment interests of relatives and friends and their involvement in other bodies of various descriptions. For a full list of what "relative" covers, please see the Code of Conduct.

When and what to declare ...

The best time to make any declaration is under the agenda item "Declarations of Interest". Under the Code you must declare not later than at the start of the item concerned or (if different) as soon as the interest "becomes apparent".

In making a declaration you must state the nature of the interest.

Taking part if you have an interest ...

Having made a declaration you may still take part in the debate and vote on the matter unless your personal interest is also a "prejudicial" interest.

"Prejudicial" interests ...

A prejudicial interest is one which a member of the public knowing the relevant facts would think so significant as to be likely to affect your judgment of the public interest.

What to do if your interest is prejudicial ...

If you have a prejudicial interest in any matter under consideration, you may remain in the room but only for the purpose of making representations, answering questions or giving evidence relating to the matter under consideration, provided that the public are also allowed to attend the meeting for the same purpose, whether under a statutory right or otherwise.

Exceptions ...

There are a few circumstances where you may regard yourself as not having a prejudicial interest or may participate even though you may have one. These, together with other rules about participation in the case of a prejudicial interest, are set out in paragraphs 10 – 12 of the Code.

Seeking Advice ...

It is your responsibility to decide whether any of these provisions apply to you in particular circumstances, but you may wish to seek the advice of the Monitoring Officer before the meeting.

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 - 8)

To confirm the minutes of the meeting held on 18 May 2010 (**CA3**) and to receive for information any matters arising therefrom.

4. Questions from County Councillors

Any county councillor may, by giving notice to the Proper Officer by 9 am on the working day 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. Provisional 2009/10 Revenue and Capital Outturn (Pages 9 - 106)

Cabinet Member: Leader

Forward Plan Ref: 2010/014

Contact: Lorna Baxter, Assistant Head of Finance (Corporate Finance) Tel: (01865) 323971

Report by Assistant Chief Executive & Chief Finance Officer (**CA6**).

This report presents the provisional revenue and capital outturn for 2009/10, identifies and explains how actual expenditure and income for the year compares to the

budgeted position, and includes proposals for the allocation of revenue carry forwards in 2010/11. Figures shown in the report reflect those included in the Council's Statement of Accounts for 2009/10 which will be submitted to Audit Committee on 30 June 2010, prior to audit. However, for reporting and presentational purposes some figures may vary.

The Cabinet is RECOMMENDED to:

- (a) ***note the provisional revenue and capital outturn set out in the report;***
- (b) ***approve the carry-forwards and virements as set out in Annex 2;***
- (c) ***recommend Council to approve the virements greater than £0.5m for Children, Young People & Families and Social & Community Services Directorates as set out in Annex 2b;***
- (d) ***approve the changes to balances as set out in the table at paragraph 122;***
- (e) ***agree that the surplus in the On-Street Parking Account at the end of the 2009/10 financial year, so far as not applied to particular eligible purposes in accordance with Section 55(4) of the Road Traffic Regulation Act 1984, be carried forward in the account to the 2010/11 financial year (paragraph 137); and***
- (f) ***approve the creation of new reserves as set out in Annex 4 and paragraphs 125, 135, 136, 140 and 144.***

7. Financial Monitoring - June 2010 (Pages 107 - 138)

Cabinet Member: Leader
Forward Plan Ref: 2010/2011
Contact: Kathy Wilcox, Principal Financial Manager Tel: (01865) 323981

Report By: Assistant Chief Executive & Chief Finance Officer (CA7)

This is the first financial monitoring report for the 2010/11 financial year and covers the period up to the end of April 2010 for both revenue and capital budgets. Since it is difficult to forecast the year-end outturn based on a single month of expenditure and income the report focuses on key risk areas and areas of emerging pressures identified by Directorates, along with plans to manage these.

The Cabinet is RECOMMENDED to:

- (a) ***note the report;***
- (b) ***approve the virement requests as set out in Annex 1a;***
- (c) ***approve the transfer of £0.087m from the Carry Forward Reserve to the Efficiency Savings Reserve and the release of £0.020m to Social & Community Services as set out in paragraphs 57 and 58;***

- (d) **approve the transfer of £1.4m Council funding not required for Personal Care at Home to the Efficiencies Reserve as set out in paragraph 15.**

8. Performance Management: 4th Quarter Progress Report Against Priorities and Targets (Pages 139 - 182)

Cabinet Member: Leader & Deputy Leader
Forward Plan Ref: 2010/013
Contact: Alexandra Bailey, Corporate Performance and Review Manager
Tel: (01865) 816384

Report By: County Council Management Team (**CA8**)

The report shows the council's performance in the four key areas of: customer, projects, finance, and people. Progress against targets is shown by directorate, including a summary of what is going well, what needs to develop, and what requires attention. This is the performance report for Q4 2009/2010.

The Cabinet is RECOMMENDED to note this report.

9. Director of Public Health Annual Report (Pages 183 - 240)

Cabinet Member: Leader
Forward Plan Ref: 2010/004
Contact: Jonathan McWilliam, Director of Public Health Tel: (01865) 336707

Report by Director of Public Health (**CA9**).

This is the fourth Annual Report by a Director of Public Health for Oxfordshire (jointly appointed by the NHS and the County Council). The recommendations are made for all organisations in Oxfordshire and for the public.

The aims are simple:

1. To report on progress made in the last year and set out challenges for the next year;
2. To galvanise action on five main threats to the future health, wellbeing and prosperity of Oxfordshire; and
3. To add an emphasis on two strongly emerging threats, namely those posed by dementia and alcohol abuse.

The five main long-term threats are:

- Breaking the cycle of deprivation
- An ageing population – the “demographic time bomb”
- Mental health and wellbeing: avoiding a Cinderella service
- The rising tide of obesity
- Fighting killer infections

The threat posed by dementia is described in the chapter on an ageing population.

The threat posed by alcohol abuse takes its place as the sixth long-term threat to health.

Progress will be monitored in future reports. Long-term success will depend on achieving wide consensus across many organisations.

The Cabinet is RECOMMENDED to recommend the Council to approve and adopt the recommendations in the report.

10. Home to School Transport Policy (Pages 241 - 296)

Cabinet Member: Schools Improvement

Forward Plan Ref: 2010/072

Contact: Neil Darlington, Service Manager – Admissions & Transport Tel: (01865) 815844

Report by Director for Children, Young People & Families (**CA10**).

The current Home to School Transport Policy goes beyond statutory requirements, primarily in the provision made for faith transport and some non Oxfordshire residents. and is inequitable. The proposed Home to School Transport Policy for 2011/12 removes these inequalities, meets all current statutory requirements and would result in significant cost savings. However, in addressing these issues the proposed new policy will have an adverse impact on some families, for example those non-Oxfordshire residents who live in Caversham and those Catholic families in the Bicester area who receive subsidised travel to the Blessed George Napier School, Banbury. An Equality Impact Assessment has been completed for the proposed new policy.

Given that there would be a phased introduction of the proposed policy changes to transport provided on faith grounds the maximum savings related to secondary schools would be realised from September 2015 and for primary schools from September 2017. At current prices the proposals on faith transport would save a maximum of approximately £639,000 per annum from the academic year 2017/18.

Implementing the proposal on transport to Chiltern Edge School would, at current prices, save approximately £58,000 per annum from 2015/16.

Therefore at current prices the total possible savings per year amount to approximately £697,000 from 2017/18.

It is RECOMMENDED that the Cabinet approves the proposed new Home to School Transport Policy set out in Annex A to the attached report.

11. Homes & Communities Agency Single Conversation: Local Investment Agreement (Pages 297 - 360)

Cabinet Member: Growth & Infrastructure

Forward Plan Ref: 2010/086

Contact: Ian Walker, Spatial Planning Manager Tel: (01865) 815588

Report by Head of Sustainable Development (**CA 11**).

In March this year the Cabinet considered a report on the work with the Homes and Communities Agency to develop a Local Investment Plan (LIP) and Local Investment

Agreement (LIA) for Oxfordshire. The LIP was signed off by the Oxfordshire local authorities at the end of March and submitted to the Homes & Communities Agency.

The LIA has been prepared to commit the parties (the HCA and local authorities) to implementing the LIP. The aim is for the LIA to be signed off by the Spatial Planning and Infrastructure Partnership (SPIP) at the end of June, following consideration by meetings of the Cabinet/Executive of the six Oxfordshire local authorities.

The Cabinet is RECOMMENDED to:

- (a) ***agree that the County Council enters into the proposed Oxfordshire Local Investment Agreement (LIA); and***
- (b) ***delegate authority to finalise the wording of the LIA to the Head of Sustainable Development, to be exercised after consultation with the Cabinet Member for Growth and Infrastructure.***

EXEMPT ITEMS

In the event that any Member or Officer wishes to discuss the information set out in Annexes 1 and 2 to the report (CA12), the Cabinet will be invited to resolve to exclude the public for the consideration of those Annexes by passing a resolution in relation to that item in the following terms:

"that the public be excluded during the consideration of Annexes 1 and 2 since it is likely that if they were present during that discussion there would be a disclosure of "exempt" information as described in Part I of Schedule 12A to the Local Government Act, 1972 and specified below the item in the Agenda".

NOTE: The report does not contain exempt information and is thus available to the public. The exempt information is contained only in the confidential Annexes 1 & 2.

ANNEXES 1 & 2 TO THE REPORT HAVE NOT BEEN MADE PUBLIC AND SHOULD BE REGARDED AS 'CONFIDENTIAL' BY MEMBERS AND OFFICERS ENTITLED TO RECEIVE THEM.

THIS IS FOR REASONS OF COMMERCIAL SENSITIVITY AND THE FINANCIAL RISK TO THE COUNCIL IF THE CONTENTS ARE DISCLOSED.

THIS ALSO MEANS THAT THE CONTENTS SHOULD NOT BE DISCUSSED WITH OTHERS AND NO COPIES SHOULD BE MADE.

12. New Contract for Specialist Health Services for People with Learning Disabilities (Pages 361 - 376)

Cabinet Member: Adult Services

Forward Plan Ref: 2010/076

Contact: Lara Fromings, Service Manager, Commissioning & Contracting (Learning Disabilities), Tel: (01865) 323629; Adam Marshall, Unit Manager, Commissioning &

Contracting (Learning Disabilities) Tel: (01865) 323635

Report by Director for Social & Community Services (**CA12**).

(The information contained in Annexes 1 & 2 is 'exempt information' in that it falls within the following prescribed category:

(3) information relating to the financial or business affairs of any particular person (including the authority holding that information)

It is considered that in this case the public interest in maintaining the exemption outweighs the public interest in disclosing the information, in that disclosure would distort the proper process of the transaction and the Council's standing generally in relation to such transactions in future, to the detriment of the Council's ability properly to discharge its fiduciary and other duties as a public authority.

The Council is the lead commissioner for health and social care services for adults with Learning Disabilities in Oxfordshire. As part of this responsibility, the Council contracts with Ridgeway Partnership NHS Trust for the provision of community health and inpatient services to meet the specialist health needs of adults with learning disabilities in the County. This contract expires at the end of December 2010.

In order to meet its responsibilities for the provision of specialist health services for people with learning disabilities in Oxfordshire, the Social & Community Services Directorate (Learning Disability Commissioning & Contracting Team), Legal Services, and County Procurement Team have worked with NHS Oxfordshire to specify and tender this element of service in accordance with the Council's Procurement Rules.

The Cabinet is RECOMMENDED to approve the signing of a contract with Ridgeway Partnership to provide specialist health services for people with Learning Disabilities

13. Request for Exemption from Tendering under Contract Procedure Rules - LSC contracts (Pages 377 - 382)

Cabinet Member: Deputy Leader

Forward Plan Ref: 2010/085

Contact: Sarah Cullimore, 16-19 Education Service Manager, Tel: (01865) 328089; Sandra Higgs, Strategic Leader, 14-19 Oxfordshire, Tel: (01865) 328546

Report by Children, Young People & Families (**CA13**).

The report seeks approval for exemption from tendering requirements for contracts for the 2010/11 academic year, for seven 16-19 education contracts passed to the Council from the former Learning and Skills Council (LSC) as part of the Council's new statutory responsibilities for 14-19 education from April 1st 2010, as specified within the Apprenticeships, Skills, Children and Learning Act, 2009.

Summary of the contracts:

-Three contracts are with colleges (total annual value £36.15m);

- One contract is with a higher education Institution (annual value £498,000); and
- Three contracts are with independent training providers (total annual value £593,000).

The Young Peoples Learning Agency (YPLA) has been set up to support and enable local authorities to carry out their new responsibilities and the YPLA is responsible for providing the Council with the funding for these contracts.

The LSC determined the allocations under its own procurement rules prior to the transfer of responsibilities and the YPLA has named the providers which the Council must contract with for the academic year 2010/11. The Council will be bound by grant conditions issued by the YPLA that will specify these individual allocations.

The exemption is requested under rule 5.4.2: No genuine competitive market can be obtained.

The Cabinet is RECOMMENDED to approve exemption from the Council's Contract Procedure Rules (under rule 5.4.2) for the 2010/11 academic year.

14. Appointments to Outside Bodies (Pages 383 - 398)

Cabinet Member: Leader

Forward Plan Ref: 2010/057

Contact: Tony Cloke, Assistant Head of Legal & Democratic Services Tel: (01865) 815314, Sue Whitehead, Committee Services Manager Tel: (01865) 810262

Report by Assistant Head of Legal & Democratic Services (**CA14**).

This report asks the Cabinet to consider member appointments to a variety of bodies which in different ways support the discharge of the Council's executive functions and to create two new 'Member Champion' positions

The Cabinet is RECOMMENDED to:

- appoint Councillor Lorraine Lindsay-Gale to the position of 'Heritage Champion' (in place of Councillor Don Seale);***
- create the new position of 'Motorcycle Champion' and appoint Councillor Lorraine Lindsay-Gale to that position;***
- create the new position of 'Efficiencies Champion' and appoint Councillor CH Shouler to that position; and***
- agree the remaining appointments as set out in the Annex to this report and, where necessary, make further or substitute appointments.***

15. Forward Plan and Future Business (Pages 399 - 402)

Cabinet Member: All

Contact Officer: Sue Whitehead, Committee Services Manager (01865 810262)

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 **CA15**. 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, 18 May 2010 commencing at 2.00 pm and finishing at 3.51 pm.

Present:

Voting Members:

Councillor Keith R. Mitchell CBE – in the Chair
Councillor David Robertson (Deputy Chairman)
Councillor Arash Fatemian
Councillor Ian Hudspeth
Councillor Kieron Mallon
Councillor Louise Chapman
Councillor Michael Waine
Councillor Rodney Rose
Councillor Mrs J. Heathcoat

Other Members in Attendance:

Councillor Anne Purse)
Councillor Lorraine Lindsay-Gale) Agenda Item 6
Councillor Charles Mathew)

Councillor Jean Fooks (Agenda Item 7)

Officers:

Whole of meeting Chief Executive, S. Whitehead (Corporate Core)

Part of meeting

Agenda Item

	Officer Attending
6.	P. Day (Environment & Economy)
7.	S. Corrigan, S. James (Strategic HR &OD, Corporate Core)

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.

48/10 APOLOGIES FOR ABSENCE

(Agenda Item. 1)

Apologies were received on behalf of Councillor Jim Couchman.

49/10 MINUTES

(Agenda Item. 3)

The Minutes of the meeting held on 20 April 2010 were approved and signed.

50/10 QUESTIONS FROM COUNTY COUNCILLORS

(Agenda Item. 4)

Councillor Jean Fooks had given notice of the following question to the Deputy Leader:

“There is still a problem with the new phone system in County Hall. I rang the main County Council number, 792422, the other day and the phone just rang and rang – then cut off, with no message or opportunity to leave a message. I was told that this is happening to other people too. Could the Cabinet member follow this up, as it is extremely poor customer service?”

Councillor Robertson replied that general enquiries were going to be transferred to the new contact centre on 5 July. Whilst all new systems had some teething troubles he understood the frustrations felt particularly by members of the public. The problem had been reported to IT support services for resolution and he would be upset if similar problems occurred in the future.

Councillor Jean Fooks had given notice of the following question to the Cabinet Member for Schools Improvement:

“The most recent Admissions figures for September 2010 show that the County Council is very short of reception class places, particularly in the city of Oxford. It is very clear that new school places will be needed for September 2011 and the currently planned increases look to be inadequate. If the bulge is repeated in subsequent years, which looks extremely likely, more places are going to be needed right through the primary schools, putting huge pressure on existing schools and causing huge problems for parents.

What plans are being developed to meet this growing school population? The review of the city catchment areas is urgently needed as well as provision of new places, probably new schools, across the county. When will the review take place and when could it be implemented? Where does the cabinet member hope to be able to provide new school places throughout the primary phase?”

Councillor Waine:

- Through the strenuous efforts of officers, working very closely with headteachers and governors, it has been possible, once again, to ensure that every child whose parents have requested a school place has been offered one; the overwhelming majority (c.90%) have received the offer of a place at their first preference school. This has required a number of tough decisions but I am committed to ensuring that the Council continues to meet its statutory duty to ensure an overall sufficiency of school places.
- It is indeed the case that if you add up all the Published Admission Numbers of our schools there was a shortfall of places for Reception age pupils, but for September 2010 we have managed to create and additional 530 or so places. This has been achieved through a combination of installing temporary classrooms (as a precursor to permanent buildings), bringing classrooms back into use as teaching spaces, and schools being flexible about how they group children. In Oxford (and immediate vicinity) alone 220 places have been created.
- Population forecasts suggest that the current levels of demand will continue for the next 2 - 3 years to be followed by a slow decline, reaching pre-2008 levels within about a decade.
- Schools which can be adapted/expanded to accommodate larger intakes on a permanent basis have been identified and schemes to deliver additional classrooms are at various stages of development; some have already been subject to the necessary statutory expansion consultations. Headteachers and governors of schools which may have the potential for permanent expansion, but which have yet to agree to this, will be approached in order to further increase the number of additional school places that can be created.
- Where there are to be substantial new housing developments we will take the opportunity either to create brand new schools or secure funding to expand local schools; the Council's developer contribution team is working hard to secure funding from developers (S.106 contributions).
- Changes to catchment areas obviously don't create any additional school places but they can help to better match 'supply and demand' and help parents to reach an informed view about the likelihood of obtaining a place at their preferred school. Preparatory work for a review of Oxford catchment areas will be undertaken during the summer in order that any possible changes can be subject to the fullest consultation in the autumn/winter as part of the annual statutory consultation on school admission arrangements. The earliest that catchment area changes (other than those already subject to consultation such as that for Wolvercote School) can be implemented is for September 2012 admissions.
- As far as it is possible so to do, additional primary school places will be created close to where the additional children live as part of our 'Primary Strategy for Change' commitment to creating an 'outstanding school at the heart of the community'.

51/10 PETITIONS AND PUBLIC ADDRESS

(Agenda Item. 5)

The following requests to address the meeting had been agreed:

Speaker	Item
Cllr Purse (Shadow Cabinet Member for Growth & Infrastructure)) Cllr Mathew Cllr Lindsay-Gale Julie Hankey - Oxfordshire Upper Thames Residents Against Gravel Extraction (OUTRAGE) John Taylor - Parishes Against Gravel Extraction (PAGE) David Scott - Burcott and Clifton Hamden protection of river Thames (BaCHporT)	Item 6 - South East Plan: The Secretary Of State's Proposed Changes to Policy M3 Primary Land-Won Aggregates and Sub-Regional Apportionment, March 2010
Councillor Jean Fooks	Item 7 – Establishment Review

52/10 CONSULTATION ON THE SECRETARY OF STATE'S PROPOSED CHANGES TO SOUTH EAST PLAN POLICY M3 (PRIMARY AGGREGATES PROVISION AND APPORTIONMENT)

(Agenda Item. 6)

Cabinet considered a response (**CA6**) to the consultation by the Government Office for the South East on the Secretary of State's Proposed Changes to the Regional Spatial Strategy for the South East (South East Plan) Policy M3 – Primary land-won aggregates and sub-regional apportionment.

Councillor Anne Purse supported the points made in the report and the recommendations. She commented that it did not appear fair for Oxfordshire to have increased totals whilst the South East saw reductions and that the approach referred to in paragraph 16 of not protecting anything below national designations was a threat to bio-diversity.

Councillor Charles Mathew spoke in support of the recommendations, thanked the Cabinet Member and officers for their work and spoke in particular about the level of production against the national annual usage and sustainability issues connected with transporting the additional materials outside Oxfordshire.

Councillor Lorraine Lindsay-Gale broadly supported the recommendations and referred to the threat to parishes in her Division of Dorchester and Berinsfield. She supported the views of local groups PAGE and BaCHporT. She stated that she would wish to see an even lower figure being pursued than the 1.58m tonnes/annum to reflect supply and demand. She wished to see the County do its own predictive modelling and to become one of the leading recyclers of aggregates.

Julie Hankey, **Oxfordshire Upper Thames Residents Against Gravel Extraction (OUTRAGE)** spoke endorsing the report, commenting that the increase was unsustainable in travel miles and that the proposals would destroy archaeology and diverse habitats.

John Taylor - **Parishes Against Gravel Extraction (PAGE)** referred to the impact on the quality of life for residents of Dorchester on Thames. The Group had spoken to people in local parishes who had raised key questions such as the basis for the raise to 2.1m tonnes when demand was less; why Oxfordshire would see an increase when other areas in the South East would see reductions and why the County was not developing a forecasting system.

David Scott - **Burcott and Clifton Hamden protection of river Thames (BaCHporT)** supported the points already made and highlighted that the increase was against a backdrop of decreasing demand. He queried the validity of Option 3 and commented that it was the County's duty to seek a reduction in apportionment.

The Cabinet Member for Growth and Infrastructure responded to the comments made and drew attention to the additional point to be included in the response.

RESOLVED: to:

- (a) agree the following response to the consultation by the Government Office for the South East on the Secretary of State's Proposed Changes to Regional Spatial Strategy for the South East (South East Plan) Policy M3 – Primary land-won aggregates and sub-regional apportionment:
 - (i) the County Council objects to the proposed changes to the sand and gravel figures in Policy M3, particularly the regional figure of 11.12 million tonnes a year and the Oxfordshire figure of 2.10 million tonnes a year, for the reasons set out in paragraph 20 of this report;
 - (ii) the County Council believes that, in the light of the proposed reduction in the regional sand and gravel figure, the Oxfordshire apportionment should be reduced from the current level of 1.82 million tonnes a year; the County Council

supported the lower figure of 1.58 million tonnes a year for Oxfordshire proposed by SEERA in March 2009.

- (iii) the County Council supports the proposed changes to the crushed rock figures in Policy M3;
 - (iv) the County Council supports the other proposed changes to the wording of Policy M3, in particular the inclusion of a statement that apportionments will be subject to testing of deliverability in the preparation of Mineral and Waste Development Frameworks;
- (b) authorise the Head of Sustainable Development, in consultation with the Cabinet Member for Growth and Infrastructure, to submit a response to the consultation based on this report.

53/10 ESTABLISHMENT REVIEW - MAY 2010

(Agenda Item. 7)

Cabinet considered a report (**CA7**) that gave an update on activity since the implementation of the Establishment Review and associated Recruitment Approval process on 1 August 2005. Details of the agreed establishment figure at 31 March 2010 in terms of Full Time Equivalents was provided, together with the detailed staffing position at 31 March 2010. The report also contained information on grant funded posts and those vacancies which are being covered by agency staff and at what cost.

Councillor Jean Fooks, Opposition Deputy Leader, stated that she was still unclear about the true vacancy and agency staff figures; suggested that there was a danger of double counting with regard to long term sickness and that it might be useful to have a column showing unfilled posts.

Councillor Robertson responded to the comments made and in particular stressed that the balance between agency and permanent staff was always monitored to ensure value for money. He noted that any vacancies held for more than six months had to be justified for the post to be retained. He added that he was pleased to see the reduction in advertising costs and commented that he felt that the report was useful and that the information was now being reported earlier.

RESOLVED:

to:

- (a) note the report;
- (b) confirm that the Establishment Review continues to meet the Cabinet's requirements in reporting and managing staffing numbers.

54/10 FORWARD PLAN AND FUTURE BUSINESS

(Agenda Item. 8)

(Agenda Item)

The Cabinet considered a list of items (CA8) 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.

55/10 PLANNING OBLIGATION NON PAYMENT OF CONTRIBUTION

(Agenda Item. 9)

In accordance with Regulation 16 of the The Local Authorities (Executive Arrangements) (Access to Information) (England) Regulations 2000 (as amended), the Chairman of the Strategy & Partnerships Scrutiny Committee (since this is a finance related item) has agreed that the need to take the decision is urgent and cannot reasonably be deferred.

The Chairman agreed that the report be considered as a matter of urgency because of the urgent need to address a local community concern, the financial risk to the Council if further house sales fall through and to meet a Council commitment that the matter would be dealt with by the end of May.

RESOLVED: to:

- (a) write off the debt of £74,667.09 in connection with this planning obligation; and
- (b) request confirmation of the write off in the next financial monitoring report to the Cabinet.

..... in the Chair

Date of signing

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Division(s): N/A

CABINET – 22 JUNE 2010

PROVISIONAL REVENUE & CAPITAL OUTTURN 2009/10 AND REQUESTS FOR CARRY FORWARDS

Report by the Chief Finance Officer

Introduction

1. This report presents the provisional revenue and capital outturn for 2009/10, identifies and explains how actual expenditure and income for the year compares to the budgeted position, and includes proposals for the allocation of revenue carry forwards in 2010/11. Figures shown in the report reflect those included in the Council's Statement of Accounts for 2009/10 which will be submitted to Audit Committee on 30 June 2010, prior to audit. However, for reporting and presentational purposes some figures may vary.

2. The year end position for 2009/10 is summarised below.

Original Budget 2009/10 £m		Latest Budget 2009/10 £m	Provisional Outturn 2009/10 £m	Variance to Latest Budget £m	Variance to Latest Budget %
373.042	Revenue (*)	378.836	377.015	-1.821	-0.48
100.444	Capital	101.913	93.996	-7.917	-7.77
12.463	General Balances	10.500 ¹	11.145	+0.645	+6.14
58.291 ²	Reserves	36.752 ³	60.764	+24.012	+65.33%

3. The detail for each Directorate is summarised within the report and individual reports for each Directorate are available in the Members' Resource centre.

(*) Throughout the report a minus sign represents an underspend compared to the final approved budget and a positive sign indicates an overspend.

¹ Per the Chief Finance Officer's Commentary on the 2010/11 – 2014/15 budget considered by Council on 9 February 2010.

² Per Service & Resource Planning – Financial Plan 2009/10 – 2013/14

³ Per February 2010 Financial Monitoring Report to Cabinet on 20 April 2010.

4. The following Annexes are attached and referenced in the report:

Annex 1	Provisional Revenue Outturn (Summary and by Directorate)
Annex 2 (a)	Proposed carry forwards to 2010/11
Annex 2 (b)	Proposed virement of 2009/10 underspends to other budget heads.
Annex 3	Specific Grants and Area Based Grant
Annex 4	Earmarked Reserves and Provisions
Annex 5	General Balances
Annex 6	On and Off – Street Parking Account – Statement of Income and Expenditure for 2009/10
Annex 7	Shared Services Cash Flow forecast
Annex 8	Savings achieved in 2009/10
Annex 9	Unit cost and activity monitoring
Annex 10	Provisional Capital Outturn (Summary and by Directorate)

Part 1 – Provisional Revenue Outturn

Summary

5. Annex 1 shows the provisional revenue outturn by Directorate. This is a net underspend of -£1.821m, or a -0.48% variation to the final approved budget of £378.836m. The year end revenue position for 2009/10 can be summarised as follows:

2009/10	Gross Expenditure £m	Income £m	Net Expenditure £m
Original Budget	853.575	-480.533	373.042
Brought forward from 2008/09	2.428	0.000	2.428
Virements & Grant Changes	15.245	-15.764	-0.519
Supplementary Estimates	3.670	0.215	3.885
Final Approved Budget	874.918	-496.082	378.836
Provisional Outturn	946.193	-568.341	377.852
Total Variation	+71.275	-72.259	-0.984
Less items funded corporately from balances (see paragraphs 7 & 8)	-0.062	0.000	-0.062
Less City Schools Reorganisation ⁴	-0.775	0.000	-0.775
Directorate Variation	+70.438	-72.259	-1.821

6. For comparison the Directorate revenue variation at the end of 2008/09 was -£2.119m and represented -0.57% of the budget.

⁴ The net cost of the city schools reorganisation will be carried forward reflecting the agreed payback arrangements. This is accounted for in the general balances total.

Directorate Variations (Annex 1 column 11)

7. Explanations of the major variances from budget for each Directorate are provided in the subsequent paragraphs. The Directorate outturn of -£1.821m compares to a forecast overspend of +£3.619m in the last Financial Monitoring Report to the end of February 2010, a change of -£5.440m. Of that -£2.735m, reflects Supplementary Estimates that were still subject to approval at the end of February 2010.

Original Budget 2009/10 £m	Directorate	Latest Budget 2009/10 £m	Provisional Outturn Variance 2009/10 £m	Forecast Variance February 2010 £m	Outturn Variance %
98.277	Children, Young People & Families	97.288	-0.775	+0.793	-0.80
166.800	Social & Community Services	167.145	+0.736	+0.772	+0.44
68.631	Environment & Economy	71.229	-0.406	+0.149	-0.57
29.908	Community Safety & Shared Services	30.598	-0.805	-0.494	-2.63
9.426	Corporate Core	12.576	-0.571	+2.399	-4.54
373.042	Total	378.836	-1.821	+3.619	-0.48

Plus:			
Plus: City Schools Reorganisation	+0.775	+0.775	
Plus: Reallocation of Dedicated Schools Grant		+2.101	
ICT Refresh		+1.500	
Total	-1.046	+7.995	
Provisional Outturn variation as per Annex 1 (column 11)			

Memorandum Accounts:			
Older People, Physical Disabilities & Equipment Pooled Budget	+2.106 ⁵	+2.509	
Learning Disabilities Pooled Budget	-0.101	-0.192	

⁵ +£0.790m of this, relating to the overspend on the Council elements, is included in the outturn variance for Social & Community Services shown above. The balance is the responsibility of Oxfordshire Primary Care Trust (PCT).

Variations Returned to Council (Annex 1 Column 10)

8. Certain variations are excluded from Directorate carry forwards because they represent variations to budgets which are recognised to be outside the control of the Directorate and are therefore funded from balances. The following variations are returned to, or calls on, balances in 2009/10. The total call on balances is +£0.062m.

Directorate	Variation	Calls on £m	Returns to £m
Environment & Economy	Non – domestic rates (for whole Council)	+0.115	
Community Safety	Retained Firefighters (paragraph 62) Firefighter Pension Scheme – ill health retirements (budget not spent)	+0.211	-0.044
Corporate Core	External Audit Fee Coroner's Services		-0.202 -0.018
Total		+0.326	-0.264

Children, Young People & Families (CYP&F): in - year Directorate underspend of -£0.775m (-0.8% of the final budget)

9. The outturn position excludes the variance of +£0.775m relating to the City Schools Reorganisation for which there is a planned repayment scheme for the recovery up to 2011/12. As indicated during the year the final position includes the use of £2.101m Dedicated Schools Grant (DSG), along with contributions from reserves of £1.523m. Whilst this funding is one off, the ongoing pressures, predominantly in Children & Families, have been considered and addressed as part of the 2010/11 budget agreed by Council on 9 February 2010.

	Final Approved Budget 2009/10 £m	Provisional Outturn Variance £m	Variation to Final Approved Budget %	February 2010 Variance £m	Change since February £m
Young People and Access to Education	23.817	-0.398	-1.67	-0.047	-0.351
Children & Families	27.665	+3.252	+11.75	+3.955	-0.703
Raising Achievement Service	9.717	-0.923	-9.50	-0.164	-0.759
Commissioning, Performance & Quality Assurance	36.985	-0.604	-1.63	-0.850	+0.246
Schools	-0.896	-1.327 ⁶	+148.00	-1.326	-0.001
Annex 1 Total	97.288	0.000	0.00	+1.568	-1.568
Less City Schools Reorganisation		-0.775		-0.775	
Total	97.288	-0.775	-0.775	+0.793	-1.568

⁶ +£0.775m planned overspend on City Schools Reorganisation less £2.101m Dedicated Schools Grant.

YOUNG PEOPLE & ACCESS TO EDUCATION

10. The total underspend in Young People and Access to Education is -£0.398m, an increase of -£0.351m since the February report. The underspend and movement largely relates to Services to Disabled Children where one – off backdated rental income was received close to year end and residential placement costs were lower than forecast.
11. Connexions (within the Youth Support Service) has a year-end underspend of -£0.188m. This service is funded through Area Based Grant so the underspend is being requested to be carried forward to allow the contractor liability for 2010/11 to be met.

CHILDREN & FAMILIES

12. The final outturn variation for Children & Families is an overspend of +£3.252m. This has decreased by £0.703m since the February report. Of this position a net overspend of +£0.172m relates to services funded by Dedicated Schools Grant (DSG).

Placements

13. Consistent with the national picture, there has been a significant rise in care proceedings following with the Baby P case and an associated increase in court ordered parenting assessments. In 2009/10 there has been a rise of 22% entering care, and in line with the Children Act 2008, more children and young people aged 16 or more are also staying in care for longer periods with more participating in further and higher education.
14. There has been a larger number of placements at higher average cost in 2009/10. For example, there was a requirement for 603 secure/remand placement days, costing an average of £5,000 per week. None were required in 2008/09. In addition, the number of placement days for parent and baby, costing an average of £2,800 per week was 2,225 compared to 277 in 2008/09.
15. As a result of these service pressures the budget overspent by +£1.825m, although this had decreased by £0.285m since the last report. Income received from the PCT in March was partly offset by additional expenditure. £0.523m of the carry forward from 2008/09 was placed in the CYP&F reserve to offset pressures within the directorate. Given that the placements budget is significantly overspent, this reserve has been applied in this area. After taking account of the contribution from reserves, the remaining overspend is +£1.246m.
16. In February 2010 Cabinet agreed a supplementary estimate of £0.300m to cover the pressures arising from the Southwark Judgement. This has offset all the pressures arising in 2009/10 relating to the reclassification of existing clients.
17. The authority currently has 63 Special Guardianship Orders (SGOs) in place. Twelve were new in 2009/10 with a further eight still in progress. There is a +£0.237m overspend on this budget.

18. There is a +£0.171m overspend relating to the foster care service. This includes pressure on legal costs of £0.090m reflecting a significant increase in care proceedings during the year. The service has now revised its eligibility criteria for legal costs.

Asylum Seekers

19. An overspend of +£1.049m was carried forward from 2008/09 in relation to the cost of supporting asylum seeking children. During 2009/10 Special Circumstances Grant relating to 2008/09 and prior years was received totalling £0.459m bringing the residual unfunded balance to +£0.590m. A further pressure of +£1.039m relates to costs incurred in 2009/10 where the grant received was again significantly less than the costs incurred.
20. At the end of 2008/09 a contribution to reserves of £1.0m was made with the intention of offsetting asylum pressures. By utilising this reserve in 2009/10 the pressure relating to previous years can be fully offset along with part of the current year pressure. The remaining overspend is +£0.629m. It is proposed that this overspend will be carried forward and the service will apply for Special Circumstances Grant. It is unclear whether the authority will receive any grant.
21. In addition to the main asylum pressure there is an overspend of +£0.225m on homelessness relating to families without recourse to public funds. Costs relate to emergency and temporary accommodation and fostering expenses. The authority cannot obtain grant funding for these clients as they do not meet the terms and conditions of the grant but the Council is obliged to support them.
22. There is a +£0.160m overspend on the Leaving Care budget. This pressure (not previously reported) relates to an increase in client numbers.
23. Pressures and savings agreed in previous Service & Resource Planning processes for Children & Families have been allocated to the Head of Service cost centre. Previous reports forecast that the pressure in this area would be +£0.850m. However, due to the pressures being managed and reported in the relevant service area the final overspend is +£0.262m.

DSG Funded Services (Children & Families)

24. Nursery Education Funding (NEF) is £0.546m in excess of the budget. The overspend arises from an increase in the number of 3 year olds in 2009/10 together with the full time offer for all children in their final foundation stage in the private, voluntary and independent sector. Part of this pressure can be offset by -£0.374m of underspends on DSG in other areas within Early Years, including the unspent Early Years Development Fund. In future years this funding will continue to be used to offset the pressures on NEF.

RAISING ACHIEVEMENT SERVICE

25. The outturn for the Raising Achievement Service is an underspend of -£0.923m. This has increased by -£0.759m since February and relates to the Ethnic Minority Achievement Service (EMAS) and Oxfordshire Education

Business Partnership (OEBP) variances, and also the achievement of more Oxfordshire Quality Schools Association (OQSA) income.

26. The underspend of -£0.336m on EMAS relates to unspent Performance Reward Grant received in 2007/08. A request for this to be carried forward is included in Annex 2a.
27. Over a number of years, the OEBP have accumulated a balance of -£0.325m as a result of generating additional income alongside the funding they received from the Learning & Skills Council. The Directorate Leadership Team agreed that this balance will be used to contribute to the overall year end position.
28. Throughout the year it has been reported that the service area as a whole would not be able to achieve its full school subscription (OQSA) income target of £0.970m. £0.284m income was generated so the shortfall is £0.686m. This pressure is being managed across the whole directorate in 2010/11.
29. The School Development (LA element) Area Based Grant is underspent by -£0.848m. On a one-off basis this underspend will be used to offset the OQSA income shortfall but in future the service is planning to fully utilise this grant as part of their savings plans in order to release core funding.
30. Outdoor Education Centres have overspent by +£0.142m. This has arisen from an income shortfall, staffing pressures and increased transport costs. The intention is that the service should be self-financing in future years.

COMMISSIONING, PERFORMANCE & QUALITY ASSURANCE (CPQA)

31. The provisional outturn for CPQA is an underspend of -£0.604m. This has reduced by £0.246m since the February monitoring report as a result of increased overspends relating to the Head of Service staffing costs and business efficiencies, and also pressures in support service recharges.
32. The Children's Information & Integration Programme (ChIIP) overspent by +£0.339m. The overspend relates to ongoing project costs, including support for Frameworki and contractual payments. Additional funding has been agreed by 2010/11.
33. There is an underspend of -£0.318m on the Premature Retirement Compensation budget due to the number of cases being brought to the Severance Panel. The underspend is being requested as a carry forward to meet anticipated ongoing committed costs in 2010/11 following the agreed budget saving of £0.750m as part of the Service & Resource Planning process.
34. Home to School Transport underspent by -£1.491m. -£0.371m relates to an underspend on Area Based Grant funding due to a lack of take up of the Extended Rights for Free Travel scheme and an underspend on the Sustainable Travel budget. The other savings have been achieved by the Integrated Transport Unit (part of the Environment & Economy directorate)

through route changes and favourable contract retenderings. Costs have also been lower this year due to contractors not charging the service for days when schools were closed as a result of snow and concessionary income has been higher than expected. By 2014/15 of the Medium Term Financial Plan (MTFP) the budget for Home to School Transport will be £2.5m lower than in 2009/10 as the service meets its share of the Council's savings target.

35. Throughout the year the directorate has been forecasting an overspend on a number of cross directorate issues. At the year-end the position is +£0.639m and relates to advertising and interim cover costs associated with the Director and Head of CPQA posts, budget transfers for Unison, Staff Care Services increased telephone costs.
36. An overspend of +£0.399m relating to costs associated with the restructuring was brought forward from 2008/09. At the end of 2009/10 this has decreased to +£0.304m. It is proposed to carry forward this amount forward until it has been repaid by 2011/12.

DEDICATED SCHOOLS GRANT (DSG) (Non – Delegated)

37. The balance on the non-delegated DSG contingency (i.e. unspent DSG) was £4.281m. Of this £2.101m has been used to aid the overall Directorate position by charging eligible costs that would otherwise have been met from Council funding against the grant.
38. An overspend of +£0.870m on schools' repair and maintenance was carried forward from 2008/09. Over a number of years costs had been coded incorrectly and were not charged against delegated school budgets. During 2009/10 there was a reduced overspend of +£0.319m. A review of the costs is continuing and the processes involved are being improved to ensure that costs are coded correctly. In the 2009/10 accounts the total overspend of +£1.189m will be funded by unspent DSG. When the money is recouped in future years it will be available to spend on other DSG funded activities.
39. After taking into account the above, an underspend on DSG of £0.991m remains for which a receipt in advance has been made. -

Use of Underspends and DSG to offset overspends in 2009/10

40. Annex 2a and 2b show underspends of £6.100m (including total underspends of -£3.999m on Council funding and £2.101m DSG) being used to offset overspends of the same amount. Some of these adjustments are larger than £0.500m and these will require Council approval on 14 September 2010. Cabinet is recommended to recommend that Council approve the application of the underspends to the proposed alternative uses.

Social & Community Services (S&CS): in - year Directorate overspend of +£0.736m (+0.44% of the final budget)

Service Area	Final Approved Budget 2009/10 £m	Provisional Outturn Variance (Annex 1 Column 11) £m	Variation to Final Approved Budget %	February 2010 Variance £m	Change since February £m
Community Services	12.674	+0.311	+2.45%	+0.363	-0.052
Adult Social Care	129.874	+0.418	+0.32%	+0.343	+0.075
Major Projects & Supporting People	0.541	+0.001	+0.18%		+0.001
Strategy & Transformation	24.056	+0.006	+0.02%	+0.066	-0.060
Total	167.145	+0.736	+0.44%	+0.772	-0.036

COMMUNITY SERVICES

41. The total overspend for Community Services is +£0.311m. Within that, the overspend for Adult Learning has decreased from +£0.259m as at the end of February 2010 to +£0.233m. The reserve of £0.117m has now been fully utilised. As reported previously radical changes to the service are being implemented as part of a four year action plan to balance the service to the funding available and repay supplementary estimates of £0.181m. The recovery plan has been revised to take account of the final 2009/10 overspend. It is still anticipated that the service will be able to repay the supplementary estimate and bring the budget into balance by the end of 2012/13.
42. The Music Service overspend of +£0.122m is unchanged from the last report. A four year Music Service Change Programme has been drawn up to bring the service to a break – even position over this period so as with Adult Learning this overspend will also be carried forward to be recovered in future years.

ADULT SOCIAL CARE

43. The total overspend for Adult Social Care is +£0.418m. This includes the +£0.790m overspend on the Council's elements of the Older People's & Physical Disabilities Pooled Budgets as set out in paragraphs 49 to 53 below. At the end of February the service area was forecasting an overspend of +£0.343m. Before including the overspend on the Pool the year end underspend would have been -£0.372m. The underlying movement in the service area, before the overspend on the Pool was included, is -£0.715m. -£0.392m of this movement relates to Services for All Client Groups which is underspent by -£0.440m as follows:

	£m
Sensory Impairment Service	-0.072
Service Agreements	-0.090
Employment Services	-0.031
Adult Placement Services	-0.056
Asylum Seekers	-0.045
Direct Payments	-0.062
Adult Protection & Mental Capacity	-0.085
One off funding projects	-0.237
Occupational Therapy & Equipment	+0.224
Emergency Duty Team	+0.014
Total	-0.440

44. It is proposed that -£0.250m of the underspend should be carried forward to fund the transitional costs of the new Alert Service in 2010/11 and that a further -£0.025m should be carried forward in respect of costs related to the Mental Capacity Act.
45. There is an overspend of +£0.484m on Services for Older People. This has increased by £0.704m compared to the position reported in the February Monitoring Report. This is mostly due to the inclusion of the overspend of +£0.790m on the Older People's and Physical Disabilities Pooled Budget in this budget. The additional expenditure brought into this budget has been partially offset by higher than forecast income in March.
46. The main reasons for the overspend of +£0.484m are a net overspend of +£0.097m for residential services (including the overspend on the OP & PD pool), an overspend of +£0.538m on Care Management Teams, overachievement of income for Fairer Charging of -£0.144m due to higher client numbers throughout the year and an underspend of -£0.031m on Section 117 Reassessments.
47. Learning Disabilities is overspent by +£0.371m, a reduction of £0.096m compared to the February forecast. The movement is mainly due to additional income from the PCT in respect of salary costs and to higher than forecast client income in March. The net overspend is largely due to underachievement of income of +£0.288m. +£0.201m of this is due to adjustments made in 2009/10 in respect of income accrued in 2008/09 for two clients who were initially treated as full cost payers as they had failed to provide information for a financial assessment. The completion of the financial assessments during 2009/10 reduced the contributions significantly.
48. As set out in Annex 2b, a total underspends of -£1.744m are being requested to be vired to overspends or carried forward for other purposes. These include a virement of £0.589m from SC2_2a Contribution to Older People's Pool, and a virement of £0.538m to SC2_2b Care Management Teams. As the total and these individual requests are over £0.5m Council approval will be required.

POOLED BUDGETSOlder People's & Physical Disabilities Pooled Budget

49. As shown in the table the year end position on the Older People's and Physical Disabilities (OP&PD) Pooled budget was an overspend of +£2.106m. +£0.790m of that is the responsibility of the Council. +£1.316m relates to Oxfordshire Primary Care Trust (PCT).

Original Budget 2009/10 £m	Final Budget 2009/10 £m		Provisional Outturn Variance 2010 £m			February 2010 Variance £m	Change since February £m
			OP	PD	Total		
89.907	88.767	OCC Elements Forecast in-year variance	0.052	0.561	0.613	0.104	0.509
23.965	30.451	PCT elements Forecast in-year variance	3.060	-2.010	1.050	2.075	-1.025
	1.129	Use of Reserve					
113.872	120.347	Total OP&PD	3.112	-1.449	1.663	2.179	-0.516
1.657	1.658	Equipment Pool	0.443		0.443	0.330	0.113
115.529	122.005	Total - OP, PD & Equipment Pool	3.555	-1.449	2.106	2.509	-0.403

50. The Council element of the pool overspent by +£0.613m, an increase of +£0.509m compared to the February forecast. This was mainly due to increased expenditure on Residential and Nursing Homes because of the inclusion of 53 weeks of costs in 2009/10. External Home Support also cost more than expected previously because of increased client numbers.
51. The overspend on the PCT element of the pool was +£1.050m, a reduction of £1.025m on the February forecast. During March 2010 the PCT made an additional contribution of £2.317m to the pool, bringing the total additional contributions during 2009/10 to £6.317m. However, this was not sufficient to cover the additional expenditure to the end of the financial year. The increased spending was due to an increase in the level of provisions in relation to Continuing Health Care and higher than forecast spending on Continuing Health Care spot placements (including arrears), Medication Only Visits and Funded Nursing Care.
52. The +£1.316m overspend on the PCT element of the pool after taking account of their share of the Equipment Pool will be carried forward and form the first call on the PCT contribution in 2010/11. The total overspend of £0.790m on the Council element of the pool has been brought into the Services for Older People budget in the revenue account which has contributed to an overspend of £0.484m.

53. An overspend of +£0.383m is reported on equipment. Previous report note that February was the fifth consecutive month when the forecast overspend had been reduced. The Council share of the overspend is +£0.117m and the PCT share +£0.266m.

Learning Disabilities Pooled Budget

54. The year end position on the Learning Disabilities Pooled Budget is an underspend of -£0.101m. As set out in paragraph 134 this has been transferred to reserves. Efficiencies of £4.274m have been achieved by the service in 2009/10 to bring the Pool in balance by the year end.

Environment & Economy (E&E): in - year Directorate underspend of - £0.406m (-0.57% of the final budget)

Service Area	Final Approved Budget £m	Provisional Outturn Variance £m	Variation to Final Approved Budget %	February 2010 Variance £m	Change since February £m
Transport	41.713	-0.098	-0.23	+0.331	-0.429
Sustainable Development	25.312	-0.566	-2.24	-0.306	-0.260
Property Services	-0.906	+0.119	+13.13	-0.016	+0.135
Business Improvement	5.110	+0.139	+2.72	+0.140	-0.001
Total	71.229	-0.406	-0.57	+0.149	-0.555

TRANSPORT

55. Following the bad weather over the winter, supplementary estimates of £0.475m and £0.425m for repairs to the highway surface and the additional costs of winter maintenance were approved by Cabinet on 16 February 2010 and 20 April 2010. After taking account of these the year end underspend is -£0.098m or -0.23% of the final budget. Within that the variation on the Oxfordshire Highways budget of £25.2m was -£0.450m.

SUSTAINABLE DEVELOPMENT

56. An underspend of -£0.566m is reported for Sustainable Development. This has increased by -£0.260m compared to February. -£0.471m of the underspend relates to Waste Management. This reflects a 4% reduction in the absolute tonnages of waste disposed of compared to budgeted tonnages at the beginning of the year and an increase in the proportion of waste recycled or composted as shown in the table and also in Annex 9:

Waste Type	Budgeted Tonnes	%	Actual Tonnes	%	Variation Tonnes
Landfilled	197,800	58	155,880	53	-41,920
Recycled/Composted	130,595	47	140,763	42	+10,168
TOTAL	328,395		296,643		-31,752

57. Some of this variation can be explained by Schedule 2 customers, for example, charities, who became the authority's responsibility part way through 2009/10 landfilling substantially less than estimated. In addition, and as seen nationally, there has been a more general change of behaviour as a result of the current economic climate. The proportion of landfilled waste compared to total waste disposed of is also less than target. This is mainly due to the success of food and green waste disposal in the County.
58. As noted in paragraph 46 of the report to Cabinet on 20 April 2010, £0.650m has already been agreed to be transferred to reserves to support the funding of the Waste Recycling Strategy. In addition the £0.695m budget set aside for the purchase of Landfill Allowance Trading Scheme (LATS) credits is also available to support the strategy. Whilst some of the underspend at year end is required to offset variations elsewhere in the Directorate a further £0.293m will now be transferred to the reserve, taking the total to £0.943m.
59. The rest of Sustainable Development underspent by -£0.206m. As reported previously -£0.153m of that relates to the West End Project.

PROPERTY SERVICES

60. The final overspend in Property Services is +£0.119m. This has increased by £0.135m since the February report. Previously it had been assumed, further to paragraph 28 of the monitoring report to Cabinet on 20 October 2009, that the final overspend of +£0.215m on the Better Offices Programme, resulting from cost and funding changes in respect of the original business case, would be a call on balances at year end. However, due to the overall position across Environment & Economy at year end the Directorate have managed to absorb this corporate cost on a one off basis. An overspend of +£0.115m on non – domestic rates relating to properties across all Directorates has been funded from balances in line with Council policy.

BUSINESS IMPROVEMENT

61. The final overspend of +£0.139m for Business Improvement has not moved significantly from the previously reported position and relates to increased legal costs and staffing pressures.

Community Safety & Shared Services (CS&SS): in - year Directorate underspend of -£0.805m (-2.63% of the final budget)

	Final Approved Budget £m	Provisional Outturn Variance £m	Variation to Final Approved Budget %	February 2010 Variance £m	Change since February £m
Fire & Rescue	23.808	-0.085	-0.36	+0.011	-0.096
Emergency Planning	0.398	-0.035	-8.80	-0.020	-0.015

Safer Communities	0.900	+0.004	+0.44	-0.020	+0.024
Gypsy & Traveller Service	0.213	-0.074	-34.74	-0.060	-0.014
Trading Standards	2.514	+0.012	+0.48	+0.015	-0.003
Shared Services	2.765	-0.627	-22.68	-0.420	-0.207
Total	30.598	-0.805	-2.63	-0.494	-0.311

FIRE & RESCUE SERVICE

62. The Fire & Rescue Service underspent by -£0.085m. Within that the total overspend against the retained firefighters' pay budget is +£0.347m. This includes a provision of £0.225m for the cost of a backdated settlement of a national dispute (see paragraph 152). In previous years any variance against this budget for retained firefighters has been drawn from or returned to balances on the grounds that the cost of the retained duty system is largely driven by the number of emergency call outs. This year, the directorate has been able to use underspends totalling -£0.136m to cover part of the variance, leaving +£0.211m to be met from balances.

SHARED SERVICES

63. Underspends in Shared Services comprise:

	£m
Learning & Development Plan	-0.247
International Financial Reporting Standards project	-0.124
Other services (additional recharges and external income)	-0.256
Total	-0.627

64. Annex 7 shows the latest cash flow forecast for the original business case. The project will deliver the net business case saving of £11m (2009/10 prices) by November 2014, eight months later than the original target. The forecast includes a provision of £0.140m per annum for a business rates revaluation from 2010/11 which was not in the original business case but does not include further efficiency savings in the 2010/11 to 2014/15 Medium Term Financial Plan (MTFP) which will add a further £2.2m to cumulative savings by 2013/14. If these additional savings are added, the business target savings will be achieved before the March 2014 target. All other financial targets in the original business case will be met:

- Gross savings of £4.5m per annum have now been delivered
- Contributions will be made to the Council's efficiency savings of £2.173m in 2010/11 and £2.477m per annum from 2011/12
- the loan of £4.2m from the capital programme to fund Shared Services project costs will be repaid in full by March 2011 (£3m has already been repaid in March 2010).

65. Trading surpluses of £0.343m and £0.076m were achieved by Food with Thought and QCS Cleaning. The Common Hall Café recorded a deficit of £0.010m. The balances have been transferred to the Food with Thought Reserve.

Corporate Core (CC): in - year Directorate underspend of -£0.571m (-4.5% of the final net budget or -1.5% variation to the gross budget before recharges to other Directorates)

Service Area	Final Approved Budget ⁷ £m	Provisional Outturn Variance £m	Variation to Final Approved Budget %	February 2010 Variance £m	Change since February £m
Business Support	1.237	-0.031	-2.51%	-0.020	-0.011
ICT	2.204	+0.029	1.32%	+2.650	-2.621
Strategic Human Resources & Organisational Development	0.320	-0.217	-67.81%	-0.206	-0.011
Finance & Procurement	0.195	-0.122	-62.56%	-0.075	-0.047
Legal & Democratic Services	3.247	-0.010	-0.31%	+0.130	-0.140
Partnerships	0.180	-0.070	-38.89%		-0.070
Policy Unit	0.363	-0.122	-33.61%	-0.050	-0.072
Communications & Marketing	0.184	-0.028	-15.22%	-0.030	0.002
Change Fund	0.226				
Corporate & Democratic Core	4.420				
Total	12.576	-0.571	-4.5%	+2.399	-2.970

⁷ Budgets are net of recharges to other Directorates.

ICT

66. The February forecast was for an overspend of £2.650m:

	£m
Government Connect: implementation of an accredited and secure network between central government and local authorities. Completed in 2009/10 year in order to comply with government policy and allow access to the secure government network.	0.480
SAP Upgrade: The upgrade to the new version of SAP was completed in August 2009 but cost £0.480m more than budgeted.	0.480
Better Offices Programme (BOP): unbudgeted ICT costs associated with the BOP.	0.250
Foxcombe Court Re-build: overspend of £0.240m associated with a major refresh of IT.	0.240
Oxfordshire Community Network (OCN); reflects continuing growth of the OCN network and increasing costs above the rate of inflation.	0.400
IT Maintenance; pressure relating to growth in the number of applications and hardware supported and quantity of data stored.	0.300
Other	0.100
Redundancies arising from Phase 1 of the ICT Establishment Review.	0.400
TOTAL	2.650

67. Council agreed a supplementary estimate of £2.250m on 6 April 2010. As agreed by the Efficiencies Board the actual redundancy cost of £0.362m has been met from the Efficiencies Reserve. An action plan is in place to control costs in 2010/11. This includes a restructure of the ICT budget, devolving budgets to managers, a further review of the establishment and changes to service level agreements with directorates to ensure that all projects are fully funded.
68. The agency agreement with Oxford City Council for the provision of ICT services had gross revenue expenditure of £0.772m and net cost of zero. This excludes expenditure of £1.298m charged to the capital programme⁸. This has been treated as a soft loan with 20% per annum amortised over five years. Oxford City Council's contribution was £0.260m in 2009/10.

STRATEGIC HUMAN RESOURCES & ORGANISATIONAL DEVELOPMENT

69. The apprenticeship scheme has a planned underspend of -£0.065m. This reflects a six month delay in the scheme starting, so the underspend will be required to cover costs from April 2011 to September 2011. The remaining -£0.141m underspend is mainly in Organisational Development (OD) and there is a request to carry this forward for the Council's OD agenda. This will build on the momentum of the Lead Oxfordshire programme.

⁸ This replaces the £1.500m estimated revenue cost reported previously.

LEGAL & DEMOCRATIC SERVICES

70. There is a movement of -£0.140m between the February forecast and the final underspend of -£0.010m. This is partly because the February forecast excluded the effect of supplementary estimate of £0.060m for two legal cases each costing over £0.025m which was approved by Cabinet on 20 April. The remaining difference of -£0.080m reflects the improved legal trading account position at year-end. Fee earning income towards the end of the year was higher than expected and expenditure on counsel was lower than forecast.

Use of Carry Forwards from 2008/09 and Previous Years

71. £2.119m carry forwards from 2008/09 to be used in 2009/10 and subsequent years were set out in the Financial Monitoring Report to Cabinet on 23 June 2009. In addition £0.309m carry forwards from previous years were agreed for use in 2009/10 through the Financial Monitoring Report to Cabinet on 23 June 2009.
72. Following the receipt of grant funding in 2009/10 there was a remaining overspend of £0.590m on Asylum Seekers in Children, Young People & Families. As noted in paragraph 20 this has been offset by the use of the reserve created at the end of 2008/09. In addition an overspend of +£0.399m relating to the restructuring of the Directorate was carried forward from 2008/09. As noted in paragraph 36 and shown in Annex 2a, £0.304m of this will be carried forward to 2010/11 to be recovered in future years.
73. £0.107m held in the carry forward reserve relates to balances from 2007/08 that have not been utilised. Subject to approval through the Financial Monitoring Report to the end of April elsewhere on the agenda, £0.087m of this will be transferred to the Efficiency Savings reserve in 2010/11. A request has also been made to release the remaining £0.020m for use by Social & Community Services in 2010/11.

Proposed Carry Forward of under and over spends in 2009/10 to 2010/11

74. Under the Council's Financial Regulations, the Cabinet is responsible for approving all carry forwards. They will consider the allocation of carry forwards and determine whether they should be allocated to directorates or withheld in order to strengthen Council balances and enable resources to be allocated in future years when available funding is tight.
75. For 2010/11 overspends will only be allowed to be carried forward to the same budget head (where there are other underspends requested for carry forward) where there is a clear plan or rationale for recovering the overspend. Overspends carried forward are generally the first call against underspends carried forward within the Directorate.
76. Carry forwards of under spends, have been requested in writing through the Chief Finance Officer (with delegated officer approval) who has considered them, in consultation with the Cabinet Member for Finance, subject to an acceptable use and definite programme for expenditure. Directorates have either asked to carry forward underspends to the service in which they were generated or requested a virement of the carry forward to meet pressures in

other areas. In some cases the carry forward was planned and reflects the agreed use of one - off funding over more than one year.

77. The carry forward proposals for each Directorate were initially considered at Directorate Leadership Team meetings in April or May 2010. Annex 2a sets out the final over and underspends for each Service Area and shows the total proposed carry forwards after taking account of virements between service areas. Virements of underspends to different budget heads are requested in Annex 2b. As noted in paragraphs 40 and 48 some of the virements for Children, Young People & Families and Social & Community Services are larger than £0.5m and require approval by Council under the authority's Financial Regulations.
78. Taking into account overspends of +£2.749m that are proposed to be carried forward to be recovered in future years the total underspend available to carry forward is -£3.795m. The net total of -£1.046m is consistent with the underspend shown in column 12 of Annex 1 and the table at paragraph 7. The following table summarises the proposed carry forwards by Directorate whilst the detailed requests are set out by Directorate in Annex 2a.

Directorate/Service Area	Overspends to be carried forward £m	Approved underspends to be carried forward £m	Net total requested to be carried forward £m
Children, Young People & Families	+0.304	-1.708	-1.404
Asylum Seekers	+0.629		+0.629
City Schools Reorganisation	+0.775		+0.775
Total CYP&F	+1.708	-1.708	0.000
Social & Community Services		-0.305	-0.305
Adult Learning	+0.233		+0.233
Music Service	+0.122		+0.122
OP & PD Pooled Budget ⁹	+0.686		+0.686
Total S&CS	+1.041	-0.305	+0.736
Environment & Economy		-0.406	-0.406
Community Safety		-0.805	-0.805
Corporate Core		-0.571	-0.571
Total (as per Annex 2a)	+2.749	-3.795	-1.046

Strategic Measures

79. The year end position on the Strategic Measures budget is an underspend of -£0.649m. This includes an underspend of -£0.442m on the interest paid on various sums which are included within the Council's cash balance, including Developer Contributions. This is mainly due to the 7 day rate and Baxter Index (on which the interest amounts are calculated) being lower than anticipated in the budget. Interest earned on temporary surplus cash balances was -£0.300m higher than budgeted for. This is due to higher than

⁹ overspend to be carried forward and recovered within the Pool in 2010/11.

expected balances at the start of the financial year when interest rates were higher and a better than expected performance from our external fund managers. These were partly offset by an overspend of +£0.255m due to higher than budgeted principal repayments and interest paid on the outstanding debt. The net underspend has been added to balances.

80. The Provisional Outturn Report for 2008/09 included an amount which represented the element of potential lost deposit and associated interest on amounts placed with Landsbanki. At present Local Authority deposits with Landsbanki have "Preferred Creditor status". If this position is held, following the legal case currently being heard in Iceland, then the Council expects to receive 95% of the original deposit back in instalments over the next eight financial years. If not, it is expected the Council will receive 38% of the original deposit over the next eight financial years. CIPFA recommend that Local Authorities base their estimated impairments on the assumption that we will continue to be eligible for "Preferred Creditor status". The 2009/10 accounts therefore show an impairment of 5p in every £1.00.
81. The Treasury Management Outturn report for 2009/10, which covers all of the related activities in detail, will be considered by Cabinet on 20 July 2010.

Bad Debt Write Offs

82. For the year ended 31 March 2010 there were 462 debts written off (as recorded on SAP) totalling £0.046m. Of these the largest write off was £13,000 relating to a direct payment which was approved by Cabinet in February 2010. In addition Client Finance wrote off £0.068m in respect of 115 debts relating to care provided by Social & Community Services. The largest of these debts was £8,763. Most of the debts have been written off because it is uneconomical to recover through the courts. during the year. A further write off of £0.111m relates to an overpayment to Sedgemoor Children's Services. Cabinet agreed to write off this debt in January 2010.
83. After taking account of ad hoc write offs of £0.005m, total write offs for the year were £0.230m.

Specific & Area Based Grants

84. Details of specific government grants and Area Based Grant received in 2009/10 and the associated expenditure are included at Annex 3a.

	Specific Grants £m	Area Based Grant £m
Grants expected to be received in 2009/10 (as per published Medium Term Service & Financial Plan)	420.404	26.950
Grant income carried forward from 2008/09	9.174 ¹⁰	
New grants & changes to 2009/10 allocations previously reported (as per February 2010 Financial Monitoring report)	18.119	0.108
Changes to 2009/10 grant allocations not previously reported but included at Outturn	5.399	
Total Grant funding available for 2009/10	453.096	27.058
2009/10 Grant Expenditure	443.487	25.577
Balance remaining at 31 March 2010	9.609	1.481

Specific Grants

85. Receipts in advance totalling £10.662m have been raised and include £5.569m relating to Standards Fund grant within CYP&F. In S&CS £0.837m relates to Supporting People grant and £1.148m is Social Care Reform Grant. The funding will be carried forward and used in 2010/11.
86. £2.101m Dedicated Schools Grant has been used to support the overall CYP&F position as noted in paragraph 38.

Area Based Grant

87. The variation of £1.481m relates to CYP&F, where £0.188m is requested to be carried forward to meet commitments relating to Connexions in 2010/11 (see paragraph 11). The take up of Extended Rights to Free Travel was much lower than expected and £0.319m has been used to support the overall Directorate position along with £0.848m of School Development Grant (see paragraph 29).

Savings

88. The table shows the total budgeted savings for each Directorate and compares this to the actual outturn. Annex 8 provides a further breakdown by Service Area and, where material, an explanation of the variance. The final position on savings which can be classed as Value for Money (VfM) will be reported to Communities and Local Government (CLG) in July 2010. Whilst the savings are shown in isolation here they are also included in the overall position reported and need to be considered in that context.

¹⁰ £8.710m reported at 2008/09 year end and throughout 2009/10. CYP&F total increased by £0.464m at outturn to match corrected position.

Directorate	Total Budgeted Saving £m	Actual Saving £m	Variation to Budgeted Saving £m
CYP&F	-2.955	-2.335	0.620
S&CS	-11.050	-10.101	0.949
E&E	-5.224	-5.427	-0.203
CS&SS	-0.885	-0.885	0.000
Corporate Core	-1.512	-0.874	0.638
TOTAL	-21.626	-19.622	2.004

89. CYP&F achieved savings of £2.335m. Of the £0.620m variation to their budgeted saving, £0.304m relates to savings to be made as a result of the directorate restructuring. As there are still costs associated to the restructuring to be repaid (see paragraph 36) it was not possible to make the savings in 2009/10. Savings of £0.562m were achieved within Children & Families despite the additional pressure on services in 2009/10. Young People and Access to Education made savings of £1.113m, but were unable to make planned savings of £0.181m from DSG funded services.
90. S&CS made savings of £10.101m. There is a shortfall of £0.949m compared to a target of £10.031m in Adult Social Care where savings have been delayed or have proved unachievable in a number of areas.
91. E&E have achieved -£0.203m more savings than budgeted. Within Transport the Park & Ride ancillary income target of £0.250m was not realised and there is also a shortfall of £0.320 within Property Services due to an overspend on Repairs and Maintenance. However, additional savings of -£0.831m within Sustainable Development, relating to Waste Management and the reduced level of tonnage disposed of, have offset this.
92. The £0.885m savings target for CS&SS has been achieved in full. Of this £0.773m relates to Shared Services savings and represents the balance of the business case target of £4.5m.
93. Within Corporate Core ICT achieved an efficiency saving of £0.243m from a target of £0.881m resulting in the overall directorate shortfall of £0.638m. This relates to ICT.

Part – 2 Consolidated Provisional Capital Outturn

Summary Programme Expenditure

94. The capital programme is updated three times each year. The original programme for the year is agreed by Council in the February preceding the start of the financial year as part of the MTFP (February 2009). This was based on the position forecast at the end of December 2008. The latest programme, based on the position forecast at the end of December 2009, was agreed by Council on 9 February 2010.
95. The summary outturn position compared to both the original and latest capital programme and also the latest position forecast at the end of February 2010 is shown in the table on the next page. For completeness year end accounting adjustments are summarised as other adjustments but included in detail in Annex 10.

Directorate	Original Capital Prog (Feb 2009 Council)	Latest Capital Prog (Feb 2010 Council)	Latest Forecast Position (April 2010 Cabinet)	Actual Spend 2009/10	Variation to Original Capital Programme		Variation to Latest Capital Programme		Variation to February Forecast	
	£m	£m	£m		£m	%	£m	%	£m	%
CYP&F	38.5	38.8	38.0	35.6	-2.9	-7	-3.2	-8	-2.4	-6
S&CS	7.9	6.0	5.4	5.0	-2.9	-37	-1.0	-17	-0.4	-7
E&E – Transport	26.4	24.8	23.4	23.1	-3.3	-13	-1.7	-7	-0.3	-2
E&E– Other	15.1	16.3	15.7	15.0	-0.1	-1	-1.3	-8	-0.7	-4
CS&SS	0.3	1.0	0.7	0.7	+0.4	178	-0.3	-32	0.0	-4
Corporate Core	1.0	2.9	2.9	2.9	+1.9	100	0.0	0	0.0	0
Directorate Total	89.2	89.8	86.1	82.3	-6.9	-8	-7.5	-8	-3.8	-4
Schools Capital	11.2	12.1	12.1	11.7	0.5	4	-0.4	-3	-0.4	-3
Total Capital Programme Expenditure	100.4	101.9	98.2	94.0	-6.4	-6	-7.9	-8	-4.2	-4
Other adjustments ¹¹	1.7	2.0	2.0	6.8						
Total Capital Expenditure	102.1	103.9	100.2	100.8						

¹¹ Detail shown in Annex 10.

96. Total capital programme expenditure for 2009/10 was £94.0m and the variation between the original programme (February 2009 Council) and the final outturn was -£6.4m. This represents 94% use of resources compared to the original capital programme and compares favourably to the outturn position in 2008/09 where the use of resources was 90% and the 82% achieved in 2007/08.
97. The variation between the latest programme (agreed at 9 February 2010 Council) and the final outturn was -£7.9m or 8%. -£7.5m of this variation is attributable to the directorate programme and -£0.4m to schools capital/devolved formula. The variation compared to the latest forecast position was -£4.2m or 4%.
98. Further comments explaining the key movements within each directorate are set out below. A detailed analysis of the variations by scheme is shown in Annex 10.

Children, Young People & Families

99. Total capital expenditure was £35.6m (excluding schools local capital expenditure of £11.7m), a variation of -£2.9m or -7% compared to the original capital programme. The main changes relate to the following projects/programmes:
- Launton £0.8m - temporarily delayed pending outcome of primary locality review process.
 - Woodstock, Marlborough (Science) £1.6m - slippage due to environmental issues and scheme being divided into 3 phases.
 - Chipping Norton (Science) £1.0m - prolonged negotiations in the design and tendering processes.
 - Thornbury House Children Home £0.5m - delayed due to environmental issues, project slipped to 2010/11. Further delays incurred due to extended cold weather period in undertaking Great Crested Newt trapping and new access right complications.
 - Flexibility of Childcare Programme £1.9m - due to the setting of unrealistic timescales to agree individual projects including the approval process and funding agreement with external providers.
100. The overall programme was compensated by the Oxford Academy scheme of £2.3m due to financial profiling.
101. Compared to the latest Capital Programme there was an underspend of -£3.1m or -8%. This includes a reduction of -£2.4m or -6% since the last forecast. This was due to:
- Slippage not forecast on the schemes listed above - Chipping Norton (£0.3m) and Flexibility of Childcare Programme (£0.2m).
 - Poor weather conditions delaying progress - Charlton-on-Otmoor (£0.2m) and Woodstock, Marlborough - Science (£0.3m).
 - Underspends on numerous schemes in the retention part of the programme (£0.5m).
 - Bayard's School £0.2m - delayed due the extended consultations to planning objections despite earlier positive consultation.

Social & Community Services

102. Total capital expenditure for the year was £5.0m. The variation compared to the original Capital Programme was a reduction of -£2.9m or -37%. This was due to delays on several projects including:
- Museums Resource Programme £0.4m - delayed due to planning.
 - Bicester Care Home £0.4m - delays caused by newts, badgers, wet weather and drainage.
 - Learning Disabilities - supported living programme £0.3m – work on this scale has not been done and expectations of how much could be delivered were too high.
 - Abingdon Resource Centres £0.4m - delay to the start of Phase 3 due to need to reduce project costs to stay within budget
 - Adult Social Care system review £0.7m - delayed due to resource being required to work on other urgent projects.
103. The variation compared to the latest Capital Programme was a reduction of -£1.0m or -17%.

Environment & Economy - Transport

104. Total capital expenditure was £23.1m. This was £3.3m or 13% less than the original Capital Programme. This reflects a £4.7m or 35% reduction on the Integrated Transport Strategy (ITS) element of the programme offset by an increase in the Highways Maintenance programme of £1.0m or 8%.
105. The large variation on the ITS programme is mainly due to the re-profiling of the Didcot Station Forecourt project which reduced the 2010/11 forecast by £3.5m. Other changes in the ITS programme were due to delays to design processes following public consultations (London Rd Phase 3, Controlled Parking Zones, Highfield Area Traffic Management and Fairfax Road cycle link).
106. There was an increase in available resources for Highways Maintenance of £2.2m due to additional Transport Asset Management Plan (TAMP) and detrunking grants and the use of £1.5m accelerated funding. This was fully utilised in year to bring forward area maintenance schemes and principal road design work but partly offset by an underspend of £1.6m (57%) on the bridges programme.
107. The variation compared to the latest Capital Programme was a reduction of £1.7m or 7%. £0.9m of that related to the bridges programme as set out above.

Environment & Economy - Other

108. Total capital expenditure was £14.9m. The variation compared to the original Capital Programme was a reduction of £0.1m or 1%.
109. The main changes to the original programme for 2009/10 were a reduction of £0.8m on the clearance on fly tipped waste at Redbridge Hollow due to a significantly lower tender price than anticipated. This was offset by the

inclusion of an additional £1m of accelerated funding for Backlog Maintenance.

110. The variation compared to the latest Capital Programme was a reduction of £1.3m or 8%.

Community Safety & Shared Services

111. Total capital expenditure was £0.68m. The variation compared to the original Capital Programme is an increase of £0.4m or 178%. The main changes to the original programme for 2009/10 were the inclusion of Safer Stronger Communities Grant (£0.2m), which is passed over to district councils, and the school kitchen & dining improvement programme (£0.4m). The funding for these two schemes was not announced until after the original programme was set.
112. The variation compared to the latest Capital Programme is a reduction of £0.3m or 32%. Some minor projects were re-profiled to 2010/11 in the last quarter of the year as work had not yet commenced.

Corporate Core

113. Total capital expenditure was £2.9m. This was £1.9m higher than originally planned due to the early repayment of SAP and associated software licences, which was brought into the capital programme part way through the year. This will be funded through prudential borrowing and will give a net revenue saving of £0.2m on interest payments from January 2010 to September 2012 when the current contract for SAP support ends.

Capital Programme Financing

114. The table below summarises the outturn financing of the in-year capital programme and compares it to the financing planned in the latest capital programme.

Type of Financing	Original Planned Financing February 2009 £m	Latest Planned Financing February 2010 £m	Outturn Financing 2009/10 £m	Variance to Original Planned Financing £m	Variance to Latest Planned Financing £m
SCE(R) Formulaic Capital Allocations - Credit Approval	27.9	29.7	29.7	+1.8	0.0
SCE(R) Formulaic Capital Allocations – Grant	8.2	4.2	4.5	-3.7	+0.3
Grants & Contributions	48.7	50.0	52.0	+3.3	+2.0
Revenue Funding	0.6	1.3	1.2	+0.6	-0.1
Prudential Borrowing	8.8	9.8	8.7	-0.1	-1.1
Capital Receipts	7.6	6.9	0.0	-7.6	-6.9
Total Capital Programme Financing	101.8	101.9	96.1	-5.7	-5.8
Revenue Funding of year end adjustments			4.7		
TOTAL			100.8		

115. Use of other grants and contributions has been maximised and consequently there was a reduced level of prudential borrowing required (closer to the original amount planned) and no draw down of capital balances.
116. The number of property disposals for the year was 7 with a total value of £7.3m. There were 11 receipts with a total estimated value of £7.2m forecast in the original disposals programme for 2009/10. 8 of these receipts with a total estimated value of £6.6m slipped to future years. However, 3 receipts totalling £6.0m slipped from 2008/09 into 2009/10.
117. A repayment of £3.0m from Shared Services into the capital reserve was brought forward to 2009/10.
118. Advice from our external auditors is that Homes for Older People (HOPs) lease premiums should have been treated as revenue pre-payments rather than capital receipts in prior years. An adjustment has been made to reduce unapplied capital receipts by £9.0m in 2009/10. The lease premiums relating to prior years have been added to the capital reserve (£2.9m). The remaining £6.1m will be replaced by prudential borrowing funded by future lease premiums.

Part 3 – Balance Sheet

General Balances

119. There have been a number of changes affecting the Council's general balances during the year. These have been reported as part of the monthly financial monitoring reports to Cabinet and are shown in full at Annex 5.
120. The provisional outturn position for general balances is £11.145m (after the planned City Schools overspend) as at 31 March 2010. In addition the revenue element of the Performance Reward Grant of £2.017m that will be distributed in 2010/11 has been accounted within balances taking the total to £13.162m.
121. As part of the 2010/11 budget agreed by Council on 9 February 2010 £1.975m has been added to balances in 2010/11 to bring the £10.5m estimated balance at 31 March 2010 back to the risk assessed level of £12.5m.
122. Cabinet is recommended to agree the changes to general balances since the last monitoring report as shown in the table on the next page.

	£m
Forecast position per February monitoring report (net of City Schools)	+10.578
Net calls on balances variations outside Directorates' control (para 8)	-0.062
Variation on Strategic Measures (para 79)	+0.649
Reduction in Provision for doubtful debts (impairment allowance) and other final accounts adjustments	-0.020
Total Balances Available 31 March 2010	+11.145
Add Local Area Agreement (LAA) Performance Reward Grant accounted for in 2009/10	+2.017
Total Balances (net of City Schools) 31 March 2010	+13.162

Earmarked Reserves

123. Details of the movements on earmarked reserves in 2009/10 are set out in Annex 4 and summarised in the table below:

	2009/10			
	Balance 1 April 2009 £m	Forecast Movement Contributions From Reserve £m	Contributions To Reserve £m	Balance 31 March 2010 £m
CYP&F	15.049	-12.786	12.064	14.327
S&CS	2.739	-1.635	0.590	1.694
E&E	3.878	-1.759	3.497	5.616
CS&SS	4.502	-5.773	5.304	4.033
Corporate Core	4.872	-2.001	0.258	3.129
Corporate	21.305	-7.305	17.965	31.965
Total	52.345	-31.529	39.678	60.764

Children, Young People & Families

124. In 2008/09 £1.0m was placed in the CYP&F General Reserve for use against Children's Social Care. In addition £0.523m of the carry forward from 2008/09 was added to the reserve during 2009/10. At the year end the whole reserve was drawn down and used to offset pressures relating to placements and asylum seekers (see paragraphs 15 and 20).
125. During the year a number of new reserves have been created. These are Building Schools for the Future (£0.042m), Oxfordshire Rural Children's Centre (£0.008m), Safeguarding Board (£0.075m), Youth Support Service – Computer System (£0.075m) and residential centres (£0.016m).

School Balances

126. All schools need to retain a certain level of balances and the above figures are a mixture of committed balances, allowable uncommitted balances and

excess balances The movement in school balances¹² from 2008/09 to 2009/10 is as follows:

	Balances 31 March 2009	Movement	Balances 31 March 2010
	£m	£m	£m
Primary Schools	8.873	-1.547	7.326
Secondary Schools	2.414	-0.195	2.219
Special Schools	1.769	-0.622	1.147
TOTAL	13.056	-2.364	10.692

127. The number of schools with deficits and surpluses and the total value is:

	Number of Schools 31 March 2009		Change		Number of Schools 31 March 2010	
	Deficit Balance	Surplus Balance	Deficit Balance	Surplus Balance	Deficit Balance	Surplus Balance
Primary	37	207	4	-4	41	203
Secondary	10	22	1	-1	11	21
Special	0	13	1	-1	1	12
Total	47	242	6	-6	53	236

	Balances 31 March 2009		Movement		Balances 31 March 2010	
	Deficit Balance £m	Surplus Balance £m	Deficit Balance £m	Surplus Balance £m	Deficit Balance £m	Surplus Balance £m
Primary	-967	9.840	-0.128	-1,376	-1.095	8.464
Secondary	-1.769	4.183	0.268	-463	-1.501	3.720
Special	0	1.769	-0.032	-590	-0.032	1.179
Total	-2.736	15.792	0.108	-2,429	-2.628	13.363

128. 11 Secondary Schools had a total deficit of £1.501m, and 21 a total surplus of £3.720m. The largest surplus or deficit held by an individual school is as follows:

¹² Balances related to monies held by schools on behalf of partnerships, for example, are excluded.

	Largest Individual Surplus £m	Largest Individual Deficit £m
Primary School	0.228	-0.104
Secondary School	0.645	-0.587
Special School	0.330	-0.032

Reducing Balances in 2010/11

129. During the year, as reported in the financial monitoring report to the end of September 2009, schools estimated their balances at the end of March 2010 to be £5.6m. This suggested that overall balances would reduce by at least £7.4m or by 57%. The actual reduction is £2.3m.
130. A series of protocols have been put in place to improve forecasting in 2010/11. The use of SAP from 1 April 2010 and the introduction of standardised reports and improved processes will also provide more accurate information for 2010/11.

Social & Community Services

131. As reported throughout the year the Adult Learning Reserve of £0.117m has been fully utilised in year to meet part of the overspend.
132. As reported to Cabinet on 16 February 2010, £0.500m of the Section 117 reserve was utilised in year to make an additional contribution to the Older People's and Physical Disabilities Pooled budget. This reserve was set up to meet potential future claims in respect of refunds to clients under the S117 of the Mental Health Act. The balance at 31 March 2010 is £0.273m.
133. An annual contribution of £0.243m has been made to the ICT/Digitisation Project reserve. £0.223m has been utilised in year.
134. The £0.650m balance on the Pooled Budget reserve as at 1 April 2009 was utilised in year. A contribution of £0.101m has been made in respect of the underspend on the Learning Disabilities Pool at year end.
135. A new reserve (£0.048m) has been created to hold unutilised balances on personal budgets under Self Directed Support.

Environment & Economy

136. As noted in paragraph 58, Waste Management underspends of - £0.943m have been transferred to reserves. This is in addition to £0.695m budget not required for the purchase of LATS credits in 2009/10. The total contribution to the reserve is £1.681m, increasing the total available to fund the Waste Recycling Centre Strategy to £2.516m. New reserves have been created for Carbon Reduction (£0.060m), Transport (£0.250m), and Tourism Signs (£0.089m).

137. Annex 6 shows the movement on the On – Street Parking Account. The table below shows the movement on the On and Off – Street Parking accounts and reflects the contributions to and from reserve shown in Annex 4.

	£m
Parking Account balance 31 March 2009	1.847
Less drawdowns and the cost of Off-Street Parking (contribution from reserve).	-1.396
Net 2009/10 On-Street Parking Surplus (contribution to reserve) ¹³	1.126
Estimated Parking Account balance 31 March 2010	1.577
Parking Account movement	-0.270

Community Safety & Shared Services

138. The Shared Services Funding Reserve was opened in 2006/07 with a starting balance of £4.224m transferred from the capital programme. £3m has been repaid this year and the balance of £1.224m will be repaid in March 2011.
139. The movements in the Food with Thought Reserve include the surpluses and deficit transferred from the trading accounts and other funding from reserves. This included a contribution of £0.268m to the capital programme for the refurbishment of school kitchens and dining areas.
140. Two new reserves have been created. Securing Water Supplies (£0.027m) has been set up by Fire & Rescue to manage fluctuations from year to year in expenditure on fire hydrant repairs. Shared Services has created a Development Reserve (£0.142m) to provide funding for system development work to facilitate further continuous improvement and efficiency savings.

Corporate Core

141. The following table summarises movements in the Change Fund:

	£m
Total fund 1 April 2009	1.055
Budget 2009/10	0.806
Total funds	1.861
Expenditure on projects 2009/10	0.602
Balance 31 March 2010	1.259

Sixteen projects were financed by the Change Fund in 2009/10 and a further £1.241m is committed to these projects for 2010/11 onwards.

142. £0.261m of the Elections Reserve was used to fund the cost of the 2009 council election and to contribute to the IT and training costs of newly elected members.
143. The ICT reserves were used to fund the development of IT in schools (£0.362m), the SAP for Schools project (£0.160m). The £0.807m balance of the IT Development Fund which was transferred to reserves in 2008/09, and

¹³ Expenditure of £2.657m and income of £3.783m in 2009/10.

was the remaining balance of the £3m fund set up for major ICT projects was fully utilised in 2009/10, along with £0.298m savings arising from the re-negotiated contract for SAP maintenance and support.

144. A new reserve has been created in Finance & Procurement for the CIPFA trainee scheme (£0.013m).

Corporate Reserves

145. As part of the 9 February 2009 Service & Resource Planning report, Council agreed to the creation of a new reserve from 2009/10 for Local Authority Business Growth Incentive (LABGI) funding. After taking account of funding unused at the end of 2009/10, which has been transferred back to the reserve, the total balance as at 31 March 2010 is £0.791m. This will be used in 2010/11 and future years as set out in the MTFP for 2010/11 – 2014/15.
146. At the end of 2008/09 balances were £1.187m higher than the risk assessed level. The surplus was agreed to be transferred to a new Efficiency Savings Reserve to contribute to future efficiency savings or to fund costs associated with those savings. During 2009/10 a further 0.694m relating to excess Green Book and Chief Officer pay inflation was removed from Directorate budgets and added to this reserve. As set out in paragraph 67, £0.362m has been used to fund redundancy costs in ICT. The balance as at 31 March 2010 was £1.519m.

Provisions

Social & Community Services

147. The Older People's Pool provision which was set up to deal with a liability resulting from a backlog in the processing of Continuing Care Clients has been reduced as clients have been dealt with. £0.563m has been utilised in 2009/10 and the balance was £0.756m as at 31 March 2010.
148. £0.113m of the Section 117 provision has been utilised in year. The remaining provision has been reviewed and the remaining balance of £0.013m has been transferred to the Section 117 Reserve.

Community Safety and Shared Services

149. As a result of an Employment Tribunal decision with respect to a wide range of issues affecting payments to retained firefighters, the Fire & Rescue Service has created a provision of £0.225m for the cost of compensation payments, backdated to July 2000.

RECOMMENDATIONS

150. **The Cabinet is RECOMMENDED to:**
- (a) **note the provisional revenue and capital outturn set out in the report;**
 - (b) **approve the carry-forwards and virements as set out in Annex 2;**

- (c) **recommend Council to approve the virements greater than £0.5m for Children, Young People & Families and Social & Community Services Directorates as set out in Annex 2b;**
- (d) **approve the changes to balances as set out in the table at paragraph 122;**
- (e) **agree that the surplus in the On-Street Parking Account at the end of the 2009/10 financial year, so far as not applied to particular eligible purposes in accordance with Section 55(4) of the Road Traffic Regulation Act 1984, be carried forward in the account to the 2010/11 financial year (paragraph 137); and**
- (f) **approve the creation of new reserves as set out in Annex 4 and paragraphs 125, 135, 136, 140 and 144.**

SUE SCANE

Assistant Chief Executive & Chief Finance Officer

Background papers: Directorate reports

Contact Officers: Kathy Wilcox, Principal Financial Manager
Tel: 01865 323981

Lorna Baxter, Assistant Head of Finance (Corporate Finance)
Tel: 01865 323971

June 2010

PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010

Annex 1

Budget Book Ref	Service Area	BUDGET 2009/10					OUTTURN			Analysis of variation			Proposed Carry Forward to 2010/11 (**) Surplus - Deficit + £000 (12)	
		Original Budget £0 (3)	Brought Forward from 2008/09 Surplus + Deficit - £000 (4)	Virements to Date £000 (5)	Supplementary Estimates to Date £000 (6)	Latest Estimate £000 (7)	Provisional Outturn (Actual per SAP) £000 (8)	Variation to Final Budget underspend - overspend + £000 (9)	Returned to Council underspend - overspend + £000 (10)	This Directorate (*) underspend - overspend + £000 (11)				
(1)	(2)													
	Children, Young People & Families													
	Gross Expenditure	502,002	-867	14,505	300	515,940	571,181	55,241	0	55,241				
	Income	-403,725	0	-15,142	215	-418,652	-473,893	-55,241	0	-55,241				
	Net Expenditure	98,277	-867	-637	515	97,288	97,288	0	0	0				0
	Social and Community Services													
	Gross Expenditure	212,820	1,094	-1,363	0	212,551	217,619	5,068	0	5,068				
	Income	-46,394	0	614	0	-45,780	-50,112	-4,332	0	-4,332				
	Net Expenditure	166,426	1,094	-749	0	166,771	167,507	736	0	736				736
	Supporting People													
	Gross Expenditure	12,571	0	125	0	12,696	13,352	656	0	656				
	Income	-12,197	0	-125	0	-12,322	-12,978	-656	0	-656				
	Net Expenditure	374	0	0	0	374	374	0	0	0				0
	Environment & Economy													
	Gross Expenditure	98,435	966	1,710	1,060	102,171	103,301	1,130	115	1,015				
	Income	-29,804	0	-1,138	0	-30,942	-32,363	-1,421	0	-1,421				
	Net Expenditure	68,631	966	572	1,060	71,229	70,938	-291	115	-406				-406
	Community Safety & Shared Services													
	Gross Expenditure	54,024	820	417	0	55,261	57,858	2,597	167	2,430				
	Income	-24,116	0	-547	0	-24,663	-27,898	-3,235	0	-3,235				
	Net Expenditure	29,908	820	-130	0	30,598	29,960	-638	167	-805				-805
	Corporate Core													
	Gross Expenditure	35,212	415	-149	2,310	37,788	44,371	6,583	-220	6,803				
	Income	-25,786	0	574	0	-25,212	-32,586	-7,374	0	-7,374				
	Net Expenditure	9,426	415	425	2,310	12,576	11,785	-791	-220	-571				-571
	Less recharges to other Directorates	-61,489				-61,489	-61,489	0		0				
		61,489				61,489	61,489	0		0				
	Directorate Expenditure Total	853,575	2,428	15,245	3,670	874,918	946,193	71,275	62	71,213				
	Directorate Income Total	-480,533	0	-15,764	215	-496,082	-568,341	-72,259	0	-72,259				
	Directorate Total Net	373,042	2,428	-519	3,885	378,836	377,852	-984	62	-1,046				-1,046

Less: City Schools Reorganisation
In-Year Directorate Variation

	-775
	-1,759

Contributions to/from Reserves	3,432	-2,428	693	-3,885	1,697	4,413	2,716
Contribution to/from Balances	-5,131				-9,016	-5,111	3,905
Capital Financing	35,811				35,811	35,828	17
Interest on Balances	-1,034		-65		-1,099	-1,809	-710
Strategic Measure Budget	33,078	-2,428	628	-3,885	27,393	33,321	5,928
Area Based Grant (income)	-26,950		-109		-27,059	-27,059	0
Budget Requirement	379,170	0	0	0	379,170	384,114	4,944

Increase/(decrease) in County Fund **-2,488**

* This is a combined position as any Directorate over or under spend at the year-end has been included in the County Fund Balance

Combined position - Budget Requirement and movement on County Fund Balance **381,626**

Total External Financing to meet Budget Requirement							
Revenue Support Grant	19,657				19,657	19,657	0
Business rates	85,163				85,163	85,163	0
Council Tax	274,350				274,350	274,350	0
Other Income (e.g. LAA, PRG, LABGI)					0	2,456	2,456
External Financing	379,170	0	0	0	379,170	381,626	2,456

CY1	Young People & Access to Education	14,524				14,524	14,537	13
CY2	Children & Families	17,310				17,310	17,482	172
CY3	Raising Achievement Service	1,620				1,620	1,620	0
CY4	Commissioning, Performance & Quality Ass	4,934				4,934	4,934	0
CY5	Schools (incl Non Devolved Schools Costs)	278,766		4,523		283,289	281,188	-2,101
	Total Gross	317,154	0	4,523	0	321,677	319,761	-1,916

DIRECTORATE: SOCIAL & COMMUNITY SERVICES

Annex 1b

PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010

Budget Book Ref	Division of Service	BUDGET 2009/10						OUTTURN			Analysis of variation		Proposed Carry Forward to 2010/11 Surplus - Deficit + £000 (12)		
		Original Budget	Brought Forward from 2008/09 Surplus + Deficit - £000 (4)	Virements to Date	Supplementary Estimates to Date	Latest Estimate	£000 (3)	£000 (5)	£000 (6)	£000 (7)	Provisional Outturn (Actual per SAP) £000 (8)	Variation to Final Budget underspend + overspend + £000 (9)		Returned to Council underspend + overspend + £000 (10)	This Directorate (*) underspend - overspend + £000 (11)
(1)	(2)														
SC1	Community Services														
	Gross Expenditure	22,704	88	-840		21,952				23,647	1,695			1,695	
	Income	-10,117		839		-9,278				-10,662	-1,384			-1,384	
		12,587	88	-1	0	12,674				12,985	311	0	311	311	325
SC2	Social Care for Adults														
	Gross Expenditure	171,891	843	661		173,395				178,365	4,970			4,970	
	Income	-42,898		-623		-43,521				-48,073	-4,552			-4,552	
		128,993	843	38	0	129,874				130,292	418	0	418	418	411
SC3	Major Projects (excluding Supporting People)														
	Gross Expenditure	357		-47		310				335	25			25	
	Income	-190		47		-143				-167	-24			-24	
		167	0	0	0	167				168	1	0	1	1	0
SC4	Strategy and Transformation														
	Gross Expenditure	28,650	163	-1,137		27,676				27,868	192			192	
	Income	-3,971		351		-3,620				-3,806	-186			-186	
		24,679	163	-786	0	24,056				24,062	6	0	6	6	0
	Less recharges within directorate	-10,782				-10,782				-12,596	-1,814			-1,814	
		10,782				10,782				12,596	1,814			1,814	
	Directorate Expenditure Total	212,820	1,094	-1,363	0	212,551				217,619	5,068	0	5,068	5,068	0
	Directorate Income Total	-46,394	0	614	0	-45,780				-50,112	-4,332	0	-4,332	-4,332	0
	Directorate Total Net	166,426	1,094	-749	0	166,771				167,507	736	0	736	736	736
SC3.4	Supporting People														
	Gross Expenditure	12,571		125		12,696				13,352	656			656	
	Income	-12,197		-125		-12,322				-12,978	-656			-656	
	Net Expenditure	374	0	0	0	374				374	0	0	0	0	0
	Directorate Total	166,800	1,094	-749	0	167,145				167,881	736	0	736	736	736

Pooled Budget Memorandum Accounts

	OCC Contribution	Health Contribution	Gross Contribution	Brought Forward from 2008/2009	Net Budget	Forecast Outturn	Variation to Final Budget	Final Variation OCC	Final Variation PCT
Older People's Pooled Budgets	81,622	27,192	108,814	1,130	109,944	113,056	3,112	52	3,060
Physical Disabilities Pooled Budget	7,144	3,259	10,403	0	10,403	8,954	-1,449	561	-2,010
Equipment Pooled Budget	1,346	312	1,658	0	1,658	2,101	443	177	266
Older People's, Physical Disabilities and Equipment Pooled Budget	90,112	30,763	120,875	1,130	122,005	124,111	2,106	790	1,316
Learning Disabilities Pooled Budget	42,903	31,186	74,089	0	74,089	73,988	-101	-101	0

Note: Contribution to the pool are shown within gross expenditure figures above for relevant division of service

DIRECTORATE: ENVIRONMENT & ECONOMY
PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010

Annex 1c

Budget Book Ref (1)	Directorate (2)	BUDGET 2009/10					OUTTURN		Analysis of variation		Proposed Carry Forward to 2010/11 (**) Surplus - Deficit + £000 (12)
		Original Budget £0 (3)	Brought Forward from 2008/09 Surplus + Deficit - £000 (4)	Virements to Date £000 (5)	Supplementary Estimates to Date £000 (6)	Latest Estimate £000 (7)	Provisional Outturn (Actual per SAP) £000 (8)	Variation to Final Budget underspend - overspend + £000 (9)	Returned to Council underspend - overspend + £000 (10)	This Directorate (*) underspend - overspend + £000 (11)	
EE1	Transport	49,704	108	1,472	900	52,184	53,114	930	2	928	
	Gross Expenditure	-9,687		-784		-10,471	-11,497	-1,026		-1,026	
	Income	40,017	108	688	900	41,713	41,617	-96	2	-98	-95
EE2	Sustainable Development	27,556	739	156		28,451	28,283	-168	-4	-164	
	Gross Expenditure	-2,763		-376		-3,139	-3,541	-402		-402	
	Income	24,793	739	-220	0	25,312	24,742	-570	-4	-566	-253
EE3	Property Services	18,293	115	90	160	18,658	18,949	291	117	174	
	Gross Expenditure	-19,584		20		-19,564	-19,619	-55		-55	
	Income	-1,291	115	110	160	-906	-670	236	117	119	-58
EE4	Business Support	5,224	4	-8		5,220	5,364	144		144	
	Gross Expenditure	-112		2		-110	-115	-5		-5	
	Income	5,112	4	-6	0	5,110	5,249	139	0	139	0
	Less recharges within Directorate	-2,342				-2,342	-2,409	-67		-67	
		2,342				2,342	2,409	67		67	
	Directorate Expenditure Total	98,435	966	1,710	1,060	102,171	103,301	1,130	115	1,015	
	Directorate Income Total	-29,804	0	-1,138	0	-30,942	-32,363	-1,421	0	-1,421	
	Directorate Total Net	68,631	966	572	1,060	71,229	70,938	-291	115	-406	-406

DIRECTORATE: COMMUNITY SAFETY & SHARED SERVICES

Annex 1d

PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010

Budget Book Ref	Service Area	BUDGET 2009/10						OUTTURN			Analysis of variation		Proposed Carry Forward to 2010/11 Surplus - Deficit + £000 (12)			
		Original Budget £0 (3)	Brought Forward from 2008/09 Surplus + Deficit - £000 (4)	Virements to Date £000 (5)	Supplementary Estimates to Date £000 (6)	Latest Estimate £000 (7)	Provisional Outturn (Actual per SAP) £000 (8)	Variation to Final Budget underspend - overspend + £000 (9)	Returned to Council underspend - overspend + £000 (10)	This Directorate (*) underspend - overspend + £000 (11)						
(1)	(2)															
CS1	Fire & Rescue Service															
	Gross Expenditure	24,174	279	-30		24,423		24,423	24,507	84		167	-83		-117	
	Income	-616		1		-615		-615	-617	-2			-2		-117	
	Net Expenditure	23,558	279	-29	0	23,808		23,808	23,890	82		167	-85		-117	
CS2	Emergency Planning Service															
	Gross Expenditure	384	15	-1		398		398	363	-35			-35		-35	
	Income	0				0		0		0			0		0	
	Net Expenditure	384	15	-1	0	398		398	363	-35		0	-35		-35	
CS3	Safer Communities Unit															
	Gross Expenditure	886	15	-1		900		900	1,021	121			121		-7	
	Income					0		0	-117	-117			-117		-7	
	Net Expenditure	886	15	-1	0	900		900	904	4		0	4		-7	
CS4	Traveller Sites															
	Gross Expenditure	496		452		948		948	911	-37			-37			
	Income	-283		-452		-735		-735	-772	-37			-37			
	Net Expenditure	213	0	0	0	213		213	139	-74		0	-74		0	
CS5	Trading Standards															
	Gross Expenditure	2,656	75	-11		2,720		2,720	2,793	73			73		-19	
	Income	-206				-206		-206	-267	-61			-61		-19	
	Net Expenditure	2,450	75	-11	0	2,514		2,514	2,526	12		0	12		-19	
CS6	Shared Services															
	Gross Expenditure	28,956	436	208		29,600		29,600	32,522	2,922			2,922		-627	
	Income	-26,539		-296		-26,835		-26,835	-30,384	-3,549			-3,549		-627	
	Net Expenditure	2,417	436	-88	0	2,765		2,765	2,138	-627		0	-627		-627	
	Less recharges within Directorate	-3,528		-200		-3,728		-3,728	-4,259	-531			-531			
		3,528		200		3,728		3,728	4,259	531			531			
	Directorate Expenditure Total	54,024	820	417	0	55,261		55,261	57,858	2,597		167	2,430		-805	
	Directorate Income Total	-24,116	0	-547	0	-24,663		-24,663	-27,898	-3,235		0	-3,235		0	
	Directorate Total Net	29,908	820	-130	0	30,598		30,598	29,960	-638		167	-805		-805	

DIRECTORATE: CORPORATE CORE

Annex 1e

PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010

Budget Book Ref	Service Area	BUDGET 2009/10					OUTTURN			Analysis of variation		Proposed Carry Forward to 2010/11 (**) Surplus - Deficit + £000 (12)
		Original Budget £0 (3)	Brought Forward from 2008/09 Surplus + Deficit - £000 (4)	Virements to Date £000 (5)	Supplementary Estimates to Date £000 (6)	Latest Estimate £000 (7)	Provisional Outturn (Actual per SAP) £000 (8)	Variation to Final Budget underspend - overspend + £000 (9)	Returned to Council underspend - overspend + £000 (10)	This Directorate (*) underspend - overspend + £000 (11)		
(1)	(2)											
CC1	Business Support											
	Gross Expenditure	1,361	32	23		1,416	1,386	-30				-174
	Income	-179				-179	-180	-1				
	Net Expenditure	1,182	32	23	0	1,237	1,206	-31	0			-174
CC2	ICT											
	Gross Expenditure	18,428		-29	2,250	20,649	26,611	5,962				
	Income	-18,783		338		-18,445	-24,378	-5,933				
	Net Expenditure	-355	0	309	2,250	2,204	2,233	29	0			0
	Strategic Human Resources & Organisational Development											
	Gross Expenditure	2,657	17	49		2,723	2,838	115				
	Income	-2,622		219		-2,403	-2,735	-332				
	Net Expenditure	35	17	268	0	320	103	-217	0			-170
CC4	Finance & Procurement											
	Gross Expenditure	3,565	44	89		3,688	3,522	-166	-202			
	Income	-3,499		6		-3,493	-3,651	-158				
	Net Expenditure	56	44	95	0	195	-129	-324	-202			
CC5	Legal & Democratic Services											
	Gross Expenditure	5,546	165	-1	60	5,770	7,111	1,341	-18			
	Income	-2,522		-1		-2,523	-3,892	-1,369				
	Net Expenditure	3,024	165	-2	60	3,247	3,219	-28	-18			
CC6	Partnerships											
	Gross Expenditure	913	66	34		1,013	959	-54				
	Income	-833				-833	-849	-16				
	Net Expenditure	80	66	34	0	180	110	-70	0			
CC7	Policy Unit											
	Gross Expenditure	1,652	64	119		1,835	2,115	280				
	Income	-1,472				-1,472	-1,874	-402				
	Net Expenditure	180	64	119	0	363	241	-122	0			

DIRECTORATE: CORPORATE CORE

Annex 1e

PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010

Budget Book Ref	Service Area	BUDGET 2009/10					OUTTURN			Proposed Carry Forward to 2010/11 (**)	
		Original Budget	Brought Forward from 2008/09 Surplus + Deficit - £000 (4)	Virements to Date	Supplementary Estimates to Date	Latest Estimate	Provisional Outturn (Actual per SAP) £000 (8)	Variation to Final Budget underspend + overspend + £000 (9)	Returned to Council underspend + overspend + £000 (10)		This Directorate (*) underspend - overspend + £000 (11)
(1)	(2)	£0 (3)	£000 (4)	£000 (5)	£000 (6)	£000 (7)					
CC8	Communication & Public Affairs										
	Gross Expenditure	844	27	137		1,008	1,008	0		0	-46
	Income	-824				-824	-824	-28		-28	
	Net Expenditure	20	27	137	0	184	184	-28		-28	-46
CC9	Change Fund										
	Gross Expenditure	806		-580		226	226	0		0	
	Income	0				0	0	0		0	
	Net Expenditure	806	0	-580	0	226	226	0		0	0
CC10	Corporate & Democratic Core										
	Gross Expenditure	4,398		22		4,420	4,420	0		0	
	Income	0				0	0	0		0	
	Net Expenditure	4,398	0	22	0	4,420	4,420	0		0	0
	Less recharges within directorates	-4,948		-12		-4,960	-4,960	-865		-865	
		4,948		12		4,960	4,960	865		865	
	Directorate Expenditure Total	35,212	415	-149	2,310	37,788	37,788	6,583	-220	6,803	-571
	Directorate Income Total	-25,786	0	574	0	-25,212	-25,212	-7,374	0	-7,374	0
	Directorate Total Net	9,426	415	425	2,310	12,576	12,576	-791	-220	-571	-571

PROVISIONAL REVENUE OUTTURN 2009/10

Annex 2a

CABINET 22 June 2010

ANALYSIS OF CARRY FORWARD AND PROPOSALS FOR USE OF CARRY FORWARD TO BE APPROVED IN 2009/10: SUMMARY

Budget Book Ref	Service Area	Variation	Same Budget	Different Budget	Virement of Carry Forward	Total proposed Carry Forward	Remaining Carry Forward being returned to balances
(1)	(2)	underspend - overspend + £000 (3)	underspend - overspend + £000 (4)	underspend - overspend + £000 (5)	Other Directorate £000 (7)	Surplus - Deficit + £000 (9)	Surplus - Deficit + £000 (10)
CYPF	Children, Young People & Families	0	0	0	0	0	0
SCS	Social & Community Services	736	736	0	0	736	0
EE	Environment & Economy	-406	-242	-164	0	-406	0
CS	Community Safety & Shared Services	-805	-653	-152	0	-805	0
CC	Corporate Core	-571	-356	-215	0	-571	0
Directorate Total		-1,046	-515	-531	0	-1,046	0

DIRECTORATE: Children, Young People & Families

Annex 2a

PROVISIONAL REVENUE OUTTURN 2009/10
 CABINET 22 June 2010
 ANALYSIS OF CARRY FORWARD AND PROPOSALS FOR USE OF CARRY FORWARD

Budget Book Ref	Service Area	Variation underspend - overspend + £000 (3)	Same Budget underspend - overspend + £000 (4)	Different Budget underspend - overspend + £000 (5)	Virement of Carry Forward		Total proposed Carry Forward Surplus - Deficit + £000 (9)	Remainder of Variation Returned to Balances £000 (10)	Justification for Carry Forward
					Within Directorate £000 (6)	Other Directorate £000 (7)			
(1)	(2)								
CYFP1	Young People & Access to Education								
CYFP1.1	SEN Disability & Access Education	-22	0	-22	22		0		
CYFP1.12	Special Educational Needs	78	0	78	-78		0		
CYFP1.13	SEN Support Services	-219	0	-219	219		0		
CYFP1.14	Service for Disabled Children								
CYFP1.2	Social Inclusion & Integrated Support Services								
CYFP1.21	Psychological Services	-16	0	-16	16		0		
CYFP1.22	Attendance and Welfare	-71	0	-71	71		0		
CYFP1.23	Alternative Education	65	0	65	-65		0		
CYFP1.24	Children's Rights & Participation	0	0	0	0		0		
CYFP1.25	Student Support	13	0	13	-13		0		
CYFP1.27	Centrally Managed Services	-2	0	-2	2		0		
CYFP1.3	Youth Support Services	-181	-188	7	-7		-188		Underspend on ABG funding of Connexions that is expected to breakeven over the 3 years of funding. Required to meet contractor liability in 2010/11.
CYFP1.4	Performance & Operations								
CYFP1.41	Operations	-10	0	-10	10		0		
CYFP1.5	Youth Offending Service								
CYFP1.51	Youth Offending Service	-33	-39	6	-6		-39		Funding to be passed over to the PCT and OBMH for joint programme of work linked to the Family Intervention grant. There have been recruitment delays that have led to the underspend in 2009/10.
	Sub-total Young People & Access to Education	-398	-227	-171	171	0	-227	0	
CYFP2	Children & Families								
CYFP2.1	Children Looked After								
CYFP2.11	Educational Achievement	-47	0	-47	47		0		
CYFP2.12	Residential	-41	0	-41	41		0		
CYFP2.13	Family Placement	451	0	451	-451		0		
CYFP2.14	Children Looked After	1,166	629	537	-537		629		Overspend on asylum where the grant received has been less than the level of spend.
CYFP2.15	Agency Residential Placements	1,278	0	1,278	-1,278		0		
CYFP2.16	Transport Costs	152	0	152	-152		0		
CYFP2.2	Early Learning and Childcare								
CYFP2.21	Early Years and Childcare Countywide	185	0	185	-185		0		
CYFP2.22	Early Years and Childcare Area Teams	-13	0	-13	13		0		
CYFP2.23	Childrens Centres and Childcare Development Countywide	-55	0	-55	55		0		
CYFP2.24	Childrens Centres and Childcare Development Area Teams	-9	0	-9	9		0		
CYFP2.3	Family Support and Assessment								
CYFP2.31	Central Support Costs	-8	0	-8	8		0		
CYFP2.32	Family Support	202	0	202	-202		0		
CYFP2.33	Assessment	10	0	10	-10		0		
CYFP2.34	Child and Adolescent Mental Health	-238	0	-238	238		0		
CYFP2.4	Safeguarding and Quality Assurance								
CYFP2.41	Safeguarding	-3	0	-3	3		0		
CYFP2.5	Central Costs								
CYFP2.51	Locality Working	262	0	262	-262		0		
CYFP2.52	Locality Working	-40	0	-40	40		0		
	Sub-total Children & Families	3,252	629	2,623	-2,623	0	629	0	

DIRECTORATE: Social & Community Services
PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010
ANALYSIS OF CARRY FORWARD AND PROPOSALS FOR USE OF CARRY FORWARD

Budget Book Ref	Service Area	Variation underspend - overspend + £000 (3)	Same Budget underspend - overspend + £000 (4)	Different Budget underspend - overspend + £000 (5)	Virement of Carry Forward			Total proposed Carry Forward Surplus - Deficit + £000 (9)	Remainder of Variation Returned to Balances £000 (10)	Justification for Carry Forward
					Within Directorate £000 (6)	Other Directorate £000 (7)	C/fwd Virement Annex 2(b) (8)			
(1)	(2)									
SC1	Community Services									
SC1_1	Library Services	-18	-18		0	0	-18			Children's Centre Mobile. The service is being run under an SLA with CFPF. Delivery of the vehicle was delayed from October 2009 until January 2010 due to problems with the builders. This delayed the start of the service and resulted in some anticipated costs not arising within the 2009/10 financial year
SC1_2	Heritage and Arts Service	-10	-12	2	-2	0	-12			Cogges Farm Museum under-spend due to delays in handover to the new Trust.
SC1_3	Cultural & Community Development	-5	0	-5	5	0	0			A four year action plan is on place to manage the overspending on the Adult Learning Service budget. The plan is being monitored monthly and will be adjusted as necessary to ensure the delivery of a balanced budget and repayment of supplementary estimates by March 2013.
SC1_4	Adult Learning	233	233		0	0	233			
SC1_5	Music Services	122	122		0	0	122			The Music Service overspent by £122k. A 4 year Music Service Change Programme has been drawn up to bring the service into a break-even position. The over spend for 2009/2010 will be carried forward into 2010/2011 as part of the recovery programme.
SC1_6	Registration	-11	0	-11	11	0	0			
	Sub-total Community Services	311	325	-14	14	0	325	0		
SC2	Social care for Adults									
SC2_1A	Sensory Impairment	-72		-72	72	0	0			
SC2_1B	Occupational Therapy & Equipment	224		224	-224	0	0			
SC2_1C	Service Agreements	-90		-90	90	0	0			
SC2_1D	Employment Service	-31		-31	31	0	0			
SC2_1E	Adult Placement Service	-56		-56	56	0	0			
SC2_1F	Asylum Seekers	-45		-45	45	0	0			
SC2_1G	Direct Payments Service	-62		-62	62	0	0			
SC2_1H	Adult Protection & Mental capacity	-85		-60	60	0	-25			Committed costs for a 6 month secondment for a Senior Pritioner from the MH Stop Team to assist the lead on Mental Capacity Act work. The secondment was originally due to start in 2009/10 but has slipped and will now start in May 2010. The underspend generated in 2009/10 because of the delay in the secondment is required to fund the post in 2010/11.

DIRECTORATE: Social & Community Services
PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010
ANALYSIS OF CARRY FORWARD AND PROPOSALS FOR USE OF CARRY FORWARD

Budget Book Ref	Service Area	Variation underspend - overspend + £000 (3)	Same Budget underspend - overspend + £000 (4)	Different Budget underspend - overspend + £000 (5)	Virement of Carry Forward			Total proposed Carry Forward Surplus - Deficit + £000 (9)	Remainder of Variation Returned to Balances £000 (10)	Justification for Carry Forward
					Within Directorate £000 (6)	Other Directorate £000 (7)	C/fwd Virement Ref Annex 2(b) (8)			
SC2_11	One Off Funding Projects	-237	-250	13	-13	0	SCS5 & SCS6	-250	£000 (10)	Alert/Telecare: The procurement activity joining the Telecare service with Supporting People has now happened and a new service, Alert, is to be phased in across the county with effect from 1 April 2010. There is to be a transition phase from 1 April 2010 which will allow the migration of existing Telecare clients into the new Alert service as a consequence of which operational staff and resources will be required to effect this transition. It is therefore necessary to request this budget underspend to be carried forward to meet the existing contractual requirements of the Telecare contracts until all service users are absorbed into the Alert contract. This migration affects 1800 existing Telecare clients and it is of paramount importance that their transfer to the new service is undertaken in a way which is sensitive to their needs; hence the requirement for the continuation of the Telecare service until this transition has been achieved.
SC2_1J	Emergency Duty Team	14		14	-14	0		0		
	Sub-total For All Client Groups	-440	-275	-165	165	0		-275	0	
SC2_2A	Contribution to OP Pool	97	686	-589	589	0		686		The overspend of £790k on the Older People's and Physical Disabilities Pooled Budget has been offset by various underspends elsewhere in the directorate. The net overspend of £686k will be carried forward in the pooled budget in 2010/11.
SC2_2B	Care Management Teams	538	0	538	-538	0		0		
SC2_2C	External Home Support	24	0	24	-24	0		0		
SC2_2E	Fairer Charging	-145	0	-145	145	0		0		
SC2_2F	Internal Day Services	0	0	0	0	0		0		
SC2_2H	Section 117 Reassessments	-31	0	-31	31	0		0		
SC2_2I	Contribution to Pooled Budget	-25	0	-25	25	0		0		
SC2_2J	Care Management Teams	123	0	123	-123	0		0		
SC2_2K	Acquired Brain Injury	-99	0	-99	99	0		0		
SC2_2L	Service Agreements	0	0	0	0	0		0		
	Sub-total Older People & Physical Disabilities	482	686	-204	204	0		686	0	
SC2_3A	OCC Contrib to PD Pool	8	0	8	-8	0		0		
SC2_3B	Drugs and Alcohol	-4	0	-4	4	0		0		
	Sub-total Integrated Mental Health Services	4	0	4	-4	0		0	0	

**DIRECTORATE: Social & Community Services
PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010
ANALYSIS OF CARRY FORWARD AND PROPOSALS FOR USE OF CARRY FORWARD**

Budget Book Ref	Service Area	Variation underspend - overspend + £000 (3)	Same Budget underspend - overspend + £000 (4)	Different Budget underspend - overspend + £000 (5)	Virement of Carry Forward			Total proposed Carry Forward Surplus - Deficit + £000 (9)	Remainder of Variation Returned to Balances £000 (10)	Justification for Carry Forward
					Within Directorate £000 (6)	Other Directorate £000 (7)	C/fwd Virement Annex 2(b) (8)			
(1)	(2)									
SC2_4A	Commissioning & Contracts	-39	0	-39	39	0	0	0		
SC2_4B	Care Management & Social Work	23	0	23	-23	0	0	0		
SC2_4C	Residential Internal	2	0	2	-2	0	0	0		
SC2_4D	Supported Living Internal	87	0	87	-87	0	0	0		
SC2_4E	Day Services Internal	11	0	11	-11	0	0	0		
SC2_4F	OCC Contribution to the Learning Disabilities Pool	288	0	288	-288	0	0	0		(11)
	Sub-total Learning Disabilities	372	0	372	-372	0	0	0	0	
	Sub-total Social care for Adults	418	411	7	-7	0	411	0	0	
SC3	Major Projects (excluding Supporting People)									
SC3_2	Major Projects	0	0	0	0	0	0	0		
SC3_3	Closed Homes	1	0	1	-1	0	0	0		
	Sub-Total Major Projects (Excluding Supporting People)	1	0	1	-1	0	0	0	0	
SC3.4	Supporting People									
SC3_4	Supporting People	0	0	0	0	0	0	0		
	Sub-total Supporting People	0	0	0	0	0	0	0	0	
SC4	Strategy and Transformation									
SC4_1A	Recharges	83	0	83	-83	0	0	0		
SC4_1B	Information Systems & Processes	-132	0	-132	132	0	0	0		
SC4_1C	Facilities Management	-32	0	-32	32	0	0	0		
SC4_2A	Strategy	-134	0	-134	134	0	0	0		
SC4_2B	Projects	-82	0	-82	82	0	0	0		
SC4_2C	Contracts	3	0	3	-3	0	0	0		
SC4_3	Directorate Leadership Team	300	0	300	-300	0	0	0		
SC4_4	Transforming Social Care	0	0	0	0	0	0	0		
	Sub-total Strategy and Transformation	6	0	6	-6	0	0	0	0	
	Directorate Total	736	736	0	0	0	736	0	0	
	TOTAL UNDERSPENDS			-1,744						
	TOTAL OVERSPENDS			1,744						

DIRECTORATE: Environment & Economy

PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010

ANALYSIS OF CARRY FORWARD AND PROPOSALS FOR USE OF CARRY FORWARD

Budget Book Ref	Service Area	Variation underspend - overspend + £000 (3)	Same Budget underspend - overspend + £000 (4)	Different Budget underspend - overspend + £000 (5)	Virement of Carry Forward			Total proposed Carry Forward Surplus - Deficit + £000 (9)	Remainder of Variation Returned to Balances £000 (10)	Justification for Carry Forward
					Within Directorate £000 (6)	Other Directorate £000 (7)	C/fwd Virement Ref Annex 2(b) (8)			
EE1	Transport									
EE1.1	Service Management	13	13		-13		0			
EE1.2	Policy & Strategy	-185	-95	-90	90		-95			£83k Concessionary Fares set up fund
EE1.3	Network Management	121	121		-121		0			
EE1.4	Oxfordshire Highways	-47		-47	47		0			
	Sub-total Transport	-98	39	-137	3	0	-95	0		
EE2	Sustainable Development									
EE2.1	Service Management	2	2		-2		0			
EE2.1.1	Flood Defence	0					0			
EE2.2	Planning Implementation	-125	-125		-28		-153			Frideswide Square implementation costs
EE2.3	Economy, Spatial Planning & Climate Change	-73		-73	73		0			
EE2.4	Waste Management	-324	-100	-224	224		-100			Waste Treatment project costs
EE2.5	Countryside	-46		-46	46		0			
EE2.6	BREW	0					0			
	Sub-total Sustainable Development	-566	-223	-343	313	0	-253	0		

DIRECTORATE: Environment & Economy

PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010

ANALYSIS OF CARRY FORWARD AND PROPOSALS FOR USE OF CARRY FORWARD

Budget Book Ref	Service Area	Variation underspend - overspend + £000 (3)	Same Budget underspend - overspend + £000 (4)	Different Budget underspend - overspend + £000 (5)	Virement of Carry Forward			Total proposed Carry Forward Surplus - Deficit + £000 (9)	Remainder of Variation Returned to Balances £000 (10)	Justification for Carry Forward
					Within Directorate £000 (6)	Other Directorate £000 (7)	C/fwd Virement Ref Annex 2(b) (8)			
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)
EE3	Property Services									
EE3.1.1	Corporate Properties	58		58	-58		l	0		
EE3.1.2	Operational Asset Management	-56		-56	56		m	0		
EE3.1.3	Strategic Asset Management	178		178	-178		n	0		
EE3.1.4	Project Delivery	0					o	0		
EE3.1.5	Sustainability & Procurement	-86		-28	28		p	-58		SALIX match funding
EE3.1.6	Information & Support	25		25	-25		q	0		
	Sub-total Property Services	119	-58	177	-177	0		-58		
EE4	Business Support									
EE4.1	Business Improvement	139		139	-139		r	0		
	Sub-total Business Support	139	0	139	-139	0		0		
	Directorate Total	-406	-242	-164	0	0		-406		
	TOTAL UNDERSPENDS			-564						
	TOTAL OVERSPENDS			400						

**PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010
ANALYSIS OF CARRY FORWARD AND PROPOSALS FOR USE OF CARRY FORWARD**

Budget Book Ref	Service Area	Variation underspend - overspend + £000 (3)	Same Budget underspend - overspend + £000 (4)	Different Budget underspend - overspend + £000 (5)	Virement of Carry Forward		Total proposed Carry Forward Surplus - Deficit + £000 (9)	Remainder of Variation Returned to Balances £000 (10)	Justification for Carry Forward	
					Within Directorate £000 (6)	Other Directorate £000 (7)				
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)
CS1	Fire & Rescue Service									
CS1.1	Wholetime Operational Staff	13		13	-13		CS(a)	0		
CS1.2	Service Delivery Management	39		39	-39		CS(a)	0		
CS1.3	Special Projects	-19		-19	19		CS(a)	0		
CS1.4	Business Management	-127		-127	127		CS(a)	0		
CS1.5	Service Support Management	9	9		-126		CS(a), CS (b)	-117		£117k carry forward to implement an action plan following a Health & Safety Executive
	Sub-total Service Area	-85	9	-94	-32	0		-117	0	
CS2	Emergency Planning Service	-35	-35					-35		Various one off pressures in the service.
	Sub-total Service Area	-35	-35	0	0	0		-35	0	
CS3	Safer & Stronger Communities Unit	4		4	-11		CS(b)	-7		Funding for MANTRA (Challenging Hate Crime)
	Sub-total Service Area	4	0	4	-11	0		-7	0	
CS4	Gypsy & Traveller Services	-74	0	-74	74		CS(b)	0		
	Sub-total Service Area	-74	0	-74	74	0		0	0	

**PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010
ANALYSIS OF CARRY FORWARD AND PROPOSALS FOR USE OF CARRY FORWARD**

Budget Book Ref	Service Area	Variation underspend - overspend + £000 (3)	Same Budget underspend - overspend + £000 (4)	Different Budget underspend - overspend + £000 (5)	Virement of Carry Forward			Total proposed Carry Forward	Remainder of Variation Returned to Balances	Justification for Carry Forward
					Within Directorate £000 (6)	Other Directorate £000 (7)	C/fwd Virement Ref Annex 2(b) (8)			
(1)	(2)				£000 (6)	£000 (7)	(8)	£000 (9)	£000 (10)	(11)
CS5	Trading Standards	12		12	-31		CS(b)	-19		-£28k carry forward for a Data Exchange Interface. £9k LAA manager overspend (to be reclaimed from PRG grant in 10/11).
	Sub-total Service Area	12	0	12	-31	0		-19	0	
	Shared Services									
CS6.1.1	Management Team	-37	-37					-37		Maternity cover
CS6.1.2	Financial Services	-30	-30					-30		Maternity cover
CS6.1.3	Financial Management & Accounting	-124	-124					-124		To complete the 2 year Implementing Financial Reporting Standards Project (£124k)
	Financial Management & Accounting	-96	-96					-96		Restructure of school finance team (£60K), finance training (£13K), other one off pressures (£23K)
CS6.1.4	Human Resources	-247	-247					-247		L&D Plan (£247k) to be used for (1) ICT workforce training, (2) supporting the continuation of NVQs for both OCC and the independent sector social care workforce into 2011, (3) the continuing support to directorate CPD budgets
	Human Resources	-54	-54					-54		Income for undergraduate social worker practice placements
	Human Resources	-39	-39					-39		Sickness management (-30k), Worklife Enhancement (-9k)
	Sub-total Service Area	-627	-627	0	0	0		-627	0	
	Directorate Total	-805	-653	-152	0	0		-805	0	
	TOTAL UNDERSPENDS			-220						
	TOTAL OVERSPENDS			68						

DIRECTORATE: Corporate Core

PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010
ANALYSIS OF CARRY FORWARD AND PROPOSALS FOR USE OF CARRY FORWARD

Budget Book Ref	Service Area	Variation underspend - overspend + £000 (3)	Same Budget underspend - overspend + £000 (4)	Different Budget underspend - overspend + £000 (5)	Virement of Carry Forward			Total proposed Carry Forward Surplus - Deficit + £000 (9)	Remainder of Variation Returned to Balances £000 (10)	Justification for Carry Forward
					Within Directorate £000 (6)	Other Directorate £000 (7)	C/fwd Virement Annex 2(b) (8)			
(1)	(2)									
CC1	Business Support	-31	-31		-143		CC(i)	-174	(10)	£174k - Initiatives Fund - It is proposed that the underspend balance for Corporate Core, where services have not submitted a carry forward request, is transferred to the Corporate Initiatives Fund. It would be used to finance various one off corporate pressures and projects including document manager, accommodation work at County Hall and the Staff
	Sub-total Business Support	-31	-31	0	-143	0		-174		
CC2	ICT	29	29		-29			0		
	Sub-total ICT	29	29	0	-29	0		0		
CC3	Strategic Human Resources & Organisational Development	-217	-170	-47	47		CC(i)	-170		£65k - Apprenticeships - Apprenticeships begin in September and their employment and training follows an academic year as opposed to the financial year. The carry forward is required to continue to fund apprentices who commenced work in September 2009. £105k - Organisational Development - The carry forward from the OD budget will be used to fund a 2-year Talent Management Consultant role. We need to increase our strategic capacity so that we can build on the momentum of the Lead Oxfordshire programme. The role will focus on effective and innovative practices in talent management; employee engagement; and performance management. It will facilitate the integration of these practices into the wide organisation so that they become business as usual and the 'way we do things' (culture).
	Sub-total Strategic Human Resources & Organisational Development	-217	-170	-47	47	0		-170		
CC4	Finance & Procurement	-122	-35	-87	87		CC(i)	-35		Completion of Source Oxon portal (Procurement). This budget was carried forward from 2008/09 but the project has been late starting.
	Sub-total Finance & Procurement	-122	-35	-87	87	0		-35		
CC5	Legal & Democratic Services Democratic Services Chairman	-10	-10		-25		CC(ii)	-23 -12		Completion of projects Armed Forces Day on 26 June 2010
	Sub-total Legal & Democratic Services	-10	-10	0	-25	0		-35		

DIRECTORATE: Corporate Core

Annex 2a

PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010
ANALYSIS OF CARRY FORWARD AND PROPOSALS FOR USE OF CARRY FORWARD

Budget Book Ref	Service Area	Variation underspend - overspend + £000 (3)	Same Budget underspend - overspend + £000 (4)	Different Budget underspend - overspend + £000 (5)	Virement of Carry Forward			Total proposed Carry Forward Surplus - Deficit + £000 (9)	Remainder of Variation Returned to Balances £000 (10)	Justification for Carry Forward
					Within Directorate £000 (6)	Other Directorate £000 (7)	C/fwd Virement Ref Annex 2(b) (8)			
(1)	(2)									
CC6	Partnerships	-70	-60	-10	10		CC(i)	-60		(1) One off cost of unit restructure to meet efficiency targets (£35K). (2) Closer to Communities / Place work originally planned for 09-10. The Cabinet decision on Closer to Communities was taken in January 2010 requiring us to move the implementation timetable forward (£35K).
	Sub-total	-70	-60	-10	10	0		-60		
CC7	Policy Unit	-122	-51	-71	71		CC(ii) CC(iii)	-51		(1) Completion of the Oxfordshire Data Observatory Local Information System. This is an ICT project approved by CCMT which will deliver far better access to key datasets across the Oxfordshire Partnership (£41K).
	Sub-total Policy Unit	-122	-51	-71	71	0		-51		
CC8	Communication & Public Affairs	-28	-28		-18		CC(iii)	-46		Localities leaflets
	Sub-total Communication & Public Affairs	-28	-28	0	-18	0		-46		
CC9	Change Fund									
	Sub-total Change Fund	0	0	0	0	0		0		
CC10	Corporate & Democratic Core									
	Sub-total Corporate & Democratic Core	0	0	0	0	0		0		
	Directorate Total	-571	-356	-215	0	0		-571		
TOTAL UNDERSPENDS									-215	
TOTAL OVERSPENDS									0	

DIRECTORATE: Children, Young People & Families

Annex 2b

PROVISIONAL REVENUE OUTTURN 2009/10
 CABINET 22 June 2010
 PROPOSED VIREMENT OF UNDERSPEND CARRY FORWARDS IN 2010/11

C/fwd Virement Ref.	Budget Book Ref.	Service Area	Details	From underspend - £000 (5)	Within Directorate underspend - £000 (6)	To Other Directorate underspend - £000 (7)
(1)	(2)	(3)	(4)	(5)	(6)	(7)
	CYPF1	Young People & Access to Education				
	CYPF1.1	SEN, Disability & Access Education				
CY1.12	CYPF1.12	Special Educational Needs	Use of underspend to offset overspends within the directorate	-22		
CY1.13	CYPF1.13	SEN Support Services	Overspend offset by underspends from within the directorate		-78	
CY1.14	CYPF1.14	Service for Disabled Children	Use of underspend to offset overspends within the directorate	-219		
	CYPF1.2	Social Inclusion & Integrated Support Services				
CY1.21	CYPF1.21	Psychological Services	Use of underspend to offset overspends within the directorate	-16		
CY1.22	CYPF1.22	Attendance and Welfare	Use of underspend to offset overspends within the directorate	-71		
CY1.23	CYPF1.23	Alternative Education	Overspend offset by underspends from within the directorate		-65	
CY1.25	CYPF1.25	Student Support	Overspend offset by underspends from within the directorate		-13	
CY1.27	CYPF1.27	Centrally Managed Services	Use of underspend to offset overspends within the directorate	-2		
CY1.3	CYPF1.3	Youth Support Services			-7	
	CYPF1.4	Performance & Operations				
CY1.41	CYPF1.41	Operations	Use of underspend to offset overspends within the directorate	-10		
	CYPF1.5	Youth Offending Service				
CY1.51	CYPF1.51	Youth Offending Service	Overspend offset by underspends from within the directorate		-6	
	CYPF2	Children & Families				
	CYPF2.1	Children Looked After				
CY2.11	CYPF2.11	Educational Achievement	Use of underspend to offset overspends within the directorate	-47		
CY2.12	CYPF2.12	Residential	Use of underspend to offset overspends within the directorate	-41		
CY2.13	CYPF2.13	Family Placement	Overspend offset by underspends from within the directorate		-451	
CY2.14	CYPF2.14	Children Looked After	Overspend offset by underspends from within the directorate		-537	
CY2.15	CYPF2.15	Agency Residential Placements	Overspend offset by underspends from within the directorate		-1,278	
CY2.16	CYPF2.16	Transport Costs	Overspend offset by underspends from within the directorate		-152	
	CYPF2.2	Early Learning and Childcare				
CY2.21	CYPF2.21	Early Years and Childcare Countywide	Overspend offset by underspends from within the directorate		-185	
CY2.22	CYPF2.22	Early Years and Childcare Area Teams	Use of underspend to offset overspends within the directorate	-13		
CY2.23	CYPF2.23	Childrens Centres and Childcare Development Countywide	Use of underspend to offset overspends within the directorate	-55		
CY2.24	CYPF2.24	Childrens Centres and Childcare Development Area Teams	Use of underspend to offset overspends within the directorate	-9		

C/fwd Virement Ref.	Budget Book Ref.	Service Area	Details	From		To	
				underspend - £000 (5)	Within Directorate underspend - £000 (6)	Other Directorate underspend - £000 (7)	
(1)	(2)	(3)	(4)	(5)	(6)	(7)	
	CYF2.3	Family Support and Assessment					
CY2.31	CYF2.31	Central Support Costs	Use of underspend to offset overspends within the directorate	-8	-202		
CY2.32	CYF2.32	Family Support	Overspend offset by underspends from within the directorate		-10		
CY2.33	CYF2.33	Assessment	Overspend offset by underspends from within the directorate	-238			
CY2.34	CYF2.34	Child and Adolescent Mental Health	Use of underspend to offset overspends within the directorate	-3			
CY2.4	CYF2.4	Safeguarding and Quality Assurance	Use of underspend to offset overspends within the directorate		-262		
CY2.5	CYF2.5	Central Costs	Overspend offset by underspends from within the directorate				
CY1.26	CYF1.26	Locality Working	Use of underspend to offset overspends within the directorate	-40			
	CYF3	Raising Achievement					
	CYF3.1	School Services					
CY3.12	CYF3.12	Governor Services	Use of underspend to offset overspends within the directorate	-14			
CY3.13	CYF3.13	Branch Administration	Use of underspend to offset overspends within the directorate	-158			
CY3.16	CYF3.16	Community Learning	Overspend offset by underspends from within the directorate		-37		
	CYF3.2	Learning and Achievement					
CY3.21	CYF3.21	Professional development	Overspend offset by underspends from within the directorate		-785		
CY3.22	CYF3.22	Educational Achievement and Service Monitoring	Use of underspend to offset overspends within the directorate	-337			
CY3.23	CYF3.23	Curriculum Learning and Inclusion	Use of underspend to offset overspends within the directorate	-206			
CY3.24	CYF3.24	Partnership Development and Extended Learning	Overspend offset by underspends from within the directorate		-125		
CY3.2	CYF3.25	Secondary School Improvement	Overspend offset by underspends from within the directorate		-28		
	CYF3.3	Central Costs					
CY3.31	CYF3.31	Strategic Management	Use of underspend to offset overspends within the directorate	-848			
	CYF4	Commissioning Strategy & Local Development					
CY4.1	CYF4.1	Planning and Performance	Overspend offset by underspends from within the directorate		-99		
CY4.2	CYF4.2	Commissioning and Partnerships	Use of underspend to offset overspends within the directorate	-42			
CY4.3	CYF4.3	Information Management and Business Support	Overspend offset by underspends from within the directorate		-388		
CY4.4	CYF4.4	Human resources and workforce development	Use of underspend to offset overspends within the directorate	-22			
CY4.5	CYF4.5	Property and Assets	Use of underspend to offset overspends within the directorate	-1,478			
CY4.6	CYF4.6	Finance and Accounting	Overspend offset by underspends from within the directorate		-2		
CY4.7	CYF4.7	Central Costs	Overspend offset by underspends from within the directorate	-5			
CY4.8	CYF4.8	DSG Income	Use of underspend to offset overspends within the directorate	-95			
CY4.10	CYF4.10	Participation and Play	Use of underspend to offset overspends within the directorate		-1,390		
	CYF5	Schools					
CY5.2	CYF5.2	Devolved Budgets	Use of underspend to offset overspends within the directorate	-2,101			
		Total Virements		-6,100	-6,100	0	

DIRECTORATE: Social & Community Services

Annex 2b

PROVISIONAL REVENUE OUTTURN 2009/10
 CABINET 22 June 2010
 PROPOSED VIREMENT OF UNDERSPEND CARRY FORWARDS IN 2010/11

C/fwd Virement Ref.	Budget Book Ref.	Service Area	Details	From underspend - £000 (5)	To	Within Directorate underspend - £000 (6)	Other Directorate underspend - £000 (7)
(1)	(2)	(3)	(4)	(5)			
SCS2	SC1	Community Services					
	SC1_2	Heritage and Arts Service					
	SC1_3	Cultural & Community Development		-5		-2	
	SC1_6	Registration		-11			
	SC2	Social care for Adults					
	SC2_1A	Sensory Impairment					
	SC2_1B	Occupational Therapy & Equipment		-72		-224	
	SC2_1C	Service Agreements		-90			
	SC2_1D	Employment Service		-31			
	SC2_1E	Adult Placement Service		-56			
	SC2_1F	Asylum Seekers		-45			
	SC2_1G	Direct Payments Service		-62			
	SC2_1H	Adult Protection & Mental capacity		-60			
	SC2_1I	One Off Funding Projects				-13	
	SC2_1J	Emergency Duty Team				-14	
	SC2_2A	Contribution to OP Pool		-589			
	SC2_2B	Care Management Teams				-538	
	SC2_2C	External Home Support				-24	
	SC2_2E	Fairer Charging		-145			
	SC2_2H	Section 117 Reassessments		-31			
	SC2_2I	Contribution to Pooled Budget		-25			
	SC2_2J	Care Management Teams		-99		-123	
	SC2_2K	Acquired Brain Injury					
	SC2_3A	OCC Contrib to PD Pool					
	SC2_3B	Drugs and Alcohol		-4		-8	
	SC2_4A	Commissioning & Contracts		-39			
	SC2_4B	Care Management & Social Work				-23	
	SC2_4C	Residential Internal				-2	
	SC2_4D	Supported Living Internal				-87	

DIRECTORATE: Environment & Economy
PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010
PROPOSED VIREMENT OF UNDERSPEND CARRY FORWARDS IN 2010/11

C/fwd Virement Ref.	Budget Book Ref.	Service Area	Details	From underspend - £000 (5)	To	
					Within Directorate underspend - £000 (6)	Other Directorate underspend - £000 (7)
(1)	(2)	(3)	(4)	(5)	(6)	(7)
a	EE1.1	Transport Service Management			-13	
b	EE1.2	Policy & Strategy		-90		
c	EE1.3	Network Management			-121	
d	EE1.4	Oxfordshire Highways		-47		
e	EE2.1	Sustainable Development Service Management			-2	
f	EE2.1.1	Flood Defence				
g	EE2.2	Planning Implementation			-28	
h	EE2.3	Economy, Spatial Planning & Climate Change		-73		
i	EE2.4	Waste Management		-224		
j	EE2.5	Countryside			-46	
k	EE2.6	BREW				
l	EE3.1.1	Property Services Corporate Properties			-58	
m	EE3.1.2	Operational Asset Management		-56		
n	EE3.1.3	Strategic Asset Management			-178	
o	EE3.1.4	Project Delivery				
p	EE3.1.5	Sustainability & Procurement		-28		
q	EE3.1.6	Information & Support			-25	
r	EE4.1	Business Support Business Improvement			-139	
Total Virements				-564	-564	0

DIRECTORATE: Community Safety & Shared Services

Annex 2b

**PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010
PROPOSED VIREMENT OF UNDERSPEND CARRY FORWARDS IN 2010/11**

C/fwd Virement Ref.	Budget Book Ref.	Service Area	Details	From underspend - £000 (5)	To Within Directorate underspend - £000 (6)	Other Directorate underspend - £000 (7)
(1)	(2)	(3)	(4)	(5)	(6)	(7)
CS(a)	CS1.1 CS1.2 CS1.3 CS1.4 CS1.5	Wholetime Operational Staff Service Delivery Management Special Projects Business Management Service Support Management	Cover overspends in F&RS	-13 -39 -19 -127	-13 -39 -94	
CS(b)	CS4 CS3 CS5 CS1.5	Gypsy & Traveller Services Safer & Stronger Communities Trading Standards Service Support Management	Cover overspends in Safer Communities and Trading Standards + Fire & Rescue Service	-74	-11 -31 -32	
Total Virements				-220	-220	0

DIRECTORATE: Corporate Core

Annex 2b

PROVISIONAL REVENUE OUTTURN 2009/10
 CABINET 22 June 2010
 PROPOSED VIREMENT OF UNDERSPEND CARRY FORWARDS IN 2010/11

C/fwd Virement Ref.	Budget Book Ref.	Service Area	Details	From underspend - £000 (5)	To Within Directorate underspend - £000 (6)	Other Directorate underspend - £000 (7)
(1)	(2)	(3)	(4)	(5)	(6)	(7)
CC(i)	CC1 CC3 CC4 CC6	Business Support Strategic HR & OD Finance & Procurement Partnerships	Transfer of underspend not required by the service as a Carry forward to the Initiatives Fund	-47 -87 -9	-143	
CC(ii)	CC5 CC7	Legal & Democratic Services Policy	Contribution from Policy underspend to Legal & Democratic carry forward	-25	-25	
CC(iii)	CC8 CC7	Communications & Public Affairs Policy	Contribution from Policy underspend to Communications and Public Affairs carry forward	-18	-18	
CC(iv)	CC2 CC7 CC6	ICT Policy Partnerships	Contributions from Policy & Partnerships to offset ICT overspend	-29	-28 -1	
			Total Virements	-215	-215	0

PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010
GOVERNMENT GRANTS MONITORING

Annex 3a

Ringfenced	Notification	Directorate	Status	Unused Grant Income carried forward from 2008/09 £000	Final Grant Allocation 2009/10 £000	Adjustment to final grant allocation £000	Final Grant Expenditure 2009/10 £000	Balance remaining at year end £000	Receipt in Advance £000	Unspent balance returned to grant body £000
		Children, Young People & Families								
R	F	Dedicated Schools Grant (DSG):			14,524		14,098	-426	426	
R	F	Young People & Access to Education			17,310		17,310			
R	F	Children & Families			1,620		1,620			
R	F	Raising Achievement Service			4,934		4,934			
R	F	Commissioning, Performance & Quality Assurance			283,289	56	283,542	-991	991	
R	F	Schools (incl contingency)		1,188	26,280	937	25,109	-5,569	5,569	
R	P	Standards Fund		3,461	17,704		17,704			
R	F	School Standards		27	12,640	1,949	14,590	-26	26	
R	F	Sure Start General			776	-776				
R	F	Pathfinder			28,878	854	29,720	-157	157	
OS	P	Learning & Skills Council - Schools		145		360	585	-30	30	
R	P	Learning & Skills Council - Education Business Partnership		255		911	916	-137	137	
R	P	Learning & Skills Council - 14-19 Strategy		142		50	44	-6	6	
R	P	Learning & Skills Council - Parents to be Scheme				30	30			
R	P	Learning & Skills Council - School Access Fund					91			
R	P	Learning & Skills Council - Connexions		91	1,285	351	2,552	916		
R	C	Asylum Seekers			211	-211				
		Transformation fund			184		202			
		Workforce Modernisation & Development		18	210		166	-44		8
R	P	School Support Staff training and qualifications			341	230	571		36	
R	P	Golden hellos for newly qualified teachers			65		54	-11	11	
R	P	DCSF - National College for Leadership of Schools		17	353		367	-3	3	
		Parenting Strategy Support Grant		263	230		313	-180	180	
		Contact Point		3			3			
		Creative Partnership		37	346		366	-17	17	
		Youth Opportunity Fund			1,126		1,126			
		Youth Justice Board			132		132			
R	FC	DCSF - Family Intervention project		379	305	-384	11	-289	289	
R	FC	DCSF - MTFC-P		11			11			
		Environmental arts project					209	-11	11	
		Targeted Mental Health in Schools					105			
R	P	CLG - PSA Pump Prining Grant		105		-90	482	145		
R	F	Leaving Care, Unaccompanied Asylum Seekers			427		156	57		
R	F	Probation (Home Office)		63	99		63			
R	F	DFCA - Young Victims		57	150		150			
R	F	Huntercombe Young Offenders Institution			145		145			
R	F	Thames Valley Police								

PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010
GOVERNMENT GRANTS MONITORING

Annex 3a

Ringfenced	Notification	Directorate	Status	Unused Grant Income carried forward from 2008/09 £000	Final Grant Allocation 2009/10 £000	Adjustment to final grant allocation £000	Final Grant Expenditure 2009/10 £000	Balance remaining at year end £000	Receipt in Advance £000	Unspent balance returned to grant body £000
R	F	Oxford PCT Partnership Funding		15	15		15			
		DCSF - Play Pathfinder		162	126	126	288	-85	85	
R	F	DCSF - V Programme		143	34	34	92			
R	F	NCSL - Small schools making an impact		10			10	-118	118	
R	F	Learning through Landscapes					2	-7	7	
R	F	International Projects						-26	26	
R	F	International Development Awareness					225	-107	107	
R	F	Harnessing Technology Grant		109	223	223	68	-28	28	
R	F	Oxfordshire Safeguarding Childrens Board		22	74	74	16			
R	F	Lamb Enquiry		30	16	16	30			
R	F	Keep Project					50			
R	F	PCT Advisor					13			
R	F	BECTA Consultancy					31			
		Transition Information Sessions					152			
		Back on Track					17			
		EYP Support					11			
		Teenage Pregnancy					18			
		Subtotal Children, Young People & Families		6,644	413,894	5,173	418,504	-7,207	8,260	8
		Social & Community Services								
R	P	Standards Fund (Adult Learning)					101			
OS	P	Learning & Skills Council - Adult Education		344	3,613	61	4,018			
R	P	Standards Fund (Music Service)			736	-66	670			
OS	C	General Registrars Office			8		8			
OS	C	Workstep			248	47	295			
R	P	AIDS & HIV Training		63	184	1	151	-97	97	
R	F	National Demetia Strategy			65		49	-16	16	
R	F	Adult Stroke Services		102	111		139	-74	74	
R	C	Information Advice Guidance			12	-6	6			
R	F	LD Campus Closure			29		29			
R	F	Supporting People		1364	17,019		17,546	-837	837	
R	F	Minor Repairs and Adaptations "Handyperson" Funding			125		17	-108	108	
R	F	Development of Performance Indicators			20		4	-16	16	
R	F	Social Care Reform Grant		454	1,853	41	1,200	-1,148	1,148	
		Subtotal Social & Community Services		2,327	24,023	179	24,233	-2,296	2,296	

**PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010
GOVERNMENT GRANTS MONITORING**

Annex 3a

Ringfenced	Notification	Directorate	Status	Unused Grant Income carried forward from 2008/09 £000	Final Grant Allocation 2009/10 £000	Adjustment to final grant allocation £000	Final Grant Expenditure 2009/10 £000	Balance remaining at year end £000	Receipt in Advance £000	Unspent balance returned to grant body £000
OS	P C	Environment & Economy Natural England		23	234	53	310			
		Subtotal Environment & Economy		23	234	53	310			
OS	F	Community Safety & Shared Services New Burdens Grant		144	115		199	-60	60	
R	C	Milk Grant			25	-25				
		Subtotal Community Safety & Shared Services		144	140	-25	199	-60	60	
		Corporate Core MKOB Improvement Grant		36	232	19	241	-46	46	
		Subtotal Corporate Core		36	232	19	241	-46	46	
		Total Specific Grants		9,174	438,523	5,399	443,487	-9,609	10,662	8

Ringfenced

- R** Ringfenced
U Un-ringfenced
OS Outside Aggregate External Finance therefore R/U not applicable. Assume conditions attached therefore ringfenced

Notification

- P** Provisional Notification Received
F Final Notification Received
C Claim Required

Status

- Re** Received
E Estimate

PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010
AREA BASED GRANT

Annex 3b

Notification	Directorate	Final Allocation	Final Expenditure	Balance Remaining
		£'000	£'000	£'000
	Children, Young People & Families			
F	Child & Adolescent Mental Health Grant	739	739	0
F	Carers Grant (Children)	449	449	0
F	Children's Fund	869	869	0
F	Connexions	4,670	4,482	188
F	Positive Activities for Young People Grant	306	306	0
F	Young People Substance Mis-use	107	107	0
F	Young People Substance Mis-use	81	81	0
	Former Standards Fund:			0
F	School Development Grant -LA element	1,835	987	848
F	Extended Schools Start Up Costs	1,593	1,593	0
F	School Improvement Partners	289	289	0
F	Education Health Partnerships	162	162	0
F	Choice Advisers	37	0	37
F	School Intervention	189	189	0
F	Flexible 14-19 Partnership Funding	159	159	0
F	Extended Rights to Free Travel	329	10	319
F	Sustainable Travel	52	0	52
F	Secondary National Strategy - Behaviour & Att	183	183	0
F	Secondary National Strategy - Central Co-ordination	267	267	0
F	Primary National Strategy - Central Co-ordination	320	320	0
F	Teenage Pregnancy	160	160	0
F	Care Matters White Paper	354	354	0
F	Child Death Review Processes	56	56	0
F	Child Trust Fund	6	6	0
F	Designated Teacher Funding	44	7	37
		13,256	11,775	1,481
	Social & Community Services			
F	Carers Grant	1,795	1,795	0
F	Mental Health Advocacy grant	283	283	0
F	Mental Health Grant	1,233	1,233	0
F	Preserved Rights	2,794	2,794	0
F	Supporting People Administration	374	374	0
F	Learning Disabilities Development Fund	367	367	0
F	Local Involvement Networks	223	223	0
F	Social Care Checks	2	2	0
		7,071	7,071	0
	Environment & Economy			
F	Rural Bus Services Grant	1,634	1,634	0
F	School Travel Advisers Grant	92	92	0
F	Detrunking of Non-Core Routes	1,703	1,703	0
F	Road Safety Partnerships	1,190	1,190	0
		4,619	4,619	0
	Community Safety			
F	Safer & Stronger Communities Fund Grant	652	652	0
F	Adult Social Care workforce (transferred from S&CS to Shared Services)	1,312	1,312	0
F	Children's Social Care Workforce	138	138	0
		2,102	2,102	0
	Corporate Core			
F	Community Call for Action	11	11	0
	Total Area Based Grant	27,059	25,578	1,481

Notification

- P** Provisional Notification Received
F Final Notification Received
C Claim Required

**PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010
EARMARKED RESERVES & PROVISIONS**

Annex 4

Earmarked Reserves	Balance at 1 April 2009 £000	2009/10 Movement		Balance at 31 March 2010 £000	Commentary
		Contributions from Reserve £000	Contributions to Reserve £000		
Children Young People & Families					
Primary	9,501	-4,537	3,086	8,050	
Secondary	2,881	-3,209	4,427	4,099	
Special	1,827	-754	90	1,163	
Sub total	14,209	-8,500	7,603	13,312	Includes capital reserves
School Loans	-1,488	-1,300	1,620	-1,168	
Total schools' reserves	12,721	-9,800	9,223	12,144	
Schools Contingency	-24	0	0	-24	
Schools Partnerships	805	-615	784	974	
Schools Insurance	265	0	0	265	
Youth Management Committees	374	0	36	410	
Supply Cover	2,800	0	984	3,784	
Maternity Leave	-2,892	-591	41	-3,442	
CYPF general reserve	1,000	-1,523	523	0	
Building Schools for the Future	0	0	42	42	New reserve
Oxfordshire Rural Children Centre	0	0	8	8	New reserve
Safeguarding Board	0	0	75	75	New reserve
Youth Support Service - computer system	0	0	75	75	New reserve
Residential Centres	0	0	16	16	New reserve
Children & Families Reserve	0	-257	257	0	
Directorate Total	15,049	-12,786	12,064	14,327	

**PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010
EARMARKED RESERVES & PROVISIONS**

Earmarked Reserves	2009/10				Commentary
	Balance at 1 April 2009 £000	Movement		Balance at 31 March 2010 £000	
		Contributions from Reserve £000	Contributions to Reserve £000		
Social & Community Services					
Registration Service	115		65	180	Annual contribution to reserves
Cultural Services General	106	-79	66	93	Village Hall grants contribution to reserves and utilisation of the Village Hall grants.
ICT/Digitisation projects	707	-223	243	727	Annual contribution to reserves to the ICT Digitalisation project.
Vehicle Renewals	119	-64	52	107	£223k utilised in year.
Donations	25			25	Reserves utilised during the year.
Adult Learning (CECs accumulated Surplus)	117	-117		0	Reserves utilised during the year.
Materials Development Reserve	76			76	
Wider People Pooled Budget and Learning Disabilities Pooled Budget Reserve	650	-650	101	101	£650k used for pooled budget activity in 2009/10. Contribution relates to the underspend on the Learning Disabilities in 2009/2010.
NSJ Client Income	64			64	
Personal Budgets	0	-2	50	48	Reserve for Self Directed Support
S117 Reserve	760	-500	13	273	£500k utilised as an additional contribution to the OP & PD Pooled Budget
Directorate Total	2,739	-1,635	590	1,694	

**PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010
EARMARKED RESERVES & PROVISIONS**

Annex 4

Earmarked Reserves	2009/10			Balance at 31 March 2010 £000	Commentary
	Balance at 1 April 2009 £000	Contributions from Reserve £000	Movement Contributions to Reserve £000		
Environment & Economy					
General					
Countryside Ascot Park	16		1	17	
Carbon Reduction	0		60	60	
Highways Winter Maintenance	18			18	
Dix Pit WRC Development	13			13	
Oxfordshire Waste Partnership Joint Reserve	487	-320	250	167	
Transport			89	250	Impact of cleansing the balance sheet resulting in a credit balance for unused Receipt in Advance monies
Tourism Signs				89	
Tourism Specific					
On Street Car Parking	1,847	-1,396	1,126	1,577	
Dix Pit Engineering Works	532		167	699	Main cell construction now to take place in 2010/11
Waste Management	835		1,681	2,516	Includes the full impact of the outturn position
Landfill Allowance Trading Scheme	0			0	
Vehicle Renewals	61			61	
Better Working Initiatives	69	-43		26	
SALIX Energy schemes			123	123	
Directorate Total	3,878	-1,759	3,497	5,616	
Community Safety					
Fire & Rescue					
Securing Water Supplies	0		27	27	New reserve to provide funding for fluctuations in annual expenditure on fire hydrant repairs
Protective Clothing	39			39	
Breathing Apparatus Equipment	76		19	95	
Communications Fund	59	-40		19	
Vehicles	368		75	443	
IT	35	-35	131	131	
Rescue Equipment	33	-10	3	26	
Fire Control	367			367	
Fire Link	165	-28	2	139	

**PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010
EARMARKED RESERVES & PROVISIONS**

Annex 4

Earmarked Reserves	Balance at 1 April 2009 £000	2009/10 Movement		Balance at 31 March 2010 £000	Commentary
		Contributions from Reserve £000	Contributions to Reserve £000		
<u>Emergency Planning Vehicle Renewals</u>	20		12	32	
<u>Trading Standards Vehicles</u>	7			0	
<u>Trainee</u>	12			12	
<u>Gypsy & Traveller Services Site Refurbishment</u>	73		125	198	To be used in 2010/11 to provide the Council's contribution to grant funded capital work for the extension of amenity units at the Redbridge site.
<u>Shared Services</u>				0	
<u>Shared Services Funding Reserve</u>	2,024	-5,099	4,330	1,255	see paragraph 22 of the report
<u>Money Management Reserve</u>	20		20	40	
<u>Development Reserve</u>	0		142	142	New reserve for system development in Shared Services
<u>Food with Thought / QCS Cleaning</u>	1,204	-561	418	1,061	see paragraph 23 of the report
Directorate Total	4,502	-5,773	5,304	4,033	
Corporate Core					
<u>Change Fund</u>	1,055		204	1,259	
<u>SAP for Schools</u>	332	-160		172	
<u>CIPFA Trainees</u>			13	13	
<u>Council Elections</u>	356	-261		95	
<u>FMSIS Audit</u>	132	-93		39	
<u>Schools ICT</u>	1,811	-382		1,429	
<u>Sims Support Service</u>	81	0	41	122	
<u>SAP Competency Centre</u>	298	-298		0	
<u>IT Development Fund</u>	807	-807		0	
Directorate Total	4,872	-2,001	258	3,129	

PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010
EARMARKED RESERVES & PROVISIONS

Annex 4

Earmarked Reserves	Balance at 1 April 2009 £000	2009/10 Movement		Balance at 31 March 2010 £000	Commentary
		Contributions from Reserve £000	Contributions to Reserve £000		
Corporate					
Insurance Reserve	4,604		1,423	6,027	
Carry Forward Reserve	2,535	-2,428	1,046	1,153	
Capital Reserve	8,027		5,882	13,909	
Other Reserves	-4	-2	-6		
LABGI Reserve	944	-605	452	791	
Budget Reserve - Agreed 2007	3,849	-3,849		0	
Budget Reserve - Agreed 2009	0		5,931	5,931	
Efficiency savings reserve		-362	1,881	1,519	
Contingential Borrowing Reserve	1,350	-59	1,350	2,641	
Corporate Total	21,305	-7,305	17,965	31,965	
Total	52,345	-31,259	39,678	60,764	

PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010
EARMARKED RESERVES & PROVISIONS

Provisions	Balance at 1 April 2009 £000	2009/10 Movement		Balance at 31 March 2010 £000	Commentary
		Expenditure £000	Income £000		
Children, Young People & Families Youth Offending Service	0	20	0	20	Legal case
Social & Community Services Older People Pool Provision	1,304	-563	15	756	Reduction in Continuing Care clients provision as client numbers have now been processed through the system.
S117 Provision	126	-126	0	0	Section 117 reassessments completed in 2009/10.
Directorate Total	1,430	-689	15	756	
Community Safety & Shared Services Fire & Rescue	0	0	225	225	Provision for compensation payments to retained firefighters (see paragraph 26 of the report)
Corporate Core Provision for Redundancy Costs	0	41	0	41	These redundancies will occur in 2010/11
Corporate Insurance Provision	3,635	-3,703	4,746	4,678	
Total	5,065	-4,331	4,986	5,720	

PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010
YEAR END REVENUE BALANCES

Date	Outturn 2009/10		Budget 2009/10
	£m	£m	£m
Provisional outturn 2008/09 net of City Schools	20.187		19.000
City Schools Reorganisation brought forward from 2008/09	1.369		1.369
County Fund Balance		21.556	20.369
Planned Use of Balances		-5.131	-5.131
Less City Schools Reorganisation to be carried forward		-0.775	-0.775
Original forecast outturn position 2009/10		15.650	14.463
Additions			
May-09 Surplus grant repaid in May 2009 in respect of a company liquidation	0.078		
Sep-09 LABGI Grant 2009/10	0.439		
Oct-09 Correction to grant repayment - this is a capital grant	-0.078		
Mar-10 LAA Performance Reward Grant	2.017		
		2.456	0.000
Calls on balances deducted			
Apr-09 Transfer excess over £19.0m at 2008/09 year end to Efficiency Savings Reserve in 2009/10	-1.187		
May-09 Supplementary Estimate for DSG inflation imbalance	-0.215		
Jul-09 Supplementary Estimate for third party legal fees	-0.160		
Jan-10 Supplementary Estimate for cost of defect repair for road	-0.475		
Jan-10 LABGI Grant 2009/10 - Transfer to Reserve	-0.439		
Feb-10 Agency Residential Placements	-0.300		
Feb-10 ICT Overspend	-2.250		
Mar-10 Winter Maintenance	-0.425		
Apr-10 Legal Fees over £0.25m	-0.060		
		-5.511	-2.000
Automatic calls on/returns to balances			
Non-Domestic Rates	-0.115		
Retained fire-fighters pay	-0.211		
Fire-fighters Pension Scheme - ill health retirements	0.044		
External Audit Fee	0.202		
Coroners Service	0.018		
		-0.062	
Additional Strategic Measures	0.649		
		0.649	
Other items			
Misc Employee Expenses	-0.005		
Rates Rebates	0.126		
Consultants Fees	-0.014		
Professional Fees	-0.049		
Subscriptions	-0.009		
Bad Debt Write-offs	-0.002		
Increase in provision for doubtful debts (impairment allowance)	-0.134		
Rate Refunds	0.007		
Fees & Charges Income	0.060		
		-0.020	
Provisional Outturn		13.162	12.463
Total budget requirement		379.170	379.170
Provisional balances as a % of budget requirement		3.47%	3.29%
Consolidated Revenue Balances			
Forecast outturn 2009/10 net of City Schools		15.650	
Year end balances as at 31 March 2010		13.162	
Movement on County Fund Balance		-2.488	

	OXFORD CITY Pay & Display	OXFORD CITY Special Parking Area	OXFORD CITY Residents' Parking Zones	ABINGDON	HENLEY	WALLINGFORD FARINGDON	EXTENDING DECRIM AREAS	CAMERA ENFORCEMENT	TOTAL
	£	£	£	£	£	£	£	£	£
EXPENDITURE									
EQUIPMENT/FIXED CONTRACT COSTS	117,693.48	181,436.27	117,693.48						416,823.23
MAIN CONTRACT (PATROLS etc...)	334,066.96	485,175.44	375,775.04	68,107.34	86,058.66			224,896.15	1,574,079.59
STAFF COSTS	19,838.42	61,919.93	50,497.81					150,291.10	282,547.26
PARKING SHOP	6,518.37	13,036.75	110,812.36						130,367.48
OTHER RUNNING COSTS	5,674.48	57,371.47	153,777.14	646.28	1,616.65	285.12	51,725.32	33,985.01	305,081.47
TOTAL EXPENDITURE	483,791.72	798,939.86	808,555.83	68,753.62	87,675.31	285.12	51,725.32	409,172.26	2,708,899.03
Contract Charges									
INCOME									
PAY & DISPLAY	-1,501,499.99			-28,744.45	-5,164.30				-1,535,408.74
ENFORCEMENT	-179,392.83	-629,833.73	-411,569.08	-9,508.01	-15,226.20			-339,276.63	-1,584,806.48
RESIDENTS PERMITS			-370,911.00	-10,434.53	-26,403.80				-407,749.33
OTHER			-4,000.00						-4,000.00
TOTAL INCOME	-1,680,892.82	-629,833.73	-786,480.08	-48,686.99	-46,794.30	0.00	0.00	-339,276.63	-3,531,964.55
NET INCOME	-1,197,101.10	169,106.13	22,075.75	20,066.63	40,881.01	285.12	51,725.32	69,895.63	-823,065.52

DIRECTORATE: COMMUNITY SAFETY & SHARED SERVICES

Annex 7

PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010

Shared Services: Cash Flow Forecast (2009/10 Prices)

Latest Position (2009/10 prices)	2006/07 £000 Actual	2007/08 £000 Actual	2008/09 £000 Actual	2009/10 £000	2010/11 £000	2011/12 £000	2012/13 £000	2013/14 £000	2014/15 £000	Total £000
Budget Savings	0	1,281	3,752	4,782	4,553	4,553	4,553	4,553	4,553	32,580
Project Costs	1,157	2,453	614	606	500					5,330
Additional Operating Costs	296	1,118	1,595	1,956	2,094	2,072	2,080	2,083	2,083	15,377
Net Saving / (Cost)	-1,453	-2,290	1,543	2,220	1,959	2,481	2,473	2,470	2,470	11,873
				see Notes (2)						
Cumulative Net Saving / (Cost)	-1,453	-3,743	-2,200	20	1,979	4,460	6,933	9,403	11,873	

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Budget Savings - Business Case (2005/06 prices)	2006/07 £000	2007/08 £000	2008/09 £000	2009/10 £000	2010/11 £000	2011/12 £000	2012/13 £000	2013/14 £000	2014/15* £000	Total 2009/10 Prices
Budget Savings	724	2,592	3,808	4,001	4,001	4,001	4,001	4,001		27,129
Project Costs	4,303	1,693	54							6,050
Additional Operating Costs	806	1,483	1,572	1,569	1,569	1,569	1,569	1,569		11,706
Net Saving / (Cost)	-4,385	-584	2,182	2,432	2,432	2,432	2,432	2,432		9,373
Cumulative Net Saving / (Cost)	-4,385	-4,969	-2,787	-355	2,077	4,509	6,941	9,373		10,991

Variance	2,932	1,226	587	375	-98	-49	-8	30	11,873
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Original Business Case (revised 2009/10 prices)	10,991
Variance at comparable prices (2009/10 prices)	-1,588

* original business case only went up to 2013/14

On-going annual savings of £2.5m, compared to business case (at 2009/10 prices) of £2.658m
Savings per Business Case achieved by November 2014, target March 2014

Notes

- Budget savings in 2009/10 include additional underspends by services which are not in the business plan
- Operating costs from 2010/11 includes a provision of £0.140m for a possible business rates revaluation

PROVISIONAL REVENUE OUTTURN 2009/10
CABINET 22 June 2010
2009/10 SAVINGS TO 31 MARCH 2010

	Efficiency Savings Target £'000	Savings Achieved £'000	Variance £'000	Commentary
Children, Young People & Families				
CY1 Young People and Access to Education	-1,294	-1,113	181	Unable to make savings from DSG funded services. Will be dealt with as part of the DSG reallocation exercise.
CY2 Children and Families	-733	-562	171	Childrens Social Care have been unable to achieve their savings share of £0.171m despite significant efforts to slow down placements and reduce the use of Independent Fostering Agencies.
CY3 Raising Achievement	-263	-263	0	
CY4 Commissioning, Strategy and Locality Development	-351	-387	-36	Includes increased income generation from schools target of £0.065m unachievable in this service.
CY5 Schools	0	0	0	Home to School Transport have achieved the savings originally assigned to DSG funded services.
Unallocated linked to restructure	-314	-10	304	Savings relating to the restructuring will not be achievable until the costs incurred have been repaid.
Total Children, Young People & Families	-2,955	-2,335	620	
Social & Community Services				
SC1 Community Services	-390	-390	0	
SC2 Social Care for Adults	-10,031	-9,082	949	Savings have been delayed or proved unachievable in a number of areas. An Efficiency Savings Plan for the Learning Disabilities Service is in place to deliver the savings target. Efficiencies may be achieved in ways other than those originally proposed.
SC3 Major Projects and Supporting People	0	0	0	
SC4 Strategy & Transformation	-580	-580	0	
Cross Directorate	-49	-49	0	
Total Social & Community Services	-11,050	-10,101	949	

	Efficiency Savings Target £'000	Savings Achieved £'000	Variance £'000	Commentary
Environment & Economy				
EE1 Transport	-2,539	-2,271	268	Unrealised income target
EE2 Sustainable Development	-1,928	-2,759	-831	Increased reduction in tonnage
EE3 Property Services	-717	-397	320	Capitalisation of budgets not realised and R&M overspend
EE4 Business Improvement	-40	0	40	Not being realised
Total Environment & Economy	-5,224	-5,427	-203	
Community Safety & Shared Services				
CS1 Fire & Rescue Service	-86	-86	0	
CS2 Emergency Planning	0	0	0	
CS3 Community Safety	-1	-1	0	
CS4 Traveller Sites	0	0	0	
CS5 Trading Standards	-25	-25	0	
CS6 Shared Services	-773	-773	0	This is the balance of the business case target achieved in 2009/10
Total Community Safety	-885	-885	0	
Corporate Core				
CC1 Business Support	-64	-64	0	
CC2 ICT	-881	-243	638	Saving on the provision of SAP support has been achieved by renegotiation of the contract. Pressures on the ICT budget will prevent delivery of the remaining savings this year.
CC3 Strategic HR & Organisational Development	-15	-15	0	
CC4 Finance & Procurement	-68	-68	0	
CC5 Legal and Democratic Services	-346	-346	0	
CC6 Partnerships	-72	-72	0	
CC7 Policy Unit	-52	-52	0	
CC8 Communications & Public Affairs	-10	-10	0	
CC9 Change Fund	4	4	0	now part of the Policy Unit
CC10 Corporate & Democratic Core	0	0	0	
Total Corporate Core	-1,512	-874	638	
TOTAL	-21,626	-19,622	2,004	

MONITORING OF ACTIVITY & UNIT COST VARIATIONS AS AT 31 MARCH 2010

Ref	Service Area	Activity	Activity Level (Year End Forecast)		Unit	Unit Costs (Year End Forecast)			Comments
			1 April 2009	31 March 2010		Variation	1 April 2009	31 March 2010	
	Pooled Budgets Older People Care beds with nursing Other residential beds	No. of beds No. of beds	850 832	799 932		£	£	£	
	Physical Disabilities Residential & Nursing External Home Support	No. of beds Average hours per week	70 2,435	77 2,698		735.12 29.55	668.46 29.58	-66.66 0.03	Activity figures and unit costs have been restated for 1st April. Direct payments have been excluded from the calculation
	Internal Home Support	Average hours per week	671	750		17.68	19.78	2.10	
	<u>Equipment</u> Learning Disabilities External Residential Care	N/A				2,084,935	2,101,868	16,933	
	External Home Support External Supported Living	No. of clients Average hours per week No. of clients	314 1,113 508	296 1,338 483		985.10 22.17 1,079.51	1,162.54 24.91 1,108.35	177.44 2.74 28.84	Revised Cost /activity not currently available
	ENVIRONMENT & ECONOMY Waste Management	Total landfill tonnes Total recycled/reused/composting tonnes	197,800 130,595	155,880 140,763				-41,920 10,168	
		Recycling Credits (tonnes) Dry Recycling (tonnes) Composting (tonnes)	100,000 12,785 17,300	100,018 18,797 21,948				18 6,012 4,648	1.17 Inflation Partially due to procurement savings Includes Food Waste
		Household incl landfill tax (tonnes) Non-household incl landfill tax (tonnes) Other - incl hazardous/fly tipping (tonnes)	185,200 12,600 510	145,034 10,825 21				-40,166 -1,775 -489	Now includes Transport costs Now includes Transport costs
	COMMUNITY SAFETY & SHARED SERVICES CS6 Shared Services Food with Thought CS6.1.5	Average no. of daily meals	10,657	11,395				738	£2,165,085 meals were served by Food with Thought in 2009/10. This is an increase of 6.9% compared to the previous year.

Capital Expenditure	Original Capital Programme (Dec 2008)	Latest Capital Programme (Dec 2009)	Latest Forecast Position (Feb 2010)	Actual Expenditure 2009/10	Variation to Original Capital Programme		Variation to Latest Capital Programme		Variation to Latest Forecast Position	
	£000	£000	£000		£000	%	£000	%	£000	%
<u>Directorate Programmes</u>										
Children, Young People & Families	38,505	38,785	37,986	35,621	-2,884	-7%	-3,164	-8%	-2,365	-6%
Social & Community Services	7,946	6,065	5,393	5,040	-2,906	-37%	-1,025	-17%	-353	-7%
Environment & Economy - Transport	26,406	24,809	23,443	23,085	-3,321	-13%	-1,724	-7%	-358	-2%
Environment & Economy - Other	15,085	16,272	15,645	14,957	-128	-1%	-1,315	-8%	-688	-4%
Community Safety & Shared Services	243	989	703	675	432	178%	-314	-32%	-28	-4%
Corporate Core	1,000	2,887	2,887	2,888	1,888	100%	1	0%	1	0%
Directorate Programmes Total	89,185	89,807	86,057	82,266	-6,919	-8%	-7,541	-8%	-3,791	-4%
Schools Capital	11,259	12,106	12,106	11,730	471	4%	-376	-3%	-376	-3%
Total Capital Programme Expenditure	100,444	101,913	98,163	93,996	-6,448	-6%	-7,917	-8%	-4,167	-4%
<u>Capitalisation of Revenue Expenditure</u>										
Capitalised Highways Maintenance				1,850						
Capitalised Repairs & Maintenance				2,515						
Capitalised Vehicles				1,682						
Capitalised ICT Hardware & Software				1,098						
(£1m planned capital funding included above)										
Sub-total	0	0	0	7,145						
<u>Other Adjustments</u>										
Capital Revenue Switch Adjustments	1,390	0	0	-2,378						
Technical Accounting Adjustments	286	2,035	2,035	2,083						
Earmarked Reserve Allocations										
Total Capital Expenditure	102,120	103,948	100,198	100,846						

Capital Financing	Original Capital Programme (Dec 2008) £000	Latest Capital Programme (Dec 2009) £000	Actual Financing 2009/10 £000	Variation to Original Capital Programme £000	Variation to Latest Capital Programme £000
SCE(R) Formulaic Capital Allocations - Credit Approval	27,889	29,739	29,741	1,852	2
SCE(R) Formulaic Capital Allocations - Grant	8,222	4,222	4,558	-3,664	336
Other Grants	37,112	39,867	43,747	6,635	3,880
Developer Contributions	8,090	5,271	4,553	-3,537	-718
Other External Contributions	2,942	3,966	1,828	-1,114	-2,138
Schools Contributions	500	893	1,867	1,367	974
Revenue Funding	620	1,271	1,167	547	-104
Prudential Borrowing	8,826	9,824	8,701	-125	-1,123
Capital Receipts	7,633	6,860	0	-7,633	-6,860
Capital Programme Financing	101,834	101,913	96,162	-5,672	-5,751
Revenue funding of capitalised revenue expenditure			4,684		
Earmarked Reserve Allocations	286	2,035			
Total Capital Financing	102,120	103,948	100,846		

Capital Balances	Balance brought forward at 1 April 2009 £000	Original planned balance carried forward £000	Latest planned balance carried forward £000	Actual balance carried forward at 31 Mar 2010 £000	Variation to Original Capital Programme £000	Variation to Latest Capital Programme £000
Capital Reserve	8,027	8,027	10,888	13,909	5,882	3,021
Capital Receipts Unapplied	2,980	11,421	3,137	1,721	-9,700	-1,416
Total	11,007	19,448	14,025	15,630	-3,818	1,605

Children, Young People & Families Capital Programme Provisional Outturn 2009/10

Annex 10

Ref	Scheme	Original Capital Programme (Dec 2008) £000	Latest Capital Programme (Dec 2009) £000	Latest Forecast Position (Feb 2010) £000	Actual Expenditure 2009/10 £000	Variation to original Capital Programme £000	Variation to latest Capital Programme £000	Variation to latest Forecast Position £000	Comments
1	Primary Capital Programme Combe - Hall & Classrooms	350	241	211	192	-158	-49	-19	Complete Aug 09. Accelerated spend in 08/09.
2	Charlton-on-Otmoor - Repl of Temporary Classrooms	400	600	600	390	-10	-210	-210	On-site. 3 week slippage due to weather.
3	Thame, Barley Hill - Repl of Temporary Classrooms	300	630	630	487	187	-143	-143	On-site. Forecast completion Aug 10.
4	Marcham (Phase 2) - Classrooms	350	344	344	320	-30	-24	-24	Complete Sept 09.
5	Launton - Hall & Classroom	900	250	250	111	-789	-139	-139	On-site. Deferred due to outcome of conclusion of primary locality review.
6	Harwell - 2 Classroom extension	350	200	200	147	-203	-53	-53	On-site. Delay in finalisation of contract price.
7	Tackley - 2 Classroom extension & Pre-School Accommodation	0	200	150	191	191	-9	41	Early commencement of enabling works (including relocation of temporary classroom) in summer works due to health & safety.
8	Secondary Capital Programme Wantage, Fitzwaryn - Phase 1	1,725	1,756	1,720	1,713	-12	-43	-7	Complete Jan 10.
9	Woodstock, Marlborough - Science & Repl Temporary Buildings	2,978	1,700	1,700	1,443	-1,535	-257	-257	Slippage due to environmental issues and scheme being divided into 3 phases with Phase 2 and 3 costing £600k. Weather conditions delayed progress on site.
10	Witney, Wood Green - Changing Rooms	0	157	157	165	165	8	8	Complete May 09.
11	Oxford Academy Project	12,700	15,000	15,000	14,962	2,262	-38	-38	On-Site. Accelerated programme.
13	Chipping Norton - Science	1,200	450	450	192	-1,008	-258	-258	Started April 2010. Delays in design & tendering process.
14	Burford Community College - 8 Classroom Block & Drama Studio	350	200	200	158	-192	-42	-42	Contract let, anticipated start May 10. Delay due to design changes.
15	Wantage, Fitzwaryn - Phase 2 (Modernisation & Post 16)	600	100	100	142	-458	42	42	Anticipated start Aug 10. Delay due to prolonged planning issues.
16	Provision of School Places Banbury, Hanwell Fields - Extensions	643	722	672	689	46	-33	17	Complete Sept 09.
17	Witney, Tower Hill - Extensions	569	565	565	517	-52	-48	-48	Complete Sept 09.
18	Cuttislowe - Foundation Stage Classroom	0	250	250	251	251	1	1	Complete Sept 09. New Scheme due to city primary pupil pressures.
19	Witney, Henry Box - Music	600	780	780	779	179	-1	-1	On-Site. Forecast completion Aug 10.
20	Carterton CC - Extension to hall	350	50	50	32	-318	-18	-18	Contract let, anticipated start May 10. Extended tender process.
21	Oxford, St Nicholas - 2 additional classrooms & extension to hall	0	50	50	41	41	-9	-9	
	Children's & Family Centres								

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22	Flexibility of Childcare 08/09 - 10/11	2,900	1,200	1,200	967	-1,933	-233	-233	Unrealistic programme to agree individual projects including funding agreements with external providers.
23	Children Centres 08/09 - 10/11 Phase 3	1,000	260	160	246	-754	-14	86	Previously reported as one programme until individual project approval stage.
24	North East Abingdon - Children's Centre	0	424	424	253	253	-171	-171	
25	Bloxham - Children's Centre	0	200	200	73	73	-127	-127	
26	Chalgrove - Children's Centre (P1 & P2)	0	400	400	219	219	-181	-181	
27	Bampton - Children's Centre	0	0	100	40	40	40	-60	
28	Eynsham - Children's Centre	0	0	0	48	48	48	48	
Improvements to Young People's Centres									
29	Faringdon Young People's Centre	0	120	120	119	119	-1	-1	Complete Nov 09. Work ceased in 08/09 due to contractor issues.
30	Wallingford Young People's & Children Centres	190	50	50	109	-81	59	59	
31	Witney Young People's Centre (Phase 1)	145	8	8	16	-129	8	8	Complete.
32	Berinsfield Young People's Centre	175	200	200	184	9	-16	-16	Complete Feb 10.
33	Chill Out / Youth Capital Fund	399	470	470	467	68	-3	-3	
34	Witney Young People's Centre (Phase 2)	250	75	75	3	-247	-72	-72	Anticipated start June 10. Delay due to flood analysis impact.
35	Kidlington Young People's Centre	0	250	250	101	101	-149	-149	
36	Back on Track - Mill & Vehicles	400	381	65	65	-335	-316	0	Revised Programme.
37	Banbury New Futures Centre	0	0	100	113	113	113	13	New scheme, grant funded.
38	Children Homes Development Thornbury House Children's Home - Repl of building	750	300	300	222	-528	-78	-78	Delay due to environmental issues, project slipped to 2010/11. Further slippage incurred due to extended cold weather period in undertaking Great Crested Newt trapping and access rights. Latest cost estimates now exceed feasibility & project approval budgets.
39	Annual Programmes Schools Access Initiative	1,042	1,008	858	697	-345	-311	-161	Funding of £184k transferred to individual schemes. Underspend of £161k in annual programme used as funding on other schemes.
40	Health & Safety - CYP&F	285	119	119	280	-5	161	161	Urgent work required, funded from future years Health & Safety provision.
41	Kilvrough Manor	0	241	241	220	220	-21	-21	
42	Health & Safety - Corporate	554	300	300	366	-188	66	66	

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43	Temporary Classrooms - Relocation & Removal	500	548	748	784	284	236	36	Urgent replacement due to Health & Safety conditions and opportunity to purchase 5 units.
45	<u>Other Schemes / Programmes</u> Small Projects	1,296	1,099	1,002	965	-331	-134	-37	Original programme included £401k original budget provision for Pathfinder programme, £90k transfer from Special Needs Adaptations programme to Fitzwarren and £100k Staffing costs. New budget provision for Faringdon Infants £135k.
46	Minor Works	165	181	181	103	-62	-78	-78	
47	Loans to Foster/Adoptive Parents	150	90	90	22	-128	-68	-68	
48	Special Schools (16-19)	0	453	453	500	500	47	47	Programme to deliver temporary classroom's not identified at three schools.
49	14 - 19 Rural Areas	0	120	50	0	0	-120	-50	New grant - slippage due to deliverability of Charbury Skills Centre.
50	14-19 Diploma	415	355	355	335	-80	-20	-20	
51	Play Pathfinder	0	955	955	955	955	0	0	New grant award. Release of grant to related partners including district & parish councils.
52	Short Breaks (AHDC)	0	299	299	251	251	-48	-48	New grant award. Carry forward request approved by grant provider.
53	Woodlands Outdoor Education Centre	375	190	190	275	-100	85	85	
54	<u>ICT</u> Harnessing Technology Grant	1,283	1,283	1,283	1,551	268	268	268	Accelerated spend from 10/11 grant allocation.
55	Home Access for Targeted Groups	0	213	213	226	226	13	13	Grant allocation slipped from 08/09.
56	<u>Retentions & Oxford City School Reorganisation</u> Retentions	576	1,240	1,240	736	160	-504	-504	Slippage and underspends on various schemes, including St Birinus (Science) - internal alterations £200k and Children Centres £100k.
57	Oxford City Schools Reorganisation	0	58	58	0	0	-58	-58	
	Sub-Total CYP&F	37,215	37,335	36,836	34,433	-2,782	-2,902	-2,403	
						-7%	-8%	-7%	
58	<u>School Capital</u> Devolved Formula	9,867	9,564	9,564	9,893	26	329	329	School local spend. Schools had available a further 40% from 10/11 allocation.
59	Harnessing Technology Grant	1,392	1,392	1,392	1,316	-76	-76	-76	School local spend
60	Specialist Sports College	0	350	350	6	6	-344	-344	New grant award - ATP at Wallingford School
61	Kitchen & Dining improvements	0	200	200	73	73	-127	-127	New grant award.

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62	14-19 Diploma	0	600	600	442	442	-158	-158	Grant previously shown in CYP&F in 10/11 brought forward & transferred for school managed schemes.
	Sub-Total Schools	11,259	12,106	12,106	11,730	471	-376	-376	
	CYP&F Capital Programme Total	48,474	49,441	48,942	46,163	-2,311	-3,278	-2,779	
						-5%	-7%	-6%	
	Technical accounting adjustments								
63	Efficiency Savings	300	0	0	0	-300	0	0	
64	Property Client Fee	640	0	0	0	-640	0	0	
65	Fees	324	0	0	0	-324	0	0	
66	Tugwell	126	0	0	0	-126	0	0	
67	Performance Reward Grant	0	0	0	487	487	487	487	
68	SO&P Staffing	0	0	0	117	117	117	117	
	Sub-total	1,390	0	0	604	-786	604	604	
	CYP&F Capital Programme Total (including technical accounting adjustments)	49,864	49,441	48,942	46,767	-3,097	-2,674	-2,175	
						-6%	-5%	-4%	

Funding provision for capital costs

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(1)	Primary Capital Programme Primary School Review - Bayards	300	300	300	78	-222	-222	-222	Extended consultation due to Sport England planning objection despite earlier positive consultation. Approved at planning committee April 10. Passed to GOSE to determine if it requires referral to Secretary of State for determination. Early commencement of enabling works and design fees not included in original programme.
	- Wood Farm	0	300	300	477	477	177	177	
	- Rose Hill				20	20	20	20	
	- St Andrew's, Chinnor				18	18	18	18	
	Primary Replacement of Temps	0	100	100	102	102	2	2	
	- The Grange	0	25	25	5	5	-20	-20	
	- Great Milton	0	0	0	18	18	18	18	
	- Tackley	0	0	0	9	9	9	9	
	- Mill Lane				0	0	0	0	
	- Garsington				0	0	0	0	
	Eynsham	100	0	0	0	-100	0	0	Provision moved to Provision of School Places as subject to future growth in Eynsham.
	Peppard	200	50	50	4	-196	-46	-46	Scheme delayed waiting outcome of option appraisal and outcome of conclusion of primary locality review.
(2)	Secondary Capital Programme Warriner	0	0	0	9	9	9	9	
	Special Schools Modernisation	0	200	0	0	0	-200	0	
	- Woodeaton Manor				167	117	117	117	
	Lord Williams - Autism Unit	50	50	50	49	49	-1	-1	
	St Birinus - Food Technology	100	0	0	5	-95	5	5	
	Iffley Mead - Food Technology	0	50	50	7	7	7	7	
	Secondary Modernisation	0	0	0	0	0	0	0	
(3)	Provision of School Places Carterton Community College - Hall Bicester, Gavray Drive - 7 classroom Witney, Madley Brook - 3 classroom extension	0	0	0	0	0	0	0	
		0	0	0	-17	-17	-17	-17	
		0	50	50	0	0	-50	-50	

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	Existing demographic pupil provision Primary Areas St Nicholas Secondary - Bicester, Cooper - Wheatley Park (Hall)	40 0 0 200 0	0 0 0 150 0	0 0 0 150 0	0 0 0 162 15	-40 0 0 -38 15	0 0 0 12 15	0 0 0 12 15	
(7)	Halls & Kitchens Hornton - Hall	0	0	0	5	5	5	5	
(13)	Improvement of Young People's Centres								
	Abingdon (incl BoT Grant £250k) Didcot (incl BoT Grant £350k)	0 300	0 0	0 0	5 0	5 -300	5 0	5 0	Revised programme as linked with Back on Track programme.
	Banbury New Futures Centre Chipping Norton Young People & Adult Learning Centre	0 0	100 25	0 25	0 8	0 8	-100 -17	0 -17	
(16)	Specific / Delegated Funding Targeted Capital - SEN	0	50	50	42	42	-8	-8	
	CYP&F Capital Programme Total	1,290	1,450	1,150	1,188	-102	-262	38	
						-8%	-18%	3%	

Social & Community Services Capital Programme Provisional Outturn 2009/10

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	Community Services								
1	Banbury Library & Arts Centre	50	25	25	0	-50	-25	-25	
2	Bicester Library	20	20	0	0	-20	-20	0	
3	Central Library Refurbishment	69	20	8	8	-61	-12	0	
4	Chalbury Library	0	0	0	0	0	0	0	
5	Headington Library	196	20	5	4	-192	-16	-1	Work delayed by slow lease negotiations with City Council
6	Thame Library	1,344	1,290	1,290	1,049	-295	-241	-241	Work has progressed in line with project timescale until the last month. Completion now due July 2010.
7	Watlington Library	450	500	330	304	-146	-196	-26	Work has been delayed as a result of unforeseen circumstances associated with drainage and the overall age of the building.
8	Library Refurbishment Programme	250	220	100	101	-149	-119	1	The removal of most of the improvement capital from the programme led to the cancellation of all remaining work planned for 2009-10 in order to secure the remaining capital to support the changes required for RFID
9	RFID (Radio Frequency Identification) - Self service in Libraries	0	0	0	0	0	0	0	
10	County Heritage & Arts Abingdon Museum (Contribution)	100	0	0	0	-100	0	0	English Heritage (EH) Commissioners rejected the original plans; these have now been revised and approved by EH and the Heritage Lottery Fund. Abingdon Town Council, leading this project, is going ahead. First grant request is expected in 2010/11
11	Museums Resource Programme	423	100	48	78	-345	-22	30	Planning problems delayed this programme and led to revisions to plans which the architects have struggled to keep within budget. The work should be completed within 2010/11
12	Development Project - SOFO	0	15	15	15	15	0	0	
13	Pegasus Theatre (Contributions)	541	540	502	502	-39	-38	0	
14	Cogges Manor Farm	65	65	0	0	-65	-65	0	Capital work has been delayed as a result of the detailed business planning process undertaken by the Shadow Board in preparation for handover from the County Council in 2010/11
15	Oxfordshire Records Office	0	0	0	6	6	6	6	
		3,508	2,815	2,323	2,067	-1,441	-748	-256	

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	Social Care for Adults								
16	Mental Health Mental Health Projects	177	177	177	177	0	0	0	
17	Residential Bicester Care Home (Forward Funding)	895	500	500	536	-359	36	36	£178k accelerated spend in 08/09 Serious delays to the project caused by newts, badgers, wet weather and need to secure an alternative drainage solution.
18	HOPs Phase 1 - New Builds	0	0	0	0	0	0	0	
19	HOPs Phase 2 Strategy	0	0	0	0	0	0	0	
20	Deficit Funding Agreement	0	0	0	0	0	0	0	
21	Homes for Older People - Extra Care Housing	250	50	50	14	-236	-36	-36	This spend is for core and cluster ECH. The Greater Leys spend has been agreed but will not be spent in advance but until works start later in 2010/11
22	Homes for Older People - Extra Care Housing (Banbury)	0	675	675	675	675	0	0	New scheme - grant funded. £675k has been spent in 09/10 and the remaining £675k will be spent on build completion in 10/11.
23	ECH - Care Facilities Additions Programme	0	0	0	0	0	0	0	
24	ECH - Land Acquisition Programme	0	0	0	0	0	0	0	
25	Learning Disabilities - Supported Living	480	240	227	223	-257	-17	-4	We are aiming to increase the economies of scale in several supported living properties. This work is being done in partnership with several Registered Social Landlords who own the properties, and external support providers who are providing support within the properties. Prior to commencing any works, we also have to assess and consult service users with learning disabilities (and their family carers) who are living in the properties. This work has not been done before on this scale, and as such we have learned that we need to reduce our expectations in relation to how many houses can be increased in size in each year.
	Day Centres								
26	Abingdon, Resource Centres (Phase 1-3)	997	622	580	580	-417	-42	0	Delay to the start of Phase 3 due to need to reduce project costs to stay within budget.
27	Banbury Day Centre (OP)	50	50	50	0	-50	-50	-50	
28	Rural Day Centres (OP)	30	30	5	3	-27	-27	-2	
29	Wantage Day Centre (OP & LD)	0	0	0	0	0	0	0	
30	Day Centre (OP)	100	0	0	0	-100	0	0	Not real slippage as budget was reduced as part of Star Chamber decision

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31	Day Centres (LD)	100	50	5	37	-63	-13	32	Not real slippage as budget was reduced as part of Star Chamber decision
		3,079	2,394	2,269	2,245	-834	-149	-24	
	Strategy & Transformation								
	ICT								
32	Supporting People	48	48	0	0	-48	-48	0	Adult Social Care Systems Review project delayed due to resource being required to work on other urgent project therefore project spend slipped.
33	Time to Change	0	57	15	15	15	-42	0	
34	Adult Social Care - IT Infrastructure	268	100	102	85	-183	-15	-17	
35	New Adult ICT Services System	580	50	85	103	-477	53	18	
36	Mobile Working Project	50	24	22	22	-28	-2	0	
		946	279	224	225	-721	-54	1	
	Retentions (Including Fees) & Minor Works								
37	Retentions	201	183	183	219	18	36	36	
38	Minor Works	202	319	319	230	28	-89	-89	
39	HOP's Externalisation	0	75	75	54	54	-21	-21	
		403	577	577	503	100	-74	-74	
40	Property Client Fees	10	0		0	-10	0	0	
	S&CS Capital Programme Total	7,946	6,065	5,393	5,040	-2,906	-1,025	-353	
						-37%	-17%	-7%	
	Technical accounting adjustments								
	Treatment of CSDP loans as capital expenditure	0	0	0	181	181	181	181	
	Sub-total	0	0	0	181	181	181	181	
	S&CS Capital Programme Total (including technical accounting adjustments)	7,946	6,065	5,393	5,221	-2,725	-844	-172	
						-34%	-14%	-3%	

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	Retentions from LTP1 schemes		197	59	57	57	-140	-2	Outstanding compulsory purchase orders at Didcot Milton Heights which are unlikely to be resolved before the end of the financial year.
	LTP2								
	Network Development								
	Thornhill P & R	15	26	26	23	8	-3	-3	
	A40 Green Road Roundabout		15	20	14	14	-1	-6	
	Congestion Monitoring ANPR		2	2	2	2	0	0	
	TNR Routing	62	50	43	43	-19	-7	0	
	Oxford VMS	250	200	215	217	-33	17	2	
	Chipping Norton AQMA	290	129	40	35	-255	-94	-5	Implementation will now take place under the new contractor.
	Wallingford AQMA	248	22	25	26	-222	4	1	Costs lower than original estimate. Delivery will now fall in 2010/11.
	Thornhill P & R extensions (project development)		82	110	108	108	26	-2	Project development expenditure brought forward scheme progressing more quickly than anticipated
	TMC Network Improvements	0	103	105	106	106	3	1	Not originally included: Installation of traffic congestion cameras purchased in 2008/09.
	Chiltern Cycle Way			2	2	2	2	0	
	Road Safety								
	Oxford Transport Strategy								
	High St (contribution to HM scheme)	229	0	0	0	-229	0	0	£235k of budget transferred to other schemes.
	Summertown	34	50	43	40	6	-10	-3	Budget transferred to main scheme under Highways Maintenance
	Fairfax Rd/Purcell Rd Cycle Link	205	0	1	1	-204	1	0	Slippage due to design changes required following consultation
	Old Rd/Windmill Rd Cycle Link	0	35	35	7	7	-28	-28	
	Other Cycle Improvement schemes	30	3	3	2	-28	-1	-1	
	Controlled Parking Zones	376	138	138	125	-251	-13	-13	Schemes were required to go back to public consultation.
	Highfield Area Traffic Management	116	5	5	0	-116	-5	-5	Slippage due to design changes required following consultation
	Central AQMA	100	53	0	0	-100	-53	0	Expenditure is revenue in nature therefore has been funded from the revenue budget.
	London Rd corridor - phase 2	554	600	600	585	31	-15	-15	Delayed by 2 months following public consultation to properly address the issues which the public raised.
	London Rd corridor - phase 3	520	180	292	346	-174	166	54	Purchase of equipment and works from statutory undertakers brought forward.

Transport Capital Programme Provisional Outturn 2009/10

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	New Inn Hall Street (West End) Speedwell Street/St Aldate's (West End)	164 0	466 121	466 121	440 133	276 133	-26 12	-26 12	Slippage from 08/09 Correction to forecast (split of costs between ITS & HIM)
	Transform Oxford Queens Street Frideswide Square (project development)	825 135	985 136	1,063 46	1,060 34	235 -101	75 -102	-3 -12	Costs higher than original estimate Validation of modelling work has taken longer than anticipated therefore delayed the start of the detailed design process.
	Towns Programme Abingdon Abingdon Town Centre Abingdon secondary cycle routes Marcham Rd Ph 2	540 0 185	540 11 210	540 11 141	537 10 145	-3 10 -40	-3 -1 -65	-3 -1 4	Problems have been encountered with statutory undertakings.
	Banbury Western Corridor Hanwell Fields Mineral Railway Merton Street One way scheme Henley	0 0 0	1 0 41	1 0 39	2 0 37	2 0 37	1 0 -4	1 0 -2	
	Town Centre Witney Cogges Link Road	134 1,033	280 790	245 790	243 846	109 -187	-37 56	-2 56	Slippage from 08/09 Town Green Planning Application has delayed the publishing of the Compulsory Purchase Order and Side Road Order. This in turn resulted in the overall scheme programme delay of 6 months.
	Woodford Mill Pedestrian Cycle Route Downs Road	0 0	1 9	13 44	13 44	13 44	12 35	0 0	Project development expenditure brought forward.
	Bicester Bicester Roman Road Wantage/Grove Limborough Road Pedestrian crossing Carterton	0 0 0	2 0 0	10 0 0	7 1	7 1	5 1	-3 1	
	NE Carterton Cycle Links Carterton B4477 upgrade Carterton Link Rd/Burford Rd Jn Other Towns Ambrosden, pedestrian refuge Sutton Courtney Footpath Adderbury A4260 Twyford Pedestrian crossing	0 0 0 0 0 0	5 23 0 3 15 0	5 23 0 3 15 6	5 0 2 3 13 6	5 0 2 3 13 6	0 -23 2 0 -2 6	0 -23 2 0 -2 6	

Ref	Scheme	Original Capital Programme (Dec 2008) £000	Latest Capital Programme (Dec 2009) £000	Latest Forecast Position (Feb 2010) £000	Actual Expenditure 2009/10 £000	Variation to original Capital Programme £000	Variation to latest Capital Programme £000	Variation to latest Forecast Position £000	Comments
	Public Transport								
	Yarnton-Pear Tree Bus Priority	33	0	0	0	-33	0	0	Project removed
	Premium Routes upgrade	421	437	336	334	-87	-103	-2	One week slippage due to the cold weather. Suitable stopping point under the existing contract has had to be implemented for some schemes.
	Iffley Rd donnington bridge jn	0	226	226	214	214	-12	-12	Scheme not included in original programme
	Public Transport Information Project	288	288	288	285	-3	-3	-3	
	Rail Station Development	176	125	125	124	-52	-1	-1	Expenditure was brought forward from 09/10 to 08/09.
	Didcot Station Forecourt	3,943	536	440	435	-3,508	-101	-5	Detailed design and procurement stages, as estimated by original consultant, were too short. The scheme design has now been passed on and reprogrammed by Jacobs. The new programme now shows a setback of 8 months when compared to the original dates.
	Smarter Choices (BWTS)	850	716	654	625	-225	-91	-29	£100k of budget transferred to other schemes. Some schemes completed substantially below original estimate.
	Salaries	638	632	632	545	-93	-87	-87	Balanced by overspend in highways maintenance
	Abbey Centre (Abingdon Depot)	100	0	0	0	-100	0	0	Transferred to BOP.
	Tugwell Field Access Road	0	224	224	222	222	-2	-2	Transferred from CYPF programme.
	Integrated Transport Strategy Total	13,459	9,390	8,950	8,785	-4,674	-605	-165	
						-35%	-6%	-2%	

Ref	Scheme	Original Capital Programme (Dec 2008) £000	Latest Capital Programme (Dec 2009) £000	Latest Forecast Position (Feb 2010) £000	Actual Expenditure 2009/10 £000	Variation to original Capital Programme £000	Variation to latest Capital Programme £000	Variation to latest Forecast Position £000	Comments
	Structural Maintenance								
	Carriageways	1,630	1,771	1,744	1,716	86	-55	-28	Accelerated funding
	Footways	2,100	2,257	2,269	2,290	190	33	21	Accelerated funding
	Surface Treatments	3,021	3,202	3,217	3,157	136	-45	-60	Accelerated funding
	Structural Patching	0	368	387	359	359	-9	-28	Accelerated funding
	Bridges	2,800	2,031	1,214	1,194	-1,606	-837	-20	Slippage and underspends on various schemes
	Drainage	168	806	806	658	490	-148	-148	Additional TAMP grant funding used to bring forward schemes.
	St Lighting Column replacement	491	550	550	522	31	-28	-28	
	Cumnor Hill	450	350	376	389	-61	39	13	
	A420 Lower Bourton Junction	0	620	574	580	580	-40	6	Scheme not included in original programme as grant not yet announced.
	A40 (Headington - M40)	0	100	83	79	79	-21	-4	Design work brought forward
	A422 Ruscot Avenue, Banbury	0	90	87	113	113	23	26	Design work brought forward
	A4158 Oxford Iffley Road (design)	0	30	30	8	8	-22	-22	Design work brought forward
	St Aldates Phase 2	113	100	128	42	-71	-58	-86	Correction (split of costs between ITS & HM)
	High Street Phase 3	1,262	1,878	1,778	1,806	544	-72	28	Increased cost in relation to landfill tax charges for disposal of hazardous materials - cost contained within original budget.
	Principle Roads	0	23	25	26	26	3	1	
	Other HQ Items	462	393	375	511	49	118	136	Overspend on capitalised salaries, balanced by underspend in ITS.
	Structural Maintenance Total	12,497	14,569	13,643	13,450	953	-1,119	-193	
						8%	-8%	-1%	
	Transport Capital Programme Total	25,956	23,959	22,593	22,235	-3,721	-1,724	-358	
						-14%	-7%	-2%	
	Capital revenue switch adjustments								
	Highways Maintenance Efficiency Saving		200	200	200	200	0	0	
	Access to Oxford	450	650	650	650	200	0	0	Project development expenditure brought forward.
	Sub-total	450	850	850	850	400	0	0	
	Transport Capital Programme Total (including Capital Revenue Switches)	26,406	24,809	23,443	23,085	-3,321	-1,724	-358	
						-13%	-7%	-2%	

Environment & Economy (Other) Capital Programme Provisional Outturn 2009/10

Annex 10

Ref	Scheme	Original Capital Programme (Dec 2008) £000	Latest Capital Programme (Dec 2009) £000	Latest Forecast Position (Feb 2010) £000	Actual Expenditure 2009/10 £000	Variation to original Capital Programme £000	Variation to latest Capital Programme £000	Variation to latest Forecast Position £000	Comments
	Property								
	Carbon Management								
	Energy Conservation (Prudentially funded)	200	150	150	144	-56	-6	-6	
	Street Lighting (Prudentially funded)	0	0	40	40	40	40	0	
	SALIX	300	323	184	161	-139	-162	-23	Agreements in place, but work will not take place until next year.
	Carbon Management Fund	100	0	0	0	-100	0	0	Allocated to projects
	Energy Bus	0	102	82	82	82	-20	0	
	Automated Monitoring & Targeting	0	68	68	68	68	0	0	
	Subtotal Carbon Management	600	643	524	495	-105	-148	-29	
	BOP								
	Southern Area Offices	0	0	0	1	1	1	1	
	Banbury Office	3,108	3,320	3,320	3,375	267	55	55	Project completed and staff occupation has commenced. Some remaining fit out works will take place in 2010/11. Overspend due to delays caused by the weather and relocation of the electricity sub station.
	County Hall	1,526	1,318	1,454	1,452	-74	134	-2	Final Project Cost. Overspend due to £92k for works/fees (including changes to the CEO area and upgrades to the reception area), £15k for furniture and £29k for removals.
	East Oxford Office - Knights Court	0	84	84	65	65	-19	-19	Remaining fee charges - project completed in 2008/09.
	Oxford Options	1,091	826	726	730	-361	-96	4	Lower tender cost than estimated. Programme slipped by one month due to weather conditions and client changes.
	Oxford Options - Laundry	0	148	148	175	175	27	27	Relocation of staff from Westgate and Crown House delayed.
	Youth Offending Service	150	0	0	1	-149	1	1	Not included in the original programme.
	Trading Standards	0	405	350	218	218	-187	-132	Installation of furniture and ICT took place in April 2010.
	Subtotal BOP	5,875	6,101	6,082	6,017	142	-84	-65	

Environment & Economy (Other) Capital Programme Provisional Outturn 2009/10

Annex 10

Ref	Scheme	Original Capital Programme (Dec 2008) £000	Latest Capital Programme (Dec 2009) £000	Latest Forecast Position (Feb 2010) £000	Actual Expenditure 2009/10 £000	Variation to original Capital Programme £000	Variation to latest Capital Programme £000	Variation to latest Forecast Position £000	Comments
	Other Projects								
	Contributions to Chipping Norton Town Partnership Programme	120	0	0		-120	0	0	Reprofiled to 2010/11.
	Oxford Castle Education Centre	66	0	0		-66	0	0	Budget no longer required - removed from capital programme
	Redbridge Hollow - Fly Tipped Waste	1,170	427	359	323	-847	-104	-36	Final cost of work to clear fly-tipped waste (contract let at significantly lower cost than the budget provision). Further £40k to be spent on site security measures.
	Relocation of Countryside Services	500	237	5	4	-496	-233	-1	Estimated cost reduced by £140k. The lease has now completed and the property secured but this is later than planned due to prolonged negotiations over rights of way, resulting in a delay to the fit-out expenditure into 2010/11.
	Bampton Community Facility		20	20	1	1	-19	-19	Not included in the original programme.
	Chipping Norton Access Road		283	283	283	283	0	0	
	Annual Programmes								
	Backlog Maintenance (Prudentially funded)	4,653	5,385	5,553	5,540	887	155	-13	£1m accelerated funding. Works previously expected to take place as part of a CYPF major project have now been completed as part of this programme.
	Minor Works	500	468	403	271	-229	-197	-132	Lack of appropriate resources at consultants to enable delivery of the commissioned programme.
	Health & Safety (Non-Schools)	28	28	28	55	27	27	27	
	Contingency - staff delivery	50	0	0	0	-50	0	0	
	Whole Life Value Pool-Budget Provision	100	0	0	0	-100	0	0	Budget deprioritised and removed from capital programme
	Property Consultant Fees to be allocated				40	40	40	40	
	Property Capital Programme Total	13,662	13,592	13,257	13,029	-633	-563	-228	
						-5%	-4%	-2%	

Ref	Scheme	Original Capital Programme (Dec 2008) £000	Latest Capital Programme (Dec 2009) £000	Latest Forecast Position (Feb 2010) £000	Actual Expenditure 2009/10 £000	Variation to original Capital Programme £000	Variation to latest Capital Programme £000	Variation to latest Forecast Position £000	Comments
	Waste Management								
	Oakley Wood WRC Redevelopment	500	729	747	715	215	-14	-32	Some expenditure originally forecast in to fall in 2010/11, but the project was been completed this year.
	Redbridge WRC	690	65	10	1	-689	-64	-9	Profiles reviewed and corrected.
	Kidlington WRC	0	140	10	0	0	-140	-10	
	Dean Pit WRC Relocation	0	100	10	0	0	-100	-10	
	Oxford Waste Partnership PRG allocation	0	384	384	385	385	1	1	OWP New Initiative Fund bids approved.
	Waste Capital Programme Total	1,190	1,418	1,161	1,101	-89	-317	-60	
						-7%	-22%	-5%	
	E&E (Other) Capital Programme Total	14,852	15,010	14,418	14,130	-722	-880	-288	
						-5%	-6%	-2%	
	Capital revenue switch adjustments								
	BOP Capital Revenue Switch	233	795	795	617	384	-178	-178	Spend on dilapidations and disposals costs less than estimated.
	Disposal costs		97	97	164	164	67	67	Amount of fee saving on capital schemes less than originally estimated due to the number of large schemes not being placed with the main consultant.
	Efficiency Savings		370	335	46	46	-324	-289	
	Sub-total	233	1,262	1,227	827	594	-435	-400	
	E&E (Other) Capital Programme Total (Including Capital Revenue Switches)	15,085	16,272	15,645	14,957	-128	-1,315	-688	
						-1%	-8%	-4%	

Community Safety & Shared Services Capital Programme Provisional Outturn 2009/10

Annex 10

Ref	Scheme	Original Capital Programme (Dec 2008) £000	Latest Capital Programme (Dec 2009) £000	Latest Forecast Position (Feb 2010) £000	Actual Expenditure 2009/10 £000	Variation to original Capital Programme £000	Variation to latest Capital Programme £000	Variation to latest Forecast Position £000	Comments
	Fire & Rescue Service								
	Banbury Fire Station - New Dimension	20	1	1	1	-19	0	0	
	Radio Replacement Scheme	0	14	14	14	14	0	0	
	Critical Works - W.C/Shower Facilities	59	61	0	0	-59	-61	0	Project is now being progressed with property services.
	Minor Works - Day Crewing Houses Flood Defence Works	0	30	0	0	0	-30	0	Project will no longer take place. No suitable measures could be identified.
	Minor Works - Slade incident Command Suite	0	32	32	43	43	11	11	Additional ICT costs
	Bicester Fire Station Upgrade	35	20	20	3	-32	-17	-17	
	Wallingford Fire Station	10	10	10	0	-10	-10	-10	
	Thame Fire Station	50	25	25	0	-50	-25	-25	
	Subtotal Fire & Rescue Service	174	193	102	61	-113	-132	-41	
	Gypsy & Traveller Sites								
	Redbridge Hollow Traveller Site	69	69	0	2	-67	-67	2	Remaining grant funding was not confirmed until February 2010.
	Refurbishment of Amenity Units	0	126	0	0	0	-126	0	Work to clear site of fly tipped waste completed later than originally planned.
	Redbridge Hollow Additional Pitch	0	0	0	0	0	0	0	
	Subtotal Gypsy & Traveller Sites	69	195	0	2	-67	-193	2	
	Safer Stronger Communities								
	Safer Stronger Communities Grant	0	201	201	201	201	0	0	Not included in original programme as grant funding not yet announced.
	Shared Services - Food With Thought								
	School Kitchen & Dining Improvements	0	400	400	411	411	11	11	Not included in original programme as grant funding not yet announced.
	CC&SS Capital Programme Total	243	989	703	675	432	-314	-28	
						178%	-32%	-4%	

Ref	Scheme	Original Capital Programme (Dec 2008) £000	Latest Capital Programme (Dec 2009) £000	Latest Forecast Position (Feb 2010) £000	Actual Expenditure 2009/10 £000	Variation to original Capital Programme £000	Variation to latest Capital Programme £000	Variation to latest Forecast Position £000	Comments
	ICT								
	SAP Support Contract - Software Licences	0	1,887	1,887	1,887	1,887	0	0	Early repayment of SAP and associated software licences to be funded through prudential borrowing. This will give a net revenue saving of £155k on interest payments from January 2010 to September 2012 when the current contract for SAP support ends.
	ICT Data Centre	0	0	0	1	1	1	1	
	CC Capital Programme Total	0	1,887	1,887	1,888	1,888	1	1	
	Capital revenue switch adjustments					100%	0%	0%	
	ICT Hardware & Software	1,000	1,000	1,000	1,000	0	0	0	£1m capital funding of capitalised revenue expenditure, balance funded by revenue budget.
	Sub-total	1,000	1,000	1,000	1,000	0	0	0	
	CC Capital Programme Total (including Capital Revenue Switches)	1,000	2,887	2,887	2,888	1,888	1	1	
	Technical accounting adjustments					189%	0%	0%	
	Oxford City Council ICT hardware (loan)	0	0	0	1,298	1,298	1,298	1,298	To be repaid over five years.
	Sub-total	0	0	0	1,298	1,298	1,298	1,298	
	CC Capital Programme Total (including technical accounting adjustments)	1,000	2,887	2,887	4,186	3,186	1,299	1,299	
						319%	45%	45%	

Division(s): N/A

CABINET – 22 JUNE 2010

FINANCIAL MONITORING REPORT

Report by Assistant Chief Executive & Chief Finance Officer

Introduction

1. This is the first financial monitoring report for the 2010/11 financial year and covers the period up to the end of April 2010 for both revenue and capital budgets. Since it is difficult to forecast the year-end outturn based on a single month of expenditure and income the report focuses on key risk areas and areas of emerging pressures identified by Directorates, along with plans to manage these.
2. The 2010/11 revenue budget was approved by Council on 9 February 2010. Subsequent budget reallocations to reflect changes to inflation in 2010 were approved as part of the Financial Monitoring Report to Cabinet on 20 April 2010 (see paragraphs 97 – 101). A further change has been made to the published Service and Resource Planning – Service Analysis 2010/11 to reflect the most up-to-date information about Dedicated Schools Grant income.
3. Requests for carry forwards of under and overspends from 2009/10 to 2010/11 are included in the Provisional Outturn Report which is a separate item on the agenda. Virements within Children, Young People & Families and Social & Community Services that are over £0.5m, upon which the carry forwards are dependent, will subject to approval by Council on 14 September 2010.
4. If approved the carry forwards will be reflected in the monitoring to the end of June, with the exception of those which require Council approval. These will be reflected in the monitoring report to the end of September.
5. Following the coalition Government's announcement that savings of £6.5bn will need to be made in 2010/11, £1.165bn has been allocated to Local Government. The detail available so far is set out in Part 3 of this report. Although there will be no change in the budget requirement the grant reductions will be reflected as virements changing both income and expenditure. Since these are likely to require, or include, changes in policy they will need to be agreed by Cabinet in July and subsequently by Council.
6. The following annexes are attached:

Annex 1 (a-d):	Virements and Supplementary Estimates
Annex 2 (a-c):	Specific and Area Based Grants Monitoring
Annex 3:	Treasury Management Lending List

Part 1: Revenue Budget

7. The table below summarises the budget for 2010/11 for each Directorate as agreed by Council and shown in the Council's Service and Resource Planning publications for 2010/11 – 2014/15.

	Original Budget 2010/11		
	Gross Expenditure £m	Income £m	Net Expenditure £m
Children, Young People and Families	581.9	-482.8	99.1
Social & Community Services	237.8	-54.1	183.7
Environment & Economy	99.3	-28.9	70.4
Community Safety & Shared Services	52.4	-24.3	28.1
Corporate Core	38.6	-29.0	9.6
Directorate Budgets	1010.0	-619.1	390.9
Area Based Grant (ABG)			-45.6
Strategic Measures			37.9
Contributions to/from reserves			6.7
Total Budget Requirement			389.9

Children, Young People & Families

8. The Directorate is not currently forecasting an in-year variation on its budget. The City Schools Reorganisation overspend will be carried forward from 2009/10. The balance remaining in 2010/11 is £0.178m and will be full repaid in 2011/12.
9. The financial restructuring project is due to be completed in June 2010. This project has aligned the budget with the Directorate's management structure. This will enable improved accountability and robust monitoring to take place. For financial monitoring and reporting purposes the Directorate will continue to report variations on a functional basis, in line with the published budget figures, although reference will be made to significant variances within localities. In addition it is intended that future reports will contain a clearer division between services funded by Dedicated Schools Grant (DSG) and those funded by the local authority.
10. A comprehensive review of the Children's Social Care budgets is currently being undertaken. This includes children looked after, family support and assessment, and safeguarding. As part of the Service & Resource Planning process for 2010/11 the service as a whole was allocated additional funding of £4.1m in respect of the level of pressures being incurred.
11. In previous years the Home to School Transport budget has realised significant year-end variances. This was repeated in 2009/10 with the service underspending by -£1.491m, including -£0.371m on services funded by area based grant (ABG). In future years of the medium term financial plan the

service is committed to making £2m of savings. Since there has only been a slight change in the service's budget in 2010/11 it is likely that a significant underspend will be achieved again.

Social & Community Services

COMMUNITY SERVICES

12. Adult Learning overspent by +£0.233m in 2009/10. The overspend will be brought forward to 2010/11 and a recovery plan is in place to bring the budget into balance and repay the remaining £0.101m balance of the supplementary estimate originally agreed in July 2006, along with a further £0.080m agreed in April 2009, by March 2013. This plan will be kept under review throughout the year.
13. The overspend of +£0.122m on the Music Service budget in 2009/10 will be carried forward to 2010/11. A four year Music Service Change Programme was drawn up in 2009/10 with the aim of bringing the service to a break-even position over this period so, as with Adult Learning, the overspend will be recovered by March 2013.

ADULT SOCIAL CARE

14. The 2010/11 budget agreed by Council on 9 February 2010 includes £1.4m in relation to the estimated costs of implementing the Personal Care Bill in 2010/11. In March 2010, the Department of Health issued provisional allocations for the Personal Care at Home Grant for 2010/11 to be paid as Area Based Grant. The allocation for Oxfordshire was £2.481m. This was in addition to the £1.4m Council funding.
15. The Bill was approved by Parliament on 8 April 2010 but implementation of the provisions of the Act is subject to approval by both Houses of Parliament. The new Government has announced that it will not be commencing the provisions of the act. However, it will consider what more can be done on reablement and carers' breaks in the light of available resources. The grant funding has been removed from Annex 2a and the £1.4m Council budget allocation which will not be required in 2010/11 is recommended to be transferred into the Efficiencies Reserve.
16. Self Directed Support - All local authorities are required to be able to offer personal budgets to new service users from October 2010 and existing service users are required to have been offered a personal budget by April 2011. Work is underway to develop a Resource Allocation System (RAS) which will be used to allocate individual personalised budgets. This includes decisions on the services and budgets to be included in the RAS. There are risks to service providers (both internal and external) if individual service users choose to spend their personal budgets other than on conventional services. In order to fully implement Self Directed Support budgets for Adult Social Care will be restructured during the year to reflect the roll out of

personal budgets and changes to staff structures required to implement this fully.

STRATEGY & TRANSFORMATION

17. The Strategy & Transformation budget is being revised during the year to reflect the transfer to Environment & Economy of the Facilities Management Service and the transfer of the Access team to the new Corporate Customer Services Centre.

POOLED BUDGETS

18. The following table sets out the pooled budgets for 2010/11.

	OCC Contribution £m	PCT Contribution £m	Total Pooled Budget £m
Older People	81.870	17.917	99.787
Physical Disabilities	7.102	4.047	11.149
Equipment	1.169	0.312	1.481
Total Older People's, Physical Disabilities and Equipment Pool	90.141	22.276	112.417
Learning Disabilities	42.416	31.678	74.094

19. The Primary Care Trust (PCT) contribution to the Older People's, Physical Disabilities and Equipment Pooled Budget is £22.276m. This is £2m lower than the original contribution for 2009/10. During 2009/10 additional contributions of £6.487m were made. Expenditure was £32.079m resulting in an overspend of £1.316m to be carried forward to 2010/11.
20. The additional costs in 2009/10 related mainly to Continuing Health Care. Although the number of new clients being awarded Continuing Health Care has reduced over that period and reviews of existing clients are being undertaken the financial impact is not yet reflected in the monthly spend. Very significant reductions in spending will have to be made to bring the PCT expenditure into line with the budget provision for 2010/11.
21. The Council's share of the budget will also be under considerable pressure in 2010/11. The 2009/10 budget was overspent by £0.790m despite additional contributions of £1.220m¹ being made during the year. The 2010/11 contribution to the pool is similar to the total contribution for 2009/10.

¹ As set out in paragraph 33 & 34 of the Financial Monitoring Report to Cabinet on 16 February 2010

22. The pressures on the Council share of the pool in 2010/11 include:
- The impact of the withdrawal of Continuing Health Care funding from clients who may then qualify for social care funding. This could be in excess of £1m.
 - The cost of Section 117 clients transferring from the PCT. This has not yet been calculated.
 - Additional demands on both Internal and External Home Support due to increasing client numbers and the pressure to minimise delayed transfers of care
 - Increased client numbers and higher cost packages for clients with Physical Disabilities
 - Increasing demands for equipment
23. The PCT contribution to the Learning Disabilities Pooled Budget has increased by £0.573m on the original contribution for 2009/10 and by £0.081m compared to the final contribution. The Learning Disabilities Pooled Budget is under severe pressure to achieve savings to meet pressures in 2010/11 and future years. An Efficiency Savings plan is in place and is being monitored by the Joint Management Group on a monthly basis.

Environment & Economy

TRANSPORT

24. The new transport contract, which started at the beginning of the financial year, should be fully implemented by the end of August 2010. It is anticipated that any financial benefit will be re-invested into the service to support the potential for reducing the future year operating costs of the contract.
25. It is anticipated that the cost of implementing the transfer of responsibility for the administration of concessionary fares will be funded through a carry forward request. However, there may be additional pressure, which it is anticipated would be funded within Transport.

SUSTAINABLE DEVELOPMENT

26. Within Sustainable Development it is anticipated that the overall level of waste disposed of will be in line with 2009/10. Any increase to the level of waste disposed of however, will put an immediate pressure on the waste budget.
27. The Waste Treatment project costs should be funded within the current budget however there is a risk that the cost of this project may exceed that budget allocation. It is anticipated that any cost pressure will be absorbed within the waste budget assuming waste tonnages are lower than anticipated.
28. Carbon Reduction management pressures have been identified and funded within the annual budget. There is a risk that the cost of developing this will be in excess of the budget agreed. The team will work to consider further potential funding options if this is realised.

PROPERTY SERVICES

29. Within Property Services any unfunded pressures of the Better Offices Programme and Facilities Management will need to be reviewed and alternative funding options considered.

Community Safety & Shared ServicesFIRE & RESCUE SERVICE

30. The Fire & Rescue Service is forecasting a nil variance at this stage of the year. It has a challenging list of efficiency savings this year but action plans are in place for their delivery. The service will need to manage the following significant known or potential pressures.
31. Delivery of the action plan drawn up in response to the recommendations of the Health & Safety Executive (HSE) following its inspection of the service. A carry forward request of £0.117m has been made to provide funding for delivery of the action plan. Failure to deliver in full could result in a formal Improvement Notice being served on the Fire Authority. The identified funding will be used to design and implement a Training Competency Framework which will ensure that personnel are able to become competent against specific safety critical competencies in and around the equipment used. It will also be used to increase the level of Breathing Apparatus training required by Retained Duty System fire-fighters to align with wholetime fire-fighters and ensure competence in this most safety critical of areas. However, the action plan has not yet been formally agreed with the HSE and as a result it is not yet known if the carry forward will meet all the actions necessary. It should also be noted that there is an ongoing cost relating to annual refresher training which will have to be met from existing training budget.
32. Changes to the national pay and conditions of retained firefighters together with their pension entitlement following the decision of an employment tribunal. A provision of £0.225m has been included in the 2009/10 accounts to cover the estimated cost of compensation payments which are backdated to July 2000. Any costs in excess of this provision will be a pressure on the service this year together with the ongoing cost of the changes in pay and conditions. These are difficult to estimate accurately until the changes are implemented.
33. An overspend of +£0.122m on the Retained Duty System (RDS) was reported last year. Management action in the latter part of the year reduced the overspend from the earlier forecast but there are continuing pressures on this budget, in particular the cost of addressing training needs. A significant proportion of the expenditure is difficult to control as it is linked directly to the number of emergency call outs. A new RDS pay system is being trialled in eight stations and will be reviewed towards the end of the financial year before a decision is made on extending it to the other retained stations.

SHARED SERVICES

34. Shared Services has an efficiency target of £0.5m in 2010/11. Some of the savings are dependent on achieving income targets and the development and implementation of new systems. Action plans are in place for all savings and progress is being tracked throughout the year.
35. The original business case savings target has now been achieved in full. If the new efficiency savings target is added (£0.686m per annum by 2012/13), the business case target of delivering a total of £27m gross savings (2005/06 prices) by March 2014 will be exceeded.

Corporate Core

36. At this stage of the year, all services in Corporate Core are forecasting nil variance against budget. However, there are risks as follows:

ICT

37. ICT is implementing an action plan to keep within budget this year. This includes a reduction in establishment and changes to directorate service level agreements to ensure that all projects are fully funded before they commence. A number of pressures will require careful management to ensure that the service remains close to target:
- The establishment target of 132 full time equivalents (FTEs) will be met by mid-summer but it will be difficult to reduce any further without a serious effect on service delivery.
 - There are likely be some redundancy costs arising from the continuing restructure of the ICT establishment but it is too early to quantify them.
 - Oxfordshire Community Network (OCN) – this should come close to budget this year but savings of over £0.3m need to be found for 2011/12.
 - Maintenance costs – some small savings have been made by ceasing contracts and this should enable spend to be kept within budget. Proposed changes to Microsoft licensing could be a very significant pressure for 2011/12.
 - An overspend against the SAP budget is expected due to pressures on staffing, licensing and the completion of the Organisational Management project
38. ICT is currently exceeding its income target although there is evidence that workload is dropping in some areas as directorates are becoming less active. At this stage of the year, ICT expects to be able to manage the pressures identified above and is forecasting nil variance against budget.

LEGAL & DEMOCRATIC SERVICES

39. There will be continuing pressures on the legal services budget in particular in the safeguarding children and planning areas. Two cases, one relating to a village green and the other a child protection case, have already been identified in these areas which are likely to cost over £0.025m. It is likely that supplementary estimates will be requested for both cases when the full costs are known.

Virements and Supplementary Estimates

40. Requests for virements are included at Annex 1a. As mentioned in paragraph 9, a review of Children's Social Care budgets is being undertaken by Children, Young People & Families. Requests include a number of changes identified already and mainly relate to the allocation of the funding agreed as part of the Service & Resource Planning process. Further virements in this service area will be requested in future reports once the review has been completed.
41. A number of virements in Children, Young People and Families are larger than £0.5m. The virement relating to Children's Centres is temporary and intended to allocate recharged grant income to individual Centres. As noted above further £0.982m is requested to be moved from Children Looked After (CYPF2-24) to Agency Residential Placements (CYPF2-25). Again, this does not change the service activity so does not constitute a policy change.
42. Virement requests for Social & Community Services include adjustments relating to the implementation of the new Alert Service. The new service brings together the council's current Telecare arrangements and the related Area Based Grant funding for the Supporting People Programme services in order to make the best use of the resources that are available. This does not constitute a change in policy, so does not need Council approval.
43. There are requests for virements relating to Facilities Management following the establishment of the corporate function within Environment & Economy Directorate. There is also a virement request relating to the transfer of the highways team from Environment & Economy to the Customer Services Centre from 1 July 2010. Again, both of these move, rather than change, the service activity.
44. There is a request to move £2.0m from the ICT Strategy Investment Fund to Human Resources for the Employee Self Service / Manager Self Service and Customer Services Centre projects. This virement does not represent a change of policy as the purpose of the budget remains the same. The budget has been moved to the service area of the Head of Human Resources who is the project sponsor.
45. Virements reducing Green Book pay inflation which were noted by Cabinet on 20 April 2010 are included for information at Annex 1c.

Grants Monitoring

46. Annex 2 details the movement on grants compared to the published Service & Resource Planning – Directorate Budgets publication. This reflects the position before any changes referred to in paragraph 5. Further changes to Grants will be reported as soon as they become available.
47. Details of specific government grants receivable in 2010/11 and the associated expenditure are included at Annex 2a. Changes to specific grants and associated expenditure are shown in Annex 2b. Annex 2c shows grants that are included in Area Based Grant.
48. Grant income carried forward from 2009/10 to be used in 2010/11 is reported to Cabinet in the Provisional Outturn Report. The carried forward amounts will be included in the grant totals in the next monitoring report.

Specific Grants

49. As per the Service & Resource Planning – Financial Plan 2010/11 – 2014/15, specific grants receivable in 2010/11 total £480.2m and include £333.4m Dedicated Schools Grant. New grants or changes to existing grants noted in this report total £1.531m.
50. £1.477m one - off grant funding relating to damage to the highway surface as a result of the cold weather was notified to us by the Department for Transport at the end of March 2010 and is required to be spent in 2010/11. The Department for Transport require a public statement by 31 October 2010 setting out how the money has been spent.

Area Based Grant

51. As shown in the Service & Resource Planning – Financial Plan 2010/11 – 2014/15 the Area Based Grant allocation for 2010/11 is £45.7m. This report notes an additional allocation of £0.064m within Children, Young People and Families. The provisional allocation of £2.481m relating to Personal Care at Home has been removed (see paragraph 14 and 15).

Strategic Measures

52. The average cash balance during April 2010 was £190.5m and the average rate of return was 0.84%.
53. The Treasury Management lending list is included at Annex 3 along with changes since the report to Cabinet on 20 April 2010.

Balances and Reserves

54. As reported in the Provisional Outturn Report, general balances were £11.145m at 31 March 2010. As part of the 2010/11 budget £1.975m has been added to balances in 2010/11 with the intention of bringing the total back to the risk assessed level of £12.5m. Balances are currently £13.120m.

Debt Write Offs

55. The Cabinet resolved at its meeting on 18 May 2010 to write off a planning obligation (Section 106 agreement) debt of £74,667.09 as the Council has been unable to secure payment of the outstanding monies.
56. There were 16 general write offs to the end of April 2010 totalling £4,883. Of these the largest was £1739. In addition Client Finance wrote off 12 debts totalling £10,444.85.

Carry Forwards from 2007/08

57. As noted in the Provisional Outturn Report, which is a separate item on the agenda, £0.087m of the total held in the Carry Forward Reserve relates to amounts held from 2007/08. Since these are not required, it is proposed that this amount should be transferred to the Efficiency Savings Reserve.
58. £0.020m remains in the reserve and was originally intended to fund the Creative Learning Conference in Social & Community Services. The Directorate is now requesting that this amount is released from reserves and added to their budget to fund dedicated staff capacity to coordinate the county's response to the opportunities created by the London Olympics and Paralympics.

Part 2: Capital Programme

59. The table below sets out the 2010/11 capital programme agreed by Council on 9 February 2010.

Directorate	Original 2010/11 Budget (Feb 2010)
	£m
Children Young People & Families	66.4
Social & Community Services	14.0
Environment & Economy: Transport	25.9
Environment & Economy: Other	8.8
Community Safety	1.3
Corporate Core	1.0
Subtotal Directorate Programmes	117.4
Devolved Formula Capital	9.5
Grant Funded Schemes devolved to schools	2.5
Earmarked Reserve Allocations	0.8
Total Capital Programme	130.2

60. The next formal programme update will be considered by Cabinet on 20 July 2010 and will include an update on the latest expenditure and funding profiles taking account of the 2009/10 year end position and other changes in April and May 2010. At this stage there are no changes to the programme agreed by Council on 9 February 2010.

Part 3: Impact of £6.2Bn National Savings Target

61. On 24 May 2010, the Government announced details of their plans to save £6.2Bn in 2010/11. Of this figure, £1.165Bn is to be found by Local Government. Key elements are that:
- There will be no reduction in Revenue Support Grant for 2010/11 so the budget requirement will not change;
 - Funding for Schools, 16-19 participation and Sure Start funding will be protected;
 - Ring fencing will be removed from £1.7Bn of other grant increasing flexibility locally; and
 - The savings of £1.165Bn will be found from reductions in individual grants to Local Authorities.
62. Notification has not yet been received on which specific grants are to be removed or reduced in 2010/11. However, the total is spread across four government departments as follows:
- £537m Department for Communities & Local Government (CLG)
 - £311m Department for Education
 - £309m Department for Transport
 - £8m Department of Environment, Food and Rural Affairs (DEFRA)
63. The effects of the reductions will vary, depending on whether the grants are for capital or revenue; whether work has been contractually committed and whether they support core activities. When details of which grants are affected are known, consideration will need to be given to whether the services they fund should be reduced, or whether other areas can offer any reductions.
64. Changes resulting from reductions in revenue grants will be reflected as virements which will change both income and expenditure. Since these are likely to require changes in policy they will need to be agreed by Cabinet and subsequently by Council. In addition the council will be reviewing and prioritising building and maintenance schemes in the coming months.
65. Further information had been received at the time of submitting this report, and an addenda will be issued prior to the meeting.

RECOMMENDATIONS

66. **The Cabinet is RECOMMENDED to:**
- (a) **note the report;**
 - (b) **approve the virement requests as set out in Annex 1a;**

- (c) **approve the transfer of £0.087m from the Carry Forward Reserve to the Efficiency Savings Reserve and the release of £0.020m to Social & Community Services as set out in paragraphs 57 and 58;**
- (d) **approve the transfer of £1.4m Council funding not required for Personal Care at Home to the Efficiencies Reserve as set out in paragraph 15.**

SUE SCANE

Assistant Chief Executive & Chief Finance Officer

Background papers: Directorate reports

Contact Officer: Kathy Wilcox, Principal Financial Manager,
Tel: 01865 323981

June 2010

CABINET IS RECOMMENDED TO APPROVE THE VIREMENTS AS DETAILED BELOW:

Report Paragraph Ref	Cabinet Date	Budget Book Ref	Service Area	Permanent/Temporary (P/T)	Council Approval Required (✓)	Details	Expenditure		Income	
							From / Decrease (-) £000	To / Increase (+) £000	From / Decrease (+) £000	To / Increase (-) £000
			VIREMENTS RECOMMENDED THIS REPORT							
			Intradirectorate Virements							
			Children, Young People & Families							
	Jun-10	CYPF1-42	Youth Offending Service	T		Pay protection for 2010/11	-3	3		
	Jun-10	CYPF4-9	Safeguarding							
	Jun-10	CYPF1-42	Youth Offending Service	P		YOS training budgets to be transferred to the IYSS Service	-6	6		
	Jun-10	CYPF1-41	Youth Support Service	P		Support budget to meet training needs for whole service				
	Jun-10	CYPF4-2	Performance	P		FIS income streams to be updated following confirmed				
	Jun-10	CYPF1-42	Youth Offending Service	T		FIP funding to be increased to include all (non gov't grant)	-123	11		-11
	Jun-10	CYPF4-3	Commissioning, Performance & Quality Assurance	P		Purchase Order Specialist Post		21		123
	Jun-10	CYPF1-1	Operations	P			-21			
	Jun-10	CYPF1-34	Centrally Managed Services	P		Outreach Work	-50	50		
	Jun-10	CYPF1-33	Alternative Education							
	Jun-10	CYPF1-1	Operations	T		Locality Co-ordination	-40	40		
	Jun-10	CYPF2-6	Locality Working							
	Jun-10	CYPF4-6B	Home to School Transport	T		Part funding for 2 post (that should have been funded by Developer costs).	-73	73		
	Jun-10	CYPF4-6B	Property & Assets	T						
	Jun-10	CYPF2-34	Children's Centres and Childcare	T		Create I&E Budget for Children's centres		762		-762
	Jun-10	CYPF2-34	Development Area Teams	T		Create I&E Budget for Children's centres				
	Jun-10	CYPF2-24	Children Looked After	P		Move budget to re-align service with expenditure activity	-982			
	Jun-10	CYPF2-25	Agency Residential Placements	P		Move budget to re-align service with expenditure activity		665		
	Jun-10	CYPF2-25	Agency Residential Placements	P		Move budget to re-align service with expenditure activity		317		
	Jun-10	CYPF2-23	Family Placements	P		Reallocate expenditure budget to new cost centre in line with service activity	-42			
	Jun-10	CYPF2-23	Family Placements	P		Reallocate expenditure budget to new cost centre in line with service activity	-85			
	Jun-10	CYPF2-22	Residential	P		Reallocate expenditure budget to new cost centre in line with service activity		128		
	Jun-10	CYPF2-24	Assessment	P		Reallocate expenditure budget to new cost centre in line with service activity	-100			
	Jun-10	CYPF2-53	Assessment	P		Reallocate additional 10/11 Placements budget in line with expenditure activity		25		
	Jun-10	CYPF2-53	Assessment	P		Reallocate additional 10/11 Placements budget in line with expenditure activity		20		
	Jun-10	CYPF2-53	Assessment	P		Reallocate additional 10/11 Placements budget in line with expenditure activity		7		
	Jun-10	CYPF2-53	Assessment	P		Reallocate additional 10/11 Placements budget in line with expenditure activity		48		

CABINET IS RECOMMENDED TO APPROVE THE VIREMENTS AS DETAILED BELOW:

Report Paragraph Ref	Cabinet Date	Budget Book Ref	Service Area	Permanent/ Temporary (P/T)	Council Approval Required (✓)	Details	Expenditure		Income	
							From / Decrease (-) £000	To / Increase (+) £000	From / Decrease (+) £000	To / Increase (-) £000
	Jun-10	CYPF2-2	Social Care	P		Remove grant Income & Expenditure, no longer forthcoming	-179		179	
	Jun-10	CYPF2-2	Social Care	P		Remove grant Income & Expenditure, no longer forthcoming	-30			
	Jun-10	CYPF2-2	Social Care	P		Remove grant Income & Expenditure, no longer forthcoming			30	
	Jun-10	CYPF4-2	Social Care	P		Remove grant Income & Expenditure, no longer forthcoming	-15	15		
	Jun-10	CYPF2-3	Family Information Service	T		Funding for Ten to Two Project				
	Jun-10	CYPF4-2	Early Learning & Childcare	T		Funding for Ten to Two Project	-15	15		
	Jun-10	CYPF2-3	Family Information Service	T		Funding for Ten to Two Project	-15			
	Jun-10	CYPF2-3	Early Learning & Childcare	P		Funding for Ten to Two Project	-88	44	88	-44
	Jun-10	CYPF4-3	Performance	P		Funding for Ten to Two Project		44		-44
	Jun-10	CYPF4-6	School Organisation	P		Funding for Ten to Two Project		44		-44
	Jun-10	CYPF1-42	Youth Offending Team	P		Summer Arts Project (funded by Unitas)		11		-11
	Jun-10	SC1_1	Social and Community Services Library Service	P		Childrens Centre Mobile budget adjustment.		65		-65
	Jun-10	SC1_2	Heritage & Arts Service	P		Budget tidy up as Coach house project has now closed.	-82			82
	Jun-10	SC1_3	Cultural & Community Development	P		Budget re-allocation for Cogges.	-8			
	Jun-10	SC1_2	Heritage & Arts Service	P		Budget re-allocation for Cogges.		8		
	Jun-10	SC1_2	Heritage & Arts Service	P		Budget adjustment re Cogges tidy up.	-134		134	
	Jun-10	SC1_2	Heritage & Arts Service	P		Victoria County History budget adjustment re additional income.		5		-5
	Jun-10	SC1_5	Music Service	P		Budget tidy adjustment to Standards Funding	-1		1	
	Jun-10	SC2_4a	Commissioning & Contracts	P		Re-allocation of budget to create an Assistant Service Manager and an Administrator Posts.		69		-69
	Jun-10	SC2_4b	Care Management & Social Work	P		Re-allocation of budget to fund Care Service Administrators.		12		-12
	Jun-10	SC2_4b	Care Management & Social Work	P		Re-allocation of budget to cover unqualified Care Management Staffing tasks.		9		-9

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							From / Decrease (-) £000	To / Increase (+) £000	From / Decrease (+) £000	To / Increase (-) £000
	Jun-10	SC2_4a	Commissioning & Contracts	P		Administration support budget re-allocation into the Care	-6	6	6	-6
	Jun-10	SC2_4b	Care Management & Social Work	P		Administration support budget re-allocation into the Care				
	Jun-10	SC2_11	One Off Funded Projects	P		Creation of a separate Alert Service budget book line with contributions from Supporting People and Telecare.	-500			
	Jun-10	SC4_5	Supporting People	P		Creation of a separate Alert Service budget book line with contributions from Supporting People and Telecare.	-2,010			
	Jun-10	SC2_2m	Alert Service	P		Creation of a separate Alert Service budget book line with contributions from Supporting People and Telecare.		2,510		
	Jun-10	SC2_1e	Adult Placement	P		Re-structuring of Internal Services to achieve efficiency plan.	-25			
	Jun-10	SC2_4c	ILS Support Costs	P		Re-structuring of Internal Services to achieve efficiency plan.		25		
	Jun-10	SC2_4f	OCC Contribution to LD Pool	P		Re-structuring of Internal Services to achieve efficiency plan.	-25		25	
	Jun-10	SC2_4e	LD Internal Day Services	P		Learning Disabilities and Older People accommodation swap for the provision of the Day Services			8	
	Jun-10	SC2_4e	LD Internal Day Services	P		Learning Disabilities and Older People accommodation swap for the provision of the Day Services	-33			
	Jun-10	SC2_4e	LD Internal Day Services	P		Learning Disabilities and Older People accommodation swap for the provision of the Day Services			25	
	Jun-10	OP Pool	Older People's Pooled Budget	P		Learning Disabilities and Older People accommodation swap for the provision of the Day Services				-8
	Jun-10	OP Pool	Older People's Pooled Budget	P		Learning Disabilities and Older People accommodation swap for the provision of the Day Services		33		
	Jun-10	OP Pool	Older People's Pooled Budget	P		Learning Disabilities and Older People accommodation swap for the provision of the Day Services				-25
	Jun-10	SC2_4f	OCC Contribution to LD Pool	P		Learning Disabilities and Older People accommodation swap for the provision of the Day Services	-25		25	
	Jun-10	SC2_2a	OCC Contribution to OP Pool	P		Learning Disabilities and Older People accommodation swap for the provision of the Day Services				
	Jun-10	SC4_1c	Facilities Management	P		Staffing re-structure following Facilities Management transfer	-43		43	
	Jun-10	SC4_2a	Strategy	P		Staffing re-structure following Facilities Management transfer to E&E.				
	Jun-10	SC2_11	One Off Funding Projects	P		Equalities and Diversity Manager post budget transfer.	-46			
	Jun-10	SC4_3	Directorate Leadership Team	P		Equalities and Diversity Manager post budget transfer.		46		
	Jun-10	SC4_2a	Strategy	P		Risk Manager post budget transfer.	-60			
	Jun-10	SC4_1c	Facilities Management	P		Risk Manager post budget transfer.		60		
	Jun-10	SC4_3	Directorate Leadership Team	P		Information Standards officer post budget transfer.	-51			
	Jun-10	SC4_1c	Facilities Management	P		Information Standards officer post budget transfer.		51		

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							From / Decrease (-) £000	To / Increase (+) £000	From / Decrease (+) £000	To / Increase (-) £000
	Jun-10	SC4_1c	Facilities Management	P		Transfer of Administrative Support staff budget to Care Management.	-373			
	Jun-10	SC2_2b	Care Management	P		Transfer of Administrative Support staff budget to Care		373		
	Jun-10	EE3.1.1	Environment and Economy Property - Corporate Property	P		E&E FM Budgets transferred to new FM cost centres within E&E	-413	1,407		
	Jun-10	EE3.1.3	Property - Strategic Asset Management	P		E&E FM Budgets transferred to new FM cost centres within E&E				
	Jun-10	EE3.1.2	Property - Operational Asset Management	P		E&E FM Budgets transferred to new FM cost centres within E&E	-739			
	Jun-10	EE4	Business Support	P		E&E FM Budgets transferred to new FM cost centres within E&E	-255			
	Jun-10	CS6.1.3	Community Safety & Shared Services Shared Services - FMA	P		Expenditure and Income budgets for contributions for additional management accounting resources from FWT/QCS.		26		-26
	Jun-10	CS6.1.3	Shared Services - FMA	P		Expenditure and Quest income budgets for the School Finance team		224		-224
	Jun-10	CS6.1.3	Shared Services - FMA	P		Transfer of budget from the Shared Services Operational Budgets to Central Budget for resourcing continuous improvement	-32			
	Jun-10	CS6.1.2	Shared Services - Financial Services	P			-16			
	Jun-10	CS6.1.4	Shared Services - HR	P			-36			
	Jun-10	CS6.1.1	Shared Services - Central Team	P				84		
	Jun-10	CS5	Trading Standards	P		Adjust Tr Stds budget to match predicted costs/targets (non pay)	-28			
	Jun-10	CS5	Trading Standards	P		Adjust Tr Stds budget to match predicted costs/targets (pay)		40		
	Jun-10	CS5	Trading Standards	P		Adjust Tr Stds budget to match predicted costs/targets (income)				-12
	Jun-10	CS4	Gypsy & Traveller Services	P		Adjust G&TS budget to match predicted costs/targets (pay)	-4			
	Jun-10	CS4	Gypsy & Traveller Services	P		Adjust G&TS budget to match predicted costs/targets (non pay)		15		
	Jun-10	CS4	Gypsy & Traveller Services	P		Adjust G&TS budget to match predicted costs/targets (income)				-11
	Jun-10	CS1.4	F&RS - Business Management	P		F14000 staffing budget insufficient (non pay F10000)	-12			
	Jun-10	CS1.4	F&RS - Business Management	P		F14000 staffing budget insufficient (pay F14000)		12		
	Jun-10	CS1.2	F&RS - Service Delivery Management	P		Adjust CFS budget to match costs (non pay)	-38			
	Jun-10	CS1.2	F&RS - Service Delivery Management	P		Adjust CFS budget to match costs (pay)		38		
	Jun-10	CS1.1	F&RS - Wholesale Operational Staff	P		Adjust RMB budget (non pay)	-4			
	Jun-10	CS1.1	F&RS - Wholesale Operational Staff	P		Adjust RMB budget (pay)		4		
	Jun-10	CC3.3	Organisational Development	T		Transfer of Lead Oxfordshire balance from Change Fund	-380	380		

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							From / Decrease (-) £000	To / Increase (+) £000	From / Decrease (+) £000	To / Increase (-) £000
11	Jun-10	CC1.1	Corporate Core Business Support	P		Contribution to 0.5FTE in Web Services Team (ICT)	-1			
	Jun-10	CC3.1	Human Resources - Strategic HR	P			-4			
	Jun-10	CC4.1	Finance & Procurement - Service Management	P			-1			
	Jun-10	CC5.1	Legal & Democratic Services - Legal Services	P			-1			
	Jun-10	CC6.1	Partnership Working	P			-1			
	Jun-10	CC8.1	Communications & Marketing	P			-2			
	Jun-10	CC3.4	Customer Services	P			-1	11		
	Jun-10	CC2.1.13	ICT - Web Services	P						
	Jun-10	CC2.7	ICT - Strategy Investment Fund	P			-2,000	2,000		
	Jun-10	CC3.4	Human Resources - Customer Services	P						
	Jun-10	CC1.1	Business Support	P			-47	47		
Jun-10	CC7.1	Policy - Policy & Performance	P							
						Total Intradirectorate Virements Recommended	-9,290	9,933	701	-1,344
			Interdirectorate Virements							
			Children, Young People & Families							
	Jun-10	CYPF46	Home to School Transport	P		Final budget settlement for the school appeals process - To CC	-25			
	Jun-10	CYPF46	Home to School Transport	P		Fleet Drivers to ITU - To E&E	-22			
	Jun-10	CYPF4-5	Human Resources & Children's Workforce	P		Transfer to Recruitment & Retention - To CS & SS	-17			
	Jun-10	CYPF4-4	Business Improvement	P		Transfer of facilities management non-staffing budgets - To E&E	-386			
	Jun-10	CYPF4-4	Business Improvement	P		Transfer of facilities management staffing budgets - To E&E	-91			
	Jun-10	CYPF3-1	RAS Management & Central Costs	P		Transfer of facilities management staffing budgets - To E&E	-99			
	Jun-10	CYPF4-5	Human Resources & Children's Workforce	T		Allocation of L&D budget		56		
	Jun-10	CYPF4-9	Safeguarding	P		Budget for 6.24fte admin posts to transfer from SCS		143		
	Jun-10	SC4_1A	Social and Community Services Recharges	P		Learning and Development transferred into SCS as per Corporate L&D plan.	-640	199	0	0
	Jun-10	SC4_1A	Recharges	P		Budget for Print Unit recharges from Corporate Core		124		
	Jun-10	SC4_1C	Administration	T		Transfer FM Budgets to E&E	-63	5		
	Jun-10	SC4_1C	Administration	P	✓	Transfer FM Budgets to E&E	-1,058			
	Jun-10	SC4_1C	Administration	P		Budget for 6.24fte admin posts to transfer to CYPF	-143			
							-1,264	129	0	0

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							From / Decrease (-) £000	To / Increase (+) £000	From / Decrease (+) £000	To / Increase (-) £000
			Environment and Economy							
	Jun-10	EE1	Transport	T		Transfer of Learning & Development 10/11 Budget from CC CS&SS		74		
	Jun-10	EE2	Sustainable Development	T		Transfer of Learning & Development 10/11 Budget from CC CS&SS		22		
	Jun-10	EE3	Property Services	T		Transfer of Learning & Development 10/11 Budget from CC CS&SS		20		
	Jun-10	EE4	Business Improvement	T		Transfer of Learning & Development 10/11 Budget from CC CS&SS		2		
	Jun-10	EE1.4	Transport - Oxfordshire Highways	P		Transfer of Contact Centre Allocation to CC CS&SS	-142			
	Jun-10	EE4	Business Improvement	P		MA Support Budget Transfer to CC CS&SS	-42			
	Jun-10	EE1.2.1	Transport ITU	P		Fleet Drivers Pay Increase Contribution from CYP&F		22		
	Jun-10	EE4	Business Improvement	P		Transfer of salary from CC CS&SS		71		
	Jun-10	EE3.1.1	Environment and Economy	T		FM Budgets transferred from Directorates		63		
	Jul-10	EE3.1.1	Environment and Economy	P		FM Budgets transferred from Directorates		1,634		
			Community Safety & Shared Services				-184	1,908	0	0
	Jun-10	CS6.1.3	Shared Services - FMA	P		Transfer of Capital Staff to Corporate Finance	-40			
	Jun-10	CS6.1.3	Shared Services - FMA	P		Transfer of budget from E&E for Additional Management Accounting Support		42		
	Jun-10	CS6.1.3	Shared Services - FMA	P		Transfer of additional funding received from CYP&F for CIPFA trainee in CYPF Management Accounting Team to the CIPFA Trainee budget	-40			
	Jun-10	CS6.1.1	Shared Services - Management Team	P		Contribution to 0.5FTE in Web Services Team (ICT)	-6			
	Jun-10	CS6.1.3	Shared Services - FMA	P		Contribution from Corporate Core for Additional Management Accounting Resources		5		
	Jun-10	CS6.1.4	Shared Services -HR	P		Transfer of recruitment function from services in CYPF		17		
	Jun-10	CS6.1.4	Shared Services - HR	T		Transfer of 10/11 directorate L&D allocations	-495			
							-581	64	0	0

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Report Paragraph Ref	Cabinet Date	Budget Book Ref	Service Area	Permanent/Temporary (P/T)	Council Approval Required (✓)	Details	Expenditure		Income	
							From / Decrease (-) £000	To / Increase (+) £000	From / Decrease (+) £000	To / Increase (-) £000
	Jun-10	CC4.2	Corporate Core Finance & Procurement - Corporate Finance	P		Transfer of Capital team to Corporate Finance from Shared Services		40		
	Jun-10	CC4.2	Finance & Procurement - Corporate Finance	P		Transfer of additional funding received from CYP&F for CIPFA trainee in CYPF Management Accounting Team to the CIPFA Trainee budget		40		
	Jun-10	CC2.1.13	ICT - Web Services	P		Contribution to 0.5FTE in Web Services Team (ICT) from Shared Services		6		
	Jun-10	CC2.1.14	ICT - Service Management	P		Contribution to Additional Management Accounting Resources in Shared Services FMA	-1			
	Jun-10	CC4.1	Finance & Procurement - Service Management	P			-1			
	Jun-10	CC3.1	Human Resources - Strategic HR	P			-1			
	Jun-10	CC7.1	Policy - Corporate Performance	P			-1			
	Jun-10	CC5.1	Legal & Democratic Services - Legal Services	P			-1			
	Jun-10	CC4.1	Finance & Procurement - Service Management	P		Transfer of Capital Programme Manager to E&E	-71			
	Jun-10	CC8.2	Communications - Print Unit			Transfer of Print Unit Property Recharge Budget to S&CS	-5			
	Jun-10	CC3.4	Human Resources - Customer Services	P		Transfer of Highways Team to Customer Services from E&E		142		
	Jun-10	CC1.1	Business Support	T		Corporate Core directorate learning & development allocation		197		
	Jun-10	CC5.2	Democratic Services			Final budget settlement for the school appeals process - To CC		25		
			Strategic Measures				-81	450	0	0
							0	0	0	0
						Total Interdirectorate Virements Recommended	-2,750	2,750	0	0
						TOTAL VIREMENTS RECOMMENDED THIS REPORT	-12,040	12,683	701	-1,344

VIREMENTS FOR CABINET TO NOTE THIS REPORT

Reprt Paragraph Ref	Cabinet Date	Budget Book Ref	Service Area	Permanent/ Temporary (P/T)	Details	Expenditure		Income	
						From / Decrease (-) £000	To / Increase (+) £000	From / Decrease (+) £000	To / Increase (-) £000
			<u>VIREMENTS TO NOTE THIS REPORT</u>						
			Intradirectorate Virements						
			Children, Young People & Families						
			Social and Community Services						
	Jun-10	SC1_5	Music Service	T	Federation of Music Services Instrument Grant		112		-112
	Jun-10	SC4_2a	Strategy	T	Taking Part Team consultation salaries funding from TASC.		20		-20
	Jun-10	SC2_4a	Commissioning and Contracts	T	Brokerage costs funding from TASC		80		-80
	Jun-10	SC2_4b	Care Management & Social Work	T	Preventative Services Salary costs funding from One Off Funding Projects.		30		-30
						0	242	0	-242
					Total Intradirectorate Virements	0	242	0	-242
			Interdirectorate Virements						
					Total Interdirectorate Virements	0	0	0	0
					TOTAL VIREMENTS TO NOTE THIS REPORT	0	242	0	-242

Virements required to be reported to Cabinet:

1. Temporary virements between £50,000 and £250,000.

NB: All virements **greater than £500,000 that constitute a change in policy** will be recommended by Cabinet for approval by Council. This includes the cumulative total of virements that have previously been reported and approved.

2010/11 Virements Noted by Cabinet on 20 April 2010

Reprt Paragraph Ref	Cabinet Date	Budget Book Ref	Service Area	Permanent/ Temporary (P/T)	Details	Expenditure		Income	
						From / Decrease (-) £000	To / Increase (+) £000	From / Decrease (+) £000	To / Increase (-) £000
			VIREMENTS TO NOTED BY CABINET ON 20TH APRIL						
			Intradirectorate Virements			0	0	0	0
			Interdirectorate Virements						
			Children, Young People & Families						
Apr-10		CYPF1-1	Management & Central Costs	P	Reduction to Green Book Pay Inflation	-8			
Apr-10		CYPF1-22	SEN Support Services (SENS)	P	Reduction to Green Book Pay Inflation	-9	1		
Apr-10		CYPF1-23	Services for Disabled Children	P	Reduction to Green Book Pay Inflation	-5			
Apr-10		CYPF1-32	Attendance & Welfare	P	Reduction to Green Book Pay Inflation	-6			
Apr-10		CYPF1-41	Youth Support Service	P	Reduction to Green Book Pay Inflation	-11			
Apr-10		CYPF1-42	Youth Offending Service	P	Reduction to Green Book Pay Inflation	-5			
Apr-10		CYPF2-1	Management & Central Costs	P	Reduction to Green Book Pay Inflation	-11			
Apr-10		CYPF2-22	Residential	P	Reduction to Green Book Pay Inflation	-8			
Apr-10		CYPF2-23	Family Placement	P	Reduction to Green Book Pay Inflation	-1			
Apr-10		CYPF2-24	Children Looked After	P	Reduction to Green Book Pay Inflation	-10			
Apr-10		CYPF2-51	Central Support Costs	P	Reduction to Green Book Pay Inflation	-9			
Apr-10		CYPF2-52	Family Support	P	Reduction to Green Book Pay Inflation	-2			
Apr-10		CYPF2-53	Assessment	P	Reduction to Green Book Pay Inflation	-1			
Apr-10		CYPF2-54	Child and Adolescent Mental Health	P	Reduction to Green Book Pay Inflation	-1			
Apr-10		CYPF2-6	Locality Working	P	Reduction to Green Book Pay Inflation	-1			
Apr-10		CYPF3-1	Management & Central Costs	P	Reduction to Green Book Pay Inflation	-1			
Apr-10		CYPF3-3	School Improvement	P	Reduction to Green Book Pay Inflation	-1			
Apr-10		CYPF3-32	Educational Achievement & Service Monitor	P	Reduction to Green Book Pay Inflation	-3			
Apr-10		CYPF3-34	Partnership Development & Extended Learning	P	Reduction to Green Book Pay Inflation	-1			
Apr-10		CYPF4-1	CPOA Management & Central Costs (incl recharges)	P	Reduction to Green Book Pay Inflation	-4			
Apr-10		CYPF4-2	Performance	P	Reduction to Green Book Pay Inflation	-2			
Apr-10		CYPF4-3	Commissioning	P	Reduction to Green Book Pay Inflation	-3			
Apr-10		CYPF4-4	Business Improvement	P	Reduction to Green Book Pay Inflation	-5			
Apr-10		CYPF4-5	Human Resources & Children's Workforce	P	Reduction to Green Book Pay Inflation	-3	1		
Apr-10		CYPF4-6	School Organisation & Planning	P	Increase to Teachers Pay Inflation	1			
Apr-10		CYPF4-9	Safeguarding & Quality Assurance	P	Increase to Teachers Pay Inflation	6			
Apr-10		CYPF5-1	Devolved Budgets	P	Increase to Teachers Pay Inflation	38			
Apr-10		CYPF1-32	Attendance & Welfare	P	Increase to Teachers Pay Inflation	13			
Apr-10		CYPF2-21	Educational Achievement (CLA)	P	Increase to Teachers Pay Inflation	6			
Apr-10		CYPF3-32	Educational Achievement & Service Monitor	P	Increase to Teachers Pay Inflation	0			
Apr-10		CYPF3-34	Partnership Development & Extended Learning	P	Increase to Teachers Pay Inflation	-1			
Apr-10		CYPF4-5H	Human Resources & Children's Workforce	P	Reduction to Chief Officers Green Book Pay Inflation				
Apr-10		CYPF3-1	Management & Central Costs	P	Reduction to Chief Officers Green Book Pay Inflation				
Apr-10		CYPF4-1	CPOA Management & Central Costs (incl recharges)	P	Reduction to Chief Officers Green Book Pay Inflation				

Reprt Paragraph Ref	Cabinet Date	Budget Book Ref	Service Area	Permanent/ Temporary (P/T)	Details	From / Decrease (-) £000	To / Increase (+) £000	From / Decrease (+) £000	To / Increase (-) £000
			Social and Community Services						
	Apr-10	SC1_1	Library Service	P	Reduction in pay inflation to 0%.	-30			
	Apr-10	SC1_2	Heritage & Arts Service	P	Reduction in pay inflation to 0%.	-9			
	Apr-10	SC1_3	Cultural & Community Development	P	Reduction in pay inflation to 0%.	-2			
	Apr-10	SC1_4	Adult Learning	P	Reduction in pay inflation to 0%.	-10	1		
	Apr-10	SC1_5	Music Service	P	Teachers Pay inflation additional 1.8%	-1	37		
	Apr-10	SC1_6	Registration Service	P	Reduction in pay inflation to 0%.	-6			
	Apr-10	SC2_1A	Sensory Impairment	P	Reduction in pay inflation to 0%.	-2			
	Apr-10	SC2_1B	Occupational Therapy & Equipment	P	Reduction in pay inflation to 0%.	-10			
	Apr-10	SC2_1D	Employment Service	P	Reduction in pay inflation to 0%.	-4			
	Apr-10	SC2_1E	Adult Placement Service	P	Reduction in pay inflation to 0%.	-3			
	Apr-10	SC2_1J	Emergency Duty Team	P	Reduction in pay inflation to 0%.	-3			
	Apr-10	SC2_2A	Contribution to OP Pooled Budget	P	Reduction in pay inflation to 0%.	-69			
	Apr-10	SC2_2B	Care Management Teams	P	Reduction in pay inflation to 0%.	-21			
	Apr-10	SC2_2J	PD Care Management Teams	P	Reduction in pay inflation to 0%.	-4			
	Apr-10	SC2_3A	Contribution to MH Pool	P	Reduction in pay inflation to 0%.	-1			
	Apr-10	SC2_4A	Commissioning & Contracts	P	Reduction in pay inflation to 0%.	-4			4
	Apr-10	SC2_4B	Care Management & Social Work	P	Reduction in pay inflation to 0%.	-5			5
	Apr-10	SC2_4C	Independent Living Service Support Costs	P	Reduction in pay inflation to 0%.	-1			1
	Apr-10	SC2_4D	Supported Living Internal	P	Reduction in pay inflation to 0%.	-14			14
	Apr-10	SC2_4E	Day Services Internal	P	Reduction in pay inflation to 0%.	-20			20
	Apr-10	SC2_4F	OCC Contribution to the Learning Disabilities	P	Reduction in pay inflation to 0%.	-44			
	Apr-10	SC4_1A	Recharges	P	Reduction in pay inflation to 0%.	-1			
	Apr-10	SC4_1B	Information Systems & Processes	P	Reduction in pay inflation to 0%.	-4			
	Apr-10	SC4_1C	Facilities Management	P	Reduction in pay inflation to 0%.	-15			
	Apr-10	SC4_2A	Strategy	P	Reduction in pay inflation to 0%.	-2			
	Apr-10	SC4_2C	Contracts	P	Reduction in pay inflation to 0%.	-4			
	Apr-10	SC4_3	Directorate Leadership Team	P	Reduction in pay inflation to 0%.	0			
	Apr-10	Mem A/c	OCC Contribution to the Learning Disabilities Pool	P	Reduction in pay inflation to 0%.	-44		44	
	Apr-10	Mem A/c	Contribution to OP Pooled Budget	P	Reduction in pay inflation to 0%.	-69		69	

Reprt Paragraph Ref	Cabinet Date	Budget Book Ref	Service Area	Permanent/ Temporary (P/T)	Details	From / Decrease (-) £000	To / Increase (+) £000	From / Decrease (+) £000	To / Increase (-) £000
			Environment and Economy						
	Apr-10	EE1.2	Policy & Strategy	P	Reduction in Green Book Pay Inflation	-29			
	Apr-10	EE1.3	Network Management	P	Reduction in Green Book Pay Inflation	-7			
	Apr-10	EE1.4	Oxfordshire Highways	P	Reduction in Green Book Pay Inflation	-24			
	Apr-10	EE2.1	Sustainable Development Management	P	Reduction in Green Book Pay Inflation	-1			
	Apr-10	EE2.2	Planning Implementation	P	Reduction in Green Book Pay Inflation	-6			
	Apr-10	EE2.3	Strategic Policy & Economic Development	P	Reduction in Green Book Pay Inflation	-3			
	Apr-10	EE2.4	Waste Management	P	Reduction in Green Book Pay Inflation	-3			
	Apr-10	EE2.5	Countryside	P	Reduction in Green Book Pay Inflation	-4			
	Apr-10	EE3.1	1 Corporate Property	P	Reduction in Green Book Pay Inflation	-1			
	Apr-10	EE3.1	2 Operational Asset Management	P	Reduction in Green Book Pay Inflation	-4			
	Apr-10	EE3.1	3 Strategic Asset Management	P	Reduction in Green Book Pay Inflation	-2			
	Apr-10	EE3.1	4 Project Delivery	P	Reduction in Green Book Pay Inflation	-3			
	Apr-10	EE3.1	5 Sustainability & Procurement	P	Reduction in Green Book Pay Inflation	-1			
	Apr-10	EE3.1	6 Information & Support	P	Reduction in Green Book Pay Inflation	-1			
	Apr-10	EE4.1	Business Improvement	P	Reduction in Green Book Pay Inflation	-3			
	Apr-10	EE4.1	Business Improvement	P	Reduction in Green Book Pay Inflation	-1			
			Community Safety & Shared Services						
	Apr-10	CS1.1	F&RS - Wholetime Operational Staff		Reduce Chief Officers Pay Inflation	-2			
	Apr-10	CS1.1	F&RS - Wholetime Operational Staff		Reduce Green Book Pay Inflation	-1			
	Apr-10	CS1.2	F&RS - Service Delivery Management		Reduce Green Book Pay Inflation	-1			
	Apr-10	CS1.3	F&RS - Special Projects		Reduce Green Book Pay Inflation	-1			
	Apr-10	CS1.4	F&RS - Business Management		Reduce Green Book Pay Inflation	-7			
	Apr-10	CS1.5	F&RS - Service Support Management		Reduce Green Book Pay Inflation	-1			
	Apr-10	CS2	Emergency Planning		Reduce Green Book Pay Inflation	-1			
	Apr-10	CS3	Safer & Stronger Communities		Reduce Green Book Pay Inflation	-1			
	Apr-10	CS4	Gypsy & Traveller Services		Reduce Green Book Pay Inflation	-1			
	Apr-10	CS5	Trading Standards		Reduce Green Book Pay Inflation	-10			
	Apr-10	CS6.1.1	Shared Services - Central Team		Reduce Green Book Pay Inflation	-3			
	Apr-10	CS6.1.2	Shared Services - Financial Services		Reduce Green Book Pay Inflation	-9			
	Apr-10	CS6.1.3	Shared Services - FMA		Reduce Green Book Pay Inflation	-16			
	Apr-10	CS6.1.4	Shared Services - HR		Reduce Green Book Pay Inflation	-22			

Reprt Paragraph Ref	Cabinet Date	Budget Book Ref	Service Area	Permanent/ Temporary (P/T)	Details	From / Decrease (-) £000	To / Increase (+) £000	From / Decrease (+) £000	To / Increase (-) £000
			Corporate Core						
	Apr-10	CC1.1	Business Support	P	Reduction to Green Book Pay Inflation	-2			
	Apr-10	CC2.1.1	ICT - Deployment	P	Reduction to Green Book Pay Inflation	-3			
	Apr-10	CC2.1.2	ICT - Project Management	P	Reduction to Green Book Pay Inflation	-4			
	Apr-10	CC2.1.3	ICT - Service Centre	P	Reduction to Green Book Pay Inflation	-4			
	Apr-10	CC2.1.4	ICT - Servers	P	Reduction to Green Book Pay Inflation	-3			
	Apr-10	CC2.1.5	ICT - Network	P	Reduction to Green Book Pay Inflation	-2			
	Apr-10	CC2.1.6	ICT - Desktop	P	Reduction to Green Book Pay Inflation	-3			
	Apr-10	CC2.1.7	ICT - Technical Admin	P	Reduction to Green Book Pay Inflation	-3			
	Apr-10	CC2.1.10	ICT- Compliance	P	Reduction to Green Book Pay Inflation	-2			
	Apr-10	CC2.1.11	ICT - Liaison Managers	P	Reduction to Green Book Pay Inflation	-2			
	Apr-10	CC2.1.12	ICT - Application Support	P	Reduction to Green Book Pay Inflation	-2			
	Apr-10	CC2.1.13	ICT- Web Services	P	Reduction to Green Book Pay Inflation	-1			
	Apr-10	CC2.1.14	ICT - Service Management	P	Reduction to Green Book Pay Inflation	-2			
	Apr-10	CC2.2	ICT - Schools Support	P	Reduction to Green Book Pay Inflation	-2			
	Apr-10	CC2.4	ICT - SAP	P	Reduction to Green Book Pay Inflation	-2			
	Apr-10	CC2.5	ICT - CIMU	P	Reduction to Green Book Pay Inflation	-1			
	Apr-10	CC3.1	Human Resources - Strategic HR	P	Reduction to Green Book Pay Inflation	-4			
	Apr-10	CC3.2	Human Resources - Unison	P	Reduction to Green Book Pay Inflation	-1			
	Apr-10	CC3.3	Human Resources - OD	P	Reduction to Green Book Pay Inflation	-3			
	Apr-10	CC3.4	Human Resources - Customer Services	P	Reduction to Green Book Pay Inflation	-1			
	Apr-10	CC4.1	Finance & Procurement - Service Management	P	Reduction to Green Book Pay Inflation	-1			
	Apr-10	CC4.2	Finance & Procurement - Corporate	P	Reduction to Green Book Pay Inflation	-4			
	Apr-10	CC4.3	Finance & Procurement - County	P	Reduction to Green Book Pay Inflation	-3			
	Apr-10	CC4.4	Procurement	P	Reduction to Green Book Pay Inflation	-3			
	Apr-10	CC5.1	Finance & Procurement - Internal Audit	P	Reduction to Green Book Pay Inflation	-6			
	Apr-10	CC5.2	Legal & Democratic - Legal Services	P	Reduction to Green Book Pay Inflation	-3			
	Apr-10	CC5.6	Legal & Democratic - Democratic Services	P	Reduction to Green Book Pay Inflation	-1			
	Apr-10	CC6.1	Partnerships - Partnerships Working	P	Reduction to Green Book Pay Inflation	-2			
	Apr-10	CC7.1	Policy - Policy & Performance	P	Reduction to Green Book Pay Inflation	-3			
	Apr-10	CC7.3	Policy - Consultation & Involvement	P	Reduction to Green Book Pay Inflation	-1			
	Apr-10	CC7.4	Policy - Research & Intelligence	P	Reduction to Green Book Pay Inflation	-1			
	Apr-10	CC8.1	Communications & Marketing	P	Reduction to Green Book Pay Inflation	-3			
	Apr-10	CC1.1	Business Support	P	Reduction to Chief Officers Pay Inflation	-3			
	Apr-10	CC7.1	Policy - Policy & Performance	P	Reduction to Chief Officers Pay Inflation	-1			
	Apr-10	SM	Strategic Measures Strategic Measures	P	Pay inflation adjustments to Green Book & Teachers Pay	762	-94	-157	0
			Total Interdirectorate Virements			0	0	0	0
			TOTAL VIREMENTS TO NOTE THIS REPORT			0	0	0	0

Virements required to be reported to Cabinet:

1. Temporary virements between £50,000 and £250,000.

NB: All virements greater than £500,000 that constitute a change in policy will be recommended by Cabinet for approval by Council. This includes the cumulative total of virements that have previously been

Supplementary Estimates

Report Paragraph Reference	Cabinet Date	Budget Book Ref	Service Area	Details	£000	Repayable/ Non-repayable
			SUPPLEMENTARY ESTIMATES REQUESTED THIS REPORT			
TOTAL SUPPLEMENTARY ESTIMATES THIS REPORT					0	

**April Financial Monitoring Report
CABINET - 22 June 2010
Specific Grants Monitoring 2010/11**

Annex 2a

Ringfenced (#)	Notification (#)	Directorate	2010/11 Grant Budget Book Original Estimate	Previously Reported changes to existing grants	New Grants/ Changes to existing grants this MMR	Total Grant Funding Available in 2010/11	Total variation to 2010/11 Grant Budget Book	Grant Funded Expenditure to Date	Balance Remaining	% Remaining	Forecast Expenditure to 31 March 2011	Balance that can be carried forward (subject to approval from grant body)
			£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
		Children, Young People & Families										
R	F	Dedicated Schools Grant (DSG)	333,376			333,376	0	27,781	305,595	92%		-333,376
R	P	Standards Fund	27,122			27,122	0	2,260	24,862	92%		-27,122
R	F	School Standards	18,196			18,196	0	1,516	16,680	92%		-18,196
R	F C	Sure Start General	14,845			14,845	0	1,237	13,608	92%		-14,845
OS	P	Learning & Skills Council	41,327			41,327	0	3,444	37,883	92%		-41,327
R	C	Asylum Seekers	1,604			1,604	0	99	1,505	94%		-1,604
R	F	Parenting Strategy Support Grant	238			238	0		238	100%		-238
R	F	Contact Point	140			140	0		140	100%		-140
R	F	Youth Opportunity Fund	347			347	0		347	100%		-347
R	F	Youth Justice Board	1,129			1,129	0		1,129	100%		-1,129
R	FC	DCSF - Family Intervention project	246		80	326	80	12	326	100%		-326
R	P C	Leaving Care, Unaccompanied Asylum Seekers	429			429	0		417	97%		-429
R	F	Diploma Development Fund	15			15	0		15	100%		-15
R	F	Oxfordshire PCT Partnership Funding (Youth)	15			15	0		15	100%		-15
R	F	Thames Valley Police (Youth)	145			145	0		145	100%		-145
R	F	Huntercombe Young Offenders Institution (Youth)	150			150	0		150	100%		-150
R	F	Probation (Youth)	99			99	0		99	100%		-99
R	F	Aiming High for Disabled Children	2,037		25	2,062	25		2,062	100%		-2,062
R	F	Two Year Old Offer Early Learning and Childcare	329			329	0		329	100%		-329
R	F	Disabled Childrens Access to Childcare - Pathfinder	902			902	0		902	100%		-902
		Oxfordshire Education Business Partnership	322			322	0		322	100%		-322
		School Workforce	92			92	0		92	100%		-92
		School Support Staff Training and Qualifications	105			105	0		105	100%		-105
R	F	Play Pathfinder	192			192	0		192	100%		-192
OS	P	Young People's Learning Agency	28,796			28,796	0		28,796	100%		-28,796
		DCSF - Housing Challenge Funds	0		175	175	175		175	100%		-175
		Social & Community Services										
R	F C	AIDS & HIV Training	187			187	0	1	186	99%	284	97
OS	P	Learning & Skills Council - Adult Education	3,652			3,652	0	304	3,348	92%	3,652	0
R	P	Standards Fund (Adult Learning)	66			66	0	6	60	91%	0	-66
R	F	Social Care Reform Grant	2,295			2,295	0	158	2,137	93%	3,443	1,148
OS	C	General Registrars Office	-5			0	5	0	0	0%	0	0
R	P	Standards Fund (Music Service)	673		5	673	0	56	617	92%	673	0

**April Financial Monitoring Report
CABINET - 22 June 2010
Specific Grants Monitoring 2010/11**

Annex 2a

Notification (#)	Directorate	2010/11 Grant Budget Book Original Estimate	Previously Reported changes to existing grants	New Grants/ Changes to existing grants this MMR	Total Grant Funding Available in 2010/11	Total variation to 2010/11 Grant Income per Budget Book	Grant Funded Expenditure to Date	Balance Remaining	% Remaining	Forecast Expenditure to 31 March 2011	Balance that can be carried forward (subject to approval from grant body)
Ringfenced (#)		£'000	£'000	£'000		£'000	£'000	£'000	£'000	£'000	£'000
OS	Workstep	276			276	0	0	276	100%	276	0
R	LD Campus Closure	47			47	0	4	43	91%	47	0
U	Information Advice Guidance	12			12	0	0	12	100%	12	0
R	Adult Stroke Services	213			213	0	15	198	93%	287	74
R	Minor Repairs and Adaptions	185			185	0	0	185	100%	293	108
R	National Dementia Strategy	39			39	0	15	24	62%	55	16
R	Development of Performance Indicators	0			0	0	0	0	N/A	16	16
R	Supporting People	0			0	0	0	0	N/A	837	837
	Environment & Economy										
OS	Winter Maintenance	0		1,477	1,477	1,477	123	1,354	92%	1,477	0
P	Countryside Agency	235			235	0	20	215	92%	235	0
	Community Safety & Shared Services										
R	New Burdens Grant	116		24	140	24	9	131	93%	110	-30
	TOTAL SPECIFIC GRANTS	480,189	0	1,786	481,975	1,786	37,061	444,914	38	11,697	-470,278

(#) See overleaf for key

Note: The timing of when New Burdens Grant is spent is dependent on the progress of the Regional Fire Control project

Ringfenced

R

Ringfenced

U

Un-ringfenced

OS

Outside Aggregate External Finance therefore R/U not applicable. Assume conditions attached therefore ringfenced

Notification

P Provisional Notification Received

F

Final Notification Received

C

Claim Required

bv

**April Financial Monitoring Report
Changes to Specific Grants
CABINET - 22 June 2010**

Annex 2b

Cabinet Date	Ringfenced	Notification	Budget Book Ref	Service Area	Details	Expenditure		Income	
						From / Decrease (-) £000	To / Increase (+) £000	From / Decrease (+) £000	To / Increase (-) £000
Jun-10	R	F	CYPF1-42	Children, Young People & Families Youth Offending Team	Think Family grant increased following successful bids in relation to Women Offenders & Housing Challenge Fund		80		-80
Jun-10	R	F	CYPF1-42	Youth Offending Team	FIP funding increased following successful bids in relation to Housing Challenge Fund rounds 1 & 2		175		-175
Jun-10	U	F	CYPF1-23	Services for Disabled	Additional grant funding for Aiming High for Disabled Children - Short Break Services		25		-25
				Environment & Economy Winter Maintenance	Department for Transport Grant to be spent by 31 October 2010. Notified at the end of March 2010		1,477		-1,477
Jun-10	R	F	SC1_6	Social and Community Services Registration	Grant has now ceased.		5		-5
Jun-10			CS1.3	Community Safety & Shared Services Special Projects	New Burdens Grant - will be £140k		24		-24
					TOTAL CHANGES TO SPECIFIC GRANTS	0	1,786	0	-1,786

Ringfenced

R Ringfenced

U Un-ringfenced

OS Outside Aggregate External Finance therefore R/U not applicable. Assume conditions attached therefore ringfenced

Notification

P Provisional Notification Received

F Final Notification Received

C Claim Required

April Financial Monitoring Report
CABINET - 22 June 2010
 Area Based Grant Monitoring 2010/11

Annex 2c

Ringfenced	Notification	Directorate	Grant Income per Budget Book Original Estimate £'000	Previously Reported £'000	New Grants/ Changes to Existing Grants this MMR £'000	Current Grant Amount Revised Estimate £'000	Current Variation to Grant Income £'000	Grant Expenditure to Date £'000	Balance Remaining £'000	% Remaining	Forecast Expenditure to 31 March 2011 £'000
		Children, Young People & Families									
U	F	Child & Adolescent Mental Health Grant	778			778	0		778	100%	778
U	F	Carers Grant (Children)	481			481	0		481	100%	481
U	F	Children's Fund	869			869	0		869	100%	869
U	F	Connexions	4,658			4,658	0		4,658	100%	4,658
U	F	Positive Activities for Young People	397			397	0		397	100%	397
U	F	Young People Substance Mis-Use	187			187	0		187	100%	187
		Former Standards Fund:									
U	F	School Development Grant - LA element	1,835			1,835	0		1,835	100%	1,835
U	F	Extended Schools Start Up costs	655			655	0		655	100%	655
U	F	School Improvement Partners	289			289	0		289	100%	289
U	F	Education Health Partnerships	120			120	0		120	100%	120
U	F	Choice Advisers	37			37	0		37	100%	37
U	F	School Intervention	188			188	0		188	100%	188
U	F	Flexible 14-19 Partnership Funding	160			160	0		160	100%	160
U	F	Extended Rights to Free Travel	479			479	0		479	100%	479
U	F	Sustainable Travel	52			52	0		52	100%	52
U	F	Secondary National Strategy - Behaviour & Att	183			183	0		183	100%	183
U	F	Secondary National Strategy - Central Co-ordination	267			267	0		267	100%	267
U	F	Primary National Strategy - Central Co-ordination	320			320	0		320	100%	320
U	F	Teenage Pregnancy	160			160	0		160	100%	160
U	F	Care Matters White Paper	403			403	0		403	100%	403
U	F	Child Death Review Processes	58			58	0		58	100%	58
U	F	Child Trust Fund	7			7	0		7	100%	7
U	F	Designated Teacher Funding	44			44	0		44	100%	44
U	F	Learning & Skills Council - Special Purpose Grant	404			404	0		404	100%	404
U	F	January Guarantee - Connexions	0		64	64	64		64	100%	64

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Ringfenced	Notification	Directorate	Grant Income per Budget Book Original Estimate £'000	Previously Reported £'000	New Grants/ Changes to Existing Grants this MMR £'000	Current Grant Amount Revised Estimate £'000	Current Variation to Grant Income £'000	Grant Expenditure to Date £'000	Balance Remaining £'000	% Remaining	Forecast Expenditure to 31 March 2011 £'000
U	F	Social & Community Services									
		Carers Grant	1,922			1,922	0	301	1,621	84%	1,922
U	F	Mental Health Grant	1,296			1,296	0	108	1,188	92%	1,296
U	F	Mental Health Advocacy Service	273			273	0	23	250	92%	273
U	F	Preserved Rights	2,693			2,693	0	224	2,469	92%	2,693
U	F	Supporting People Administration	320			320	0	27	293	92%	320
U	F	Learning Disabilities Development Fund	368			368	0	31	337	92%	368
U	F	Local Involvement Networks	223			223	0	19	204	92%	223
U	F	Supporting People	16,167			16,167	0	1347	14,820	92%	16,167
U	F	Personal Care at Home	2,481		-2,481	0	-2,481	0	0	#DIV/0!	0
		Environment & Economy									
U	F	Rural Bus Services Grant	1,676			1,676	0	140	1,536	92%	1,676
U	F	School Travel Advisers Grant	92			92	0	8	84	92%	92
U	F	Detrunking of Non-Core Routes	1,746			1,746	0	146	1,601	92%	1,746
U	F	Road Safety Partnerships	1,145			1,145	0	95	1,050	92%	1,145
		Economic Assessment Duty	65			65	0	5	60	92%	65
		Community Safety									
U	F	Stronger Safer Communities Fund	652			652	0		652	100%	652
		Shared Services									
		Children's Social Care Workforce	138			138	0		138	100%	138
		Human Resources Development Strategy }	1,356			1,356	0		1,356	100%	1,356
		Corporate Core									
		Community Call for Action/Overview Scrutiny Committee	12			12	0		12	100%	12
		Total Area Based Grants	45,656	0	-2,417	43,239	-2,417	2,473	40,766	94%	43,239

Ringfenced

R

U

OS

Notification

P

F

C

Ringfenced

Un-ringfenced

Outside Aggregate External Finance therefore R/U not applicable. Assume conditions attached therefore ringfenced

Provisional Notification Received

Final Notification Received

Claim Required

Oxfordshire County Council's Treasury Management Lending List
As at 01 June 2010

Counterparty Name	Lending Limits			
	Standard Limit	Overnight Limit	Group Limit	Period Limit
	£	£	£	
<u>PENSION FUND Call Accounts / Money Market Funds</u>				
Clydesdale Bank OCC Pension Fund A/c - 15 day notice A/c	50% Pension Fund Portfolio		50% Pension Fund Portfolio	3 mths
Clydesdale Bank OCC Pension Fund A/c - 30 day notice A/c	50% Pension Fund Portfolio		50% Pension Fund Portfolio	3 mths
Lloyds TSB Bank plc - Callable Deposit A/c (OXFORDCCPEN)	50% Pension Fund Portfolio			3 mths
Royal Bank of Scotland Liquidity Select A/c	50% Pension Fund Portfolio			3 mths
<u>Call Accounts / Money Market Funds</u>				
Bank of Scotland Plc - Base Plus A/c	15,000,000	5,000,000	20,000,000	3 mths
Bank of Scotland Plc - Business Current A/c	15,000,000	5,000,000	20,000,000	3 mths
Clydesdale Bank 15 day notice A/c	10,000,000	0	27,000,000	3 mths
Clydesdale Bank 30 day notice A/c	10,000,000	0	27,000,000	3 mths
Lloyds TSB Bank plc - Callable Deposit A/c	15,000,000	5,000,000	20,000,000	3 mths
Royal Bank of Scotland - Call A/c	15,000,000	5,000,000	20,000,000	3 mths
Goldman Sachs Sterling Liquid Reserves Fund	30,000,000	0	0	3 years
Hendersons Liquid Assets Fund	30,000,000	0	0	3 years
<u>Money Market Deposits</u>				
Bank Nederlandse Gemeenten N.V.	30,000,000	5,000,000	0	3 years
Bank of New York Mellon	22,000,000	5,000,000	0	2 years
Bank of Nova Scotia	22,000,000	5,000,000	0	2 years
Bank of Scotland Plc	15,000,000	5,000,000	20,000,000	3 mths
Bank of Scotland Plc (Through Broker)	15,000,000	5,000,000	20,000,000	3 mths
Barclays Bank Plc (Through Broker)	22,000,000	5,000,000	27,000,000	2 years
Barclays Bank Plc (Direct)	22,000,000	5,000,000	27,000,000	2 years
Clydesdale Bank	10,000,000	0	27,000,000	3 mths
Commonwealth Bank of Australia	30,000,000	5,000,000	0	3 years
Credit Industriel et Commercial (CIC)	15,000,000	0	0	364 days
Crown Agents Bank Ltd	10,000,000	0	0	3 mths
Debt Management Account Deposit Facility	100% Portfolio	0	0	6 mths
DnB NOR Bank	10,000,000	0	0	3 mths
DZ Bank AG Deutsche Zentral-Genossenschaftsbank	10,000,000	0	0	3 mths
English, Welsh and Scottish Local Authorities	30,000,000	5,000,000		3 years

Oxfordshire County Council's Treasury Management Lending List
As at 01 June 2010

Counterparty Name	Lending Limits			
	Standard Limit	Overnight Limit	Group Limit	Period Limit
HSBC Bank plc	22,000,000	5,000,000	0	3 years
JP Morgan Chase Bank	22,000,000	5,000,000	0	2 years
Lloyds TSB Bank plc	15,000,000	5,000,000	20,000,000	3 mths
National Australia Bank (Through Broker)	22,000,000	5,000,000	27,000,000	3 years
National Australia Bank (Direct)	22,000,000	5,000,000	27,000,000	3 years
National Bank of Canada	10,000,000	0	0	3 mths
Rabobank Group (Through Broker)	30,000,000	5,000,000	35,000,000	3 years
Rabobank Group (Direct)	30,000,000	5,000,000	35,000,000	3 years
Royal Bank of Canada	30,000,000	5,000,000	0	3 years
Royal Bank of Scotland	15,000,000	5,000,000	20,000,000	3 mths
Toronto-Dominion Bank	22,000,000	5,000,000	0	2 years

Counterparties removed since last report

Santander UK plc - Capital A/c

Santander UK plc - Main A/c

Clydesdale Bank Base Rate Tracker Plus A/c

(Counterparty has not been suspended, however this particular account has been closed)

Santander UK plc

Santander UK Time Deposit Facility

Alliance and Leicester plc

Bilbao Bizkaia Kutxa

Counterparties added since last report

Clydesdale Bank OCC Pension Fund A/c - 15 day notice A/c

Clydesdale Bank OCC Pension Fund A/c - 30 day notice A/c

Lloyds TSB Bank plc - Callable Deposit A/c (OXFORDCCPEN)

Royal Bank of Scotland Liquidity Select A/c

Clydesdale Bank 15 day notice A/c

Clydesdale Bank 30 day notice A/c

Goldman Sachs Sterling Liquid Reserves Fund

Hendersons Liquid Assets Fund

Division(s): N/A

CABINET - 22 JUNE 2010

PERFORMANCE MANAGEMENT REPORT FOR THE FOURTH QUARTER

Report by the County Council Management Team

Introduction

1. This report headlines Oxfordshire County Council's performance for the period between January and March 2010 in the four key areas of: -

- Customer
- Projects
- Finance
- People

2. It is the year-end report for 2009/10, based on the Corporate Balanced Scorecard. The full balanced scorecard is available on the web site for information. It not only shows numerical performance with a Red/ Amber/ Green (RAG) rating, but also details the baseline position, and whether the trend is positive, negative or staying the same. It indicates the risk of not hitting the target in terms of likelihood and impact, and describes action plans in place for high risk targets, or areas of poor performance.

Key issues

3. What is going well?
 - The % of 16-18 year olds who are not in education, training or employment continues to show a positive trajectory, with numbers declining.
 - The Council delivered 208 extra care housing places in 2009/10, exceeding the target of 140.

4. A number of areas require development; these are highlighted below.

- Highways assets

The objective to 'Improve the condition of the highways assets' has 2 indicators which are currently not on target. These are:

- Principal roads where maintenance should be considered. (NI 168)
- Non-principal roads where maintenance should be considered. (NI 169)

However, this is not a significant performance concern, because the National Indicators do not reflect current business needs. Cabinet approved the figures for 'principal roads' being allowed to slip to 8% so that funds could be used for non-principal roads.

The directorate has decided to focus on developing local targets which better reflect service delivery, with plans to have refreshed targets in place by quarter 1 2010/11. This is best practice going forwards for 2010/11, to help ensure that genuine performance issues are raised, where National Indicators are only one part of the whole picture.

- Climate change adaptation

A self-assessment review is under way to ascertain whether the Council has reached Level 2 in climate change adaptation planning (NI 188). Updated results will be available for Quarter 1 (April – June 2010/11) once the final data collection and analysis is complete.

- Revised economic strategy

The target to have a 'Revised economic development strategy in place' has remained amber for the second quarter in a row. Whilst the Oxfordshire Economic Partnership (OEP) is responsible for delivering the strategy, the Spatial Planning & Infrastructure Partnership (SPIP) is now overseeing this work. A pre-strategy document is being prepared by SPIP which is due to be presented and discussed at the next meeting on 28 June 2010.

RECOMMENDATION

5. **Cabinet is RECOMMENDED to note this report.**

Contact: Alexandra Bailey, Corporate Performance and Review Manager
(01865 816384)

June 2010

Corporate Balanced Scorecard

Item 8 - Annex 1

Key: Performance = Red/ Amber/ Green rating *from directorate*¹
 Grey/ NCI = no current information
 Trend = Comparison with last quarterly report²
 Risk = Risk of not hitting corporate plan target + mitigation on high risks
 08/09 Baseline = Performance at Q4 08/09, unless otherwise stated

Customer

Children Young People and Families - Customer

NB: Performance against sub-targets is only reported if the overall target is on red or amber

Target	Sub-targets	Target	2008/09 Baseline	Q1 Performance	Q2 Performance	Q3 Performance	Q4 Performance	Trend	Risk	Action plan/ Mitigation	Lead Officer
Safeguarding : Procedural	68 % Initial assessments for children's social care in 7 working days of referral (NI 59)	68%	60.8%	64.4%	66.4%	64.8%	56.7%	↓	High	Tighter monitoring of data entry is now being addressed by the Children and Families Strategic and Professional Interest Group (SPIG).	Noreen Collins

¹ Where the directorate did not provide one, a RAG status was inserted based on the information provided.

² Where data is generated annually, trend is matched with previous year

82% Core assessments for children's social care in 35 work days of commencement (NI 60)	82%	79.4%	74%	76.3%	74.8%	63.2%	↓	High	Likely to improve as the process issues are more closely monitored by SPIG and Area leads. (Wide variation between Areas.)	Noreen Collins
	86.7%	81.8%	82%	75.0%	83.3%	83.3%	=	Low	Maintaining recent progress.	Fran Fonseca
	91%	89.7%	67.0%	75.1%	80.1%	86.6%	↑	Medium	There is possibly a recording issue. Variation between Areas, so being addressed by Area Heads.	Fran Fonseca
	100%	100%	97.8%	98.9%	98.0%	98.7%	↑	Low	Operational issue being addressed by SPIG. RAGed green because expected to be on target by year end. Year end figures available for Q1 2010/11.	Noreen Collins
	65%	55.1%	43.9%	74.6%	67.9%	63.6%	↑	Low	Upward trend arrow indicates nearer target – a higher percentage is not necessarily an indicator of better performance. (We do not necessarily want to maximise numbers of referrals going on	Noreen Collins

										to initial assessment.)	
	Stability of Placements (NI 62)	<11.7% young people having three or more placements per year	9.2%	9.4%	9.4%	10.2%	9.6%	↑	Low		Fran Fonseca
	Less than 10% Child protection plans lasting 2 years or more (NI 64)	<10%	10.8%	11.5%	7.3%	10.9% (end of December data)	12.3%	↓	Medium	A protocol / reviewing system is already in place to address the length of time on the register. SPIG to focus additional resources support plans for children whose plans are coming up to the two year mark.	Noreen Collins
	No more than 15% Children becoming the subject of a Child Protection Plan for the second time (NI 65)	<15%	11.5%	28.1%	16.1%	20.7%	19.6%	↑	Medium	Reported to DLT & SPIG and plan agreed for in-depth analysis of re-registrations to identify reasons, and case files to be reviewed via QA process.	Noreen Collins
	Reduce emergency hospital	107.75	106.5	31.22	NCI	60.96 (Q2 figure,	86.3 (Q3 figure, cumulative)	↑	Medium	Action plan in place. Q4 data available for Q1	Paula Tansley

	admissions due to injury to 107.75 per 10,000 over the year (NI 70)					cumulative)				2010/11.	
Page 144 Narrowing the gap	Narrowing the gap in the Early Years Foundation Stage between lowest 20% and County median. (NI 92)	31.3% (Ac Yr 2009 / 10)	34.1% (Ac Yr 2007/08)	NCI	33.5% (Ac Yr 2008/09)	33.3% (Ac Yr 2008/09)	33.3% (Ac Yr 2008/09)	↑	Low	(Measured annually)	Annie Davy
	At least 46.2% Children in care reaching Level 4 in English at KS2 (NI 99)	46.2% (Ac Yr 2009 / 10)	52.9% (Ac Yr 2007/08)	NCI	21.4% (Ac Yr 2008/09)	21.4% (Ac Yr 2008/09)	21.4% (Ac Yr 2008/09)	↓	Medium	(Measured annually) Work under way on value added perspective	Venetia Mayman
	At least 53.8% Children in care reaching Level 4 in Maths at KS2 (NI 100)	53.8% (Ac Yr 2009 / 10)	35.3% (Ac Yr 2007/08)	NCI	14.3% (Ac Yr 2008/09)	14.3% (Ac Yr 2008/09)	14.3% (Ac Yr 2008/09)	↓	Medium	(Measured annually) Work under way on value added perspective	Venetia Mayman
	At least 16.3% Children in care achieving 5 A*-C GCSEs at KS4 (including English & Maths) (NI 101)	16.3% (Ac Yr 2009 / 10)	4.9% (Ac Yr 2007/08)	NCI	8.3% (Ac Yr 2008/09)	8.3% (Ac Yr 2008/09)	8.3% (Ac Yr 2008/09)	↑	Medium	(Measured annually) Work under way on value added perspective	Venetia Mayman
	Less than 5% of young people in YJS receiving conviction then sentenced to custody (NI 43)	<5%	4.3%	8.1%	5.6% (Q2 figure)	Expecting Q3 figures in Feb.	6.0% (Q1-3 figure)	↑	Medium	Subject of a report card and a management action plan which have resulted in performance going in the right direction. This is a	Jan Paine

										priority area for the service. Q4 data available for Q1 2010/11.	
Reduce inequalities gap at Level 3 qualification (NI 81) to 28 percentage points	28 percentage points (2008 / 09)	31.1 percentage points (2006/07)	NCI	31.7 percentage points (2007/08)	Predicted to be similar to 2007/08 results. Data expected April 2010.	Predicted to be similar to 2007/08 results. Data expected April 2010.	=	Medium	31.7 percentage points (prediction). Comprehensive 14-19 plan in place.	Sally Taylor	
Secondary school persistent absence rate (NI 87) to be no more than 5%	5% (Ac Yr 2009 / 10)	5% (Ac Yr 2007/08)	5.78%	NCI	4.84% (Ac Yr 2008/09)	6.22% (Terms 1-2)	↓	Medium	Despite currently being amber, we are on target for this because absences will fall in year. (Terms 1 - 2 were affected by snow)	Jan Paine	
Increase young people's participation in positive activities (NI 110)	78.5%	71.7%	NCI	NCI	Data expected in Feb.	61.7%	↓	Medium	This is measured annually by the national 'Tell Us' survey; performance is based on a low sample size. Next year, we will ensure that more schools participate so that there is a more representative result.	Jan Paine	
Reduce children entering CJS for the first time to no more than 856. (NI 111)	<856	523	60	83 (Q2 figure)	Q3 Data expected in Feb.	198 (Q1-3 figure)	↑	Low	Q4 data available for Q1 2010/11.	Jan Paine	

	Establish a further 16 Children's Centres by March 2014 to bring a total of 45 countywide (NI 109)	45	29	31	31	45	45	↑	Low		Jan Paine
	Permanent exclusions from schools (NI114) – no more than 77 in Academic Yr 2009/10 (N.B. Updated target)	45	66 (Ac Yr 2007/08)	85 exclusions	81 exclusions (Ac Yr 2008/09)	21 exclusions (Terms 1-2)	28 (Terms 1-3)	↑	Medium	Improvement so far on last year, particularly in Southern Area. Action to be led by Area Heads	Jan Paine
	Increase 16-18s in education / training / employment (NI 117) – no more than 4% not in education/ training/ employment (NEET)	4%	4.0% NEET	6.7% NEET	7.1% NEET	6.4% NEET	6.2% NEET	↑	Medium	The Children's Services Scrutiny Committee has been reviewing this work and looking into the impact of Learning & Skills Council's dissolution and law change. In-depth analysis of the statistics is being undertaken.	Jan Paine
Health	Under-18 conception rate - no more than 22.3 per 1,000 (NI 112)	<22.3 per 1000	27.5 (2006)	29.6 (2007)	NCI	28.0 (2008 provisional)	29.5 (2008)	↑	High	New action plan currently being developed & support officers being trained. The Children's Services Scrutiny Committee are	Paula Tansley

										also reviewing this work.	
	Under-18 conception rate - reduction of 21% from 1998 baseline (Corp Target)	-21%	-12.2% (2006)	-5.6% (2007)	NCI	-10.8% (2008 provisional)	-6.0% (2008)	↑	High	As above.	Paula Tansley
	No more than 15.3% of Year 6 children obese (NI 56a)	15.3% (Ac Yr 2009/10)	15.4% (Ac Yr 2007/08)	15.8% (Ac Yr 2008/09)	15.8% (Ac Yr 2008/09)	15.8% (Ac Yr 2008/09)	15.8% (Ac Yr 2008/09)	=	Low	(Measured annually)	Paula Tansley
Page 147 Raising achievement: Student performance	Increase pupils achieving 5 A* – C GCSEs inc E/M to 60% by Ac Yr 2009/10 (NI 75)	60% (Ac Yr 2009/ 10)	50.5%	NCI	52.8% (Ac Yr 2008/09)	52.4%* (Ac Yr 2008/09)	52.9%* (Ac Yr 2008/09)	↑	Medium	*Slight fluctuation due to figures being revised by Department for Children, Schools & Families. Action plans in place, and on track.	Sally Taylor
	Increase pupils achieving 5 A* – C GCSEs so that Oxfordshire is in the top 25% of Local Authorities by 2014	Top 25%	36 th percentile (second quartile)	NCI	NCI	33 rd percentile: second quartile (Ac Yr 2008/09)	33 rd percentile: second quartile (Ac Yr 2008/09)	↑	Medium	See action above.	Sally Taylor
	Achievement of at least 78 points (by 55% of pupils) across the early learning foundation stage	55% (Ac Yr 2009 / 10)	50.3% (Ac Yr 2007/08)	NCI	51.5% (Ac Yr 2008/09)	51.6%* (Ac Yr 2008/09)	51.6%* (Ac Yr 2008/09)	↑	Low	*Slight fluctuation due to figures being revised by Department for Children, Schools & Families.	Annie Davy

	profile (NI 72)									Up on previous year but narrowly missed target.	
	Achievement at Level 4 or above in both E&M at KS2 (NI 73)	79% (Ac Yr 2009 / 10)	72.7% (Ac Yr 2007/08)	NCI	72.4% (Ac Yr 2008/09)	72.4%* (Ac Yr 2008/09)	73%* (Ac Yr 2008/09)	=	Medium	*Slight fluctuation due to figures being revised by Department for Children, Schools & Families. Under analysis from Scrutiny Committee, with particular regard to value added aspects.	Sally Taylor
	Progression by 2 Levels in English between KS1 and KS2 (NI 93)	89%	85.0% (Ac Yr 2007/08)	NCI	NCI	85.3% (Ac Yr 2008/09)	85.3% (Ac Yr 2008/09)	=	Low		Sally Taylor
	Progression by 2 Levels in Maths between KS1 and KS2 (NI 94)	85%	81.0% (Ac Yr 2007/08)	NCI	NCI	82.1% (Ac Yr 2008/09)	82.1% (Ac Yr 2008/09)	↑	Low		Sally Taylor
Raising achievement : School performance	Numbers of schools achieving 'good' or 'outstanding' judgments in Ofsted inspections.	59%	59.4% (Ac Yr 2008/09)	57.5%	59.4%	60.0%	50.0%	↓	Medium	Fluctuation is due to the fact that a different cohort of schools is inspected each quarter.	Sally Taylor
	Number of schools in special measures (NI 89a) – target is to have no schools in special	0	2	1	1	3	3	=	High	Action plans to get schools off special measures are on track, and have been endorsed by	Sally Taylor

	measures									Ofsted.	
	Average time (months) spent in special measures (NI 89b)	12 months	11 months	NCI	18 months (Ac Yr 2008/09)	18 months (Ac Yr 2008/09)	18 months (Ac Yr 2008/09)	↓	Low	HMI have commented on the speed we have been able to turn around the schools currently on special measures. Oxfordshire County Council has been performing within the timeframe.	Sally Taylor

Corporate Core - Customer

Target	Target	08/09 Baseline	Q1 Performance	Q2 Performance	Q3 Performance	Q4 Performance	Trend	Risk	Action plan/ Mitigation	Lead Officer
OCC achieves level 3 Equality Standard by March 2010	Level 3	N/A: baseline year	Yes	Yes	Yes	Achieved Level 3 of the Equality Standard	=			Adrian Harper Smith
2010/11 Corporate Plan delivered within agreed timeline	Delivered in agreed timescales	Yes			Yes	Yes	=			Maggie Scott
Agreed set of 90% SMART delivery plan targets for the Sustainable Community Strategy in place by March 2010	90%	10%	10%				↑		A paper on SMART targets is due to go to the Public Service Board in July 2010.	Claire Evans/ Alexandra Bailey
OCC achieves a level 4 in the 2009 Use of Resources assessment	4	4			Level 3 achieved	Level 3 achieved	=			Laura Grainger
Revised medium term priorities agreed by new Cabinet by November 2009	November 2009	N/A			Workstream contained within Corporate Plan delivery	Workstream contained within Corporate Plan delivery	=			Maggie Scott
Baseline year for the number of CAA red flags and performance reporting	Baseline year	N/A: baseline year			No CAA red flags		=			Tracy Luck
Baseline year for reputation survey	Baseline year	N/A: baseline year					↑			Maggie Scott

Achieve a 10% increase in the employee engagement index	10%	N/A: baseline year				Based on biennial survey. Will be reported at end of Q1 2010/11.	=		Staff survey scheduled to take place in Summer 2010.	Steve Munn
Increase the number of apprentices to 54 by April 2010	54	tbc			60	60	=			Ruth Jackson- Haile

Community Safety and Shared Services - Customer

Target	Target	08/09 Baseline	Q1 Performance	Q2 Performance	Q3 Performance	Q4 Performance	Trend	Risk	Action plan/ Mitigation	Lead Officer
Deliver Oxfordshire Fire & Rescue's '365 alive' targets by saving 37 more lives, £10 million and delivering 84000 safety messages	37 lives, £10 million and 84,000 messages				No deaths from accidental dwelling fires, 70,308 safety messages delivered		=			Dave Etheridge
Save £100,000 for vulnerable consumers each year through protecting against the activities of doorstep conmen	£100,000	£71700	£20,450		£82,649	£122,644 saved by 31st December 2009	↑			Richard Webb
Support reduction in the number of children and young people entering the CJS for the first time from the March 2009 level	<523	523		145			=			Tan Lea
90% of posts are recruited to within 60 days, from the time between a post request being received by Shared Services and a contract or offer being issued, based on timeframes met by Shared Services staff.	90%	New for 09/10			Performance over the last 6 months has averaged 89%		=			John Parry
Increase customer satisfaction with shared services to 89%	89%	86%	92%		87%	94%	↑			Nicola Leavesley
For Oxfordshire & Buckinghamshire GTS to attain the customer service excellence award	Customer Excellence Award	New for 09/10					=		2nd Assessment visits on 22 and 23 April 2010	Gary Brewer

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Basket of LAA targets (NIs 20, 21, 32 & 40)	Targets exist for individual indicators	Baselines exist for individual indicators					=			Bill Oddy
Basket of NIs (33i, 33ii, 49i, 49ii & 49iii) (182, 183, 184 & 190)	Targets exist for individual indicators	Baselines exist for individual indicators					=			Richard Webb, Dave Etheridge

Environment and Economy - Customer

NB. Performance against sub-targets is only reported if the overall target is on red or amber

Target	Sub-targets	Target	08/09 Baseline	Q1 Performance	Q2 Performance	Q3 Performance	Q4. Performance	Trend	Risk	Action plan/ Mitigation	Lead Officer
Page 154 Improving the condition of Highways assets	Principal roads where maintenance should be considered. (NI 168)	4%	4%					=		New performance indicators are being developed to reflect the business better than these National Indicators. Values are rounded to the nearest percent and as such this appears more significant than it is. Risk RAG status is red because our strategy states that principal roads funding may be diverted to non-principal roads if the need there is greater, and provided NI168 remains below 8%.	Kevin Haines
	Non-principal roads where maintenance should be considered. (NI 169)	8%	8%					=		As above: new performance indicators are being developed, and figures here are rounded to the nearest percent. Effects of bad weather should be partially offset by additional	Kevin Haines

Page 155										grant funding, new contractual arrangements and a greater proportion of value-engineered schemes. However, Risk RAG status is Red because condition surveys were carried out before the severest weather and the effects are still being quantified.	
	Percentage of crossings with facilities for the disabled	88%	87.4%	87.1%	87.1%	88.1%	88.4%	↑			Tim Atkinson
	Condition of footways	<12.4% above the threshold for acceptable conditions.	6%	NCI	6%	6%	6%	=		Effects of bad weather should be partially offset by additional grant funding and new contractual arrangements. However, Risk RAG status is Red because condition surveys were carried out before the severest weather and the effects are still being quantified.	Kevin Haines
Target	Sub-targets	Target	08/09 Baseline	Q1 Performance	Q2 Performance	Q3 Performance	Q4 Performance	Trend	Risk	Action plan/ Mitigation	Lead Officer
Reducing traffic congestion in Oxfordshire	Average journey time during the morning (NI 167)	No target set	4 mins, 17 secs (07\08)			Only just received 2008\09 data. Results will be known for Q4	4 mins, 14 secs (08\09)	↑			Phil Earnshaw

	Local bus passenger journeys originating in the authority area (NI 177)	36.1m	36,238,974	36,238,974 (08/09 Outturn)	NCI	17,430,318 (provisional)		=		Bus patronage levels remain very high compared with other authorities across the country and as such our services are still viewed as excellent.	Dick Helling
	Bus services running on time (NI 178)	1.22 mins frequent 77% non-frequent	1.40 mins frequent 65% non-frequent	1.40 mins frequent 65% non-frequent (08/09 outturn)	NCI	1.29 mins frequent. 73.4% non-frequent	1.62 mins frequent; 72% non-frequent (09/10 outturn)	↓		Road works on the High Street have impacted heavily on 'frequent' bus services in the city centre, as expected. The road works will however improve the situation for bus services and we will not need to impact on the High Street for many years to come.	Dick Helling
	Children travelling to school – mode of travel usually used (NI 198)	Walking: 43.4% Cycling: 9.1% Car: 21.7% (5-16 range)	Walking: 40.5%, Cycling: 8.5%, Car: 24.9% (5-16 range)	Walking: 40.5%, Cycling: 8.5%, Car: 24.9% (5-16 range)	This is an annual measure	Walking: 41.7%, Cycling: 8.9%, Car: 24.2% (5-16 range)	Walking: 41.7%, Cycling: 8.9%, Car: 24.2% (5-16 range)		=		New, more effective interventions are in place to facilitate change school travel behaviour. Overall, change is in the right direction.

Target	Sub-targets	Target	08/09 Baseline	Q1 Performance	Q2 Performance	Q3 Performance	Q4 Performance	Trend	Risk	Action plan/ Mitigation	Lead Officer
Helping deliver a World Class Economy Page 157	90% milestones met to achieve L2/L3 adult skills (NI 163 / NI 164)	<u>Level 2</u> 09/10 target = 77.5% <u>Level 3</u> 09/10 target = 59.7%	<u>Level 2</u> 76.1% <u>Level 3</u> 60.3%			2009 figures available late summer 2010	2009 figures available late summer 2010	=		Although this target feeds into the corporate priority of a world class economy, the target is not allocated to the appropriate directorate/service. This will be rectified in Q1 of 2010/11.	Dave Waller
	Revised economic development strategy in place	Revised Economic Development strategy in place	New indicator for 09/10				Initial workshop held	=		Align Oxfordshire Economic Partnership strategy development with commissioning from Spatial Planning & Infrastructure Partnership.	Dave Waller
	Co-ordinated response to formal stage of local development consultations	80% over the year	New indicator for 09/10			87.5%	100%	100%	=		

Reducing waste going to landfill (All sub-targets are green)					=			Steve Lewington
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Target	Sub-targets	Target	08/09 Baseline	Q1 Performance	Q2 Performance	Q3 Performance	Q4 Performance	Trend	Risk	Action plan/ Mitigation	Lead Officer
Tackling local authority impact on climate change	Achieve 18% reduction in CO ₂ emissions (NI 185) by 2012	Oxfordshire's Local Authorities target is a reduction of 6%. The County Council has a target to reduce its own footprint by 2% by 2010.	3% reduction against 6% target	2.4%	We are currently trying to obtain quarterly figures	We are waiting for Q3 data from Oxford City, Vale of White Horse and South Oxford.	3-5% reduction (based on estimated and predicted end of year data)	↑		The RAG status is Amber because some of the data is missing due to a new energy contract and a delay in invoicing. The quarterly trend is up because we are now able to anticipate our end of year figures. OCC data is indicating that we should reach the 3% reduction target for 2010/11.	Vickie Cossins
	Reach Level 2 in climate change adaptation planning (NI 188)	Level 2	Level 1	Currently at Level 1	On target to reach level 2	Showing Red RAG status due to a lack of staffing resource.	Self-assessment review under way, with help of additional staff resource to end April.	=		Progress report has been submitted to the Climate Change Board and resourcing issues arising in Q3 have been temporarily resolved. Decision regarding target level reached will be made when data collection is complete.	Susie Ohlenschlager
Reducing road traffic casualties	People killed or seriously injured in road traffic accidents (NI 047)	<274	343	359	336	340	345	↓		More accidents are being coded as serious by the police as coding accuracy increases. Transport Management Team agreed to have a separate Business Management Clinic around these two indicators	Geoff Barrell
	Children killed or seriously injured in road traffic accidents (NI 048)	<23	24	28	24	23	20	↑		Transport Management Team agreed to have a separate Business Management Clinic around these two indicators	Geoff Barrell

Target	Target	08/09 Baseline	Q1 Performance	Q2 Performance	Q3 Performance	Q4 Performance	Trend	Risk	Action plan/ Mitigation	Lead Officer
Improving customer satisfaction for all E&E services							=		For 2010/11, E&E will be expanding its customer satisfaction information to include all relevant areas within services.	Dick Helling/ Christine Howard
Progress at strategic sites (80% of strategic sites progressed to agreed timescales)				80%			↑		For 2010/11, Arzu Ulusoy-Shipstone will be looking at the delivery framework and the readiness of individual Directorates to deliver this objective.	Rob Dance
Page 160 Deliver 10 additional drainage schemes to alleviate flooding	New indicator for 09/10	In 2008-09 we constructed 54 schemes spending about £1.2 million		Finance for the year has enabled 10 additional schemes to be completed.	In 2009-10 we will have constructed 33 schemes from the £700K budget (no additional money this year)		=		Additional funds have been made available through the Medium Term Financial Plan which place us in a better position to deliver more schemes in the coming year. Hence Risk status is Amber subject to a programme being developed. Further work will be done to provide a more strategic measure of performance. The Environment Agency has already stated that Oxfordshire County Council is well in advance of other authorities in dealing with the outcome of the Pitt review so we need to reflect this in our measures.	Gordon Hunt

Social and Community Services – Customer

Target	Target	08/09 Baseline	Q1	Q2	Q3	Q4	Trend	Risk	Action plan/ Mitigation	Lead Officer
Achieve excellent rating in at least two of the 7 service outcomes in the 2009 Annual Report from the Care Quality Commission	2	1					=		Action plan agreed with CQC and monitored monthly. All actions currently green. Although no areas are excellent, report shows clear improvement. CAA rating unaffected.	John Jackson
Page 101 In the CQC inspection we will score <ul style="list-style-type: none"> • Excellent for Choice and Control, • Good for Health and Wellbeing, • Adequate for Safeguarding, • Promising prospects for improvement 	Specific scores	n/a					=	'Good' rating for choice and control and health & wellbeing. 'Adequate' for safeguarding; promising prospects for improvement. Positive 6 month review on April 14 2010. All actions on target. Comments of the inspector included 'very impressive'; 'clear impact' and 'lots of good practice	John Jackson	
Increase the number of adult learners gaining a full L2 qualification (including diplomas, equivalent to 5 GCSEs at grade A – C including English and maths) by 50% over the period 2008/09 to 2010/11	50%	tbc					↓		This priority includes other partners as well as Adult Learning. Internal audit have reviewed the data and 'the bottom line at the moment is that the LSC performance data (around 1,600 cases) is well over the target figure (720 cases) to achieve the	Jane Dixon

									reward grant.'	
Increase active library membership to more than 140,000 in 2009/10	>140,000	n/a	137,873	138,895	140,515	140,396	=			Caroline Taylor
Increase the proportion of people placed at two and three star residential providers from 74% (Sept 2008) to 80% (Sept 2009)	80%	74%	78%	82%	86%	87%	↑			Simon Kearey
Increase the proportion of registered providers scoring good or excellent on safeguarding to 70%	70%	n/a	86%	90%	NCI		↑		CQC changed the reporting format such that safeguarding is no longer specifically reported on. At the time of the change 116/125 (93%) were rated good or excellent. Since then we have had a significant improvement on the overall ratings, hence the green rating	Simon Kearey
Reduce the average number of people in a hospital bed who are fit for discharge to 70 or fewer (NI 131)	<70	88	69	73	69	72	↑		Directorate has rated this green due to significant improvement on last year, where performance was 86. There are plans in place to further reduce this for 2010/11.	Paul Purnell
Basket of two remaining LAA targets NI 135: Carers receiving needs assessment or review, or advice and information NI 141: Number of vulnerable people achieving independent living	NI 135 target is 20% NI 141 target is 60%	n/a			NI 135 = 5% NI 141 = 65%	NI 135 = 19% NI 141 = 67%	↑		For NI 135, additional records are being checked and performance expected to be ahead of target. For NI 141, performance is above target after three quarters, Qtr 4 data still being collected.	Varsha Raja (NI135) Simon Kearey (NI141)
Basket of remaining NIs		n/a					↑		As at 4/5/10, all indicators are above target, but one (NI 132) which has shown improvement in the last	Paul Purnell

■ Projects

Children Young People and Families - Projects

Target	Q1 Performance	Q2 Performance	Q3 Performance	Q4 Performance	Trend	Risk	Action plan/ Mitigation	Lead Officer
<u>Success Primary project</u> - PID to be completed by Q4 - Steering group in place by Q4					=		Base line data in place. Governance agreed through Primary Achievement Board. Launch event took place 19/01/2010. Partnerships have signed up to the strands for delivery. Q1 will see action plans for partnership strands delivered.	Jan Paine
<u>Success Secondary Project (Primary & Secondary)</u> - 4 th progress review conference to be held by Q3					=		Sharing good practice and review of progress. Conference 4 took place in Nov 2009. Conference 5 is booked and the flyer has gone out for 30 June 2010.	Jan Paine
<u>Building Schools for the Future</u> 'Readiness to deliver' submission prepared for DCSF by Q4			Resubmission date 29 January.		↑		Successful resubmission of PID followed by clarification meetings with Partnership for Schools (Pfs) leading to formal Remit Meeting 21 April 2010 of Pfs with OCC (CEO, Finance Director, Director for CYPF and others). Next steps: establish the full project team, work programme and action plans to deliver next milestones. Strategy for change due March 2011.	Roy Leach

Target	Q1 Performance	Q2 Performance	Q3 Performance	Q4 Performance	Trend	Risk	Action plan/ Mitigation	Lead Officer
<u>Implementation of the 14-19 year old strategy</u> - 7 partnerships audited against the minimum entitlement for learning (as described in the 14 – 19 education plan) by Q4					=		Audit completed. All partnerships meet minimum entitlement for pre-16 leavers, but fall short re post-16. Actions to address gaps will be taken through Oxfordshire 14-19 Strategic Partnerships.	Sandra Higgs
<u>Children's Centres Phase 3 project 'Readiness to deliver' submission prepared for DCSF by Q4</u>					=		Progress report completed at the start of the year indicated that Phase 3 development is progressing according to original plans.	Clare Abolins
<u>Transfer of 16-19 funding</u> Preparations complete for the funding transfer for 16-19 from LSC to the local authority by Q4					↑		Completed.	Paula Tansley Sandra Higgs

Corporate Core – Projects

Target	Q1 Performance	Q2 Performance	Q3 Performance	Q4 Performance	Trend	Risk	Action plan/ Mitigation	Lead Officer
Efficiencies programme on track against agreed milestones					=		Strong performance management framework will provide an early warning of any problems to ensure that those problems are addressed by timely management action.	Paul Gerrish
Equalities programme on track against agreed milestones					=			Adrian Harper Smith
Consultation programme on track against agreed milestones					=			Maggie Scott
Lead Oxfordshire on track against agreed milestones as reported to the Change Management Board					=			Ruth Cane

Community Safety and Shared Services – Projects

Target	Q1 Performance	Q2 Performance	Q3 Performance	Q4 Performance	Trend	Risk	Action plan/ Mitigation	Lead Officer
Fire & Rescue Service integrated risk management plan action plan 2009-2010 on track against agreed milestones					=			Martin Crapper
Delivery against the Fire & Rescue equality & diversity strategy 2008-2018 (specific targets to be met by 2013)				Data available middle of May 2010.	=		Good performance trajectory throughout the year: confident of positive outcome at the end of Q4.	Colin Thomas
Delivery against the shared services business case				100% savings delivered	↑		Monitoring continues to ensure delivery	Ron Sweetman
Review of Safer Communities Unit completed by March 2010					=		Awaiting final outcome; briefings to Informal Cabinet shortly.	John Parry
Site improvement programme for Council run traveller sites on track against agreed milestones					↑			Gary Brewer
To finalise and implement the results of the review of the emergency planning structure within the county					↓		Group identified to work on implementation and first meeting planned.	Bethan Morgan

Environment and Economy – Projects

Target	Q1 Performance	Q2 Performance	Q3 Performance	Q4 Performance	Trend	Risk	Action plan/ Mitigation	Lead Officer
Transform Oxfordshire on track against agreed milestones					=		<p>Queen Street: Main project is finished, with residual work still to do.</p> <p>Magdalen St/George St RAG remains the same due to this project being on hold.</p> <p>Western Gateway: Modelling is being extended, to look at additional options for comparison purposes (July 2010)</p> <p>Approach Roads: See Western Gateway.</p> <p>Completion date set to be September 2010</p>	John Cramer
Local Transport Plan 3 on track against agreed milestones					↑		<p>Consultation on policies took place as planned. Scenarios consultation postponed until after the election. We are on schedule to complete LTP3 within the new target date.</p>	Jo Clegg
Retender Highways Contract on track against agreed milestones					=		<p>Contract let. New measure for 10/11 to cover Mobilisation/Transition. Need to ensure that the cost of both of these is fully identified.</p>	Grant Cawte
Procurement of residual waste contract on track against agreed milestones					↑		<p>Working towards contract close in the summer. Planning appeal date confirmed as 6th July. Resubmissions of planning expected in April.</p>	Andrew Pau
Develop and deliver capital programme on track against agreed milestones		82%	84%	80%	↓		<p>Of 166 projects currently in progress, 85 projects have green status and 42 are complete</p>	Laura Hutchins
Programme to improve customer engagement and service delivery on track against agreed milestones					↑		<p>This will be encompassed as part of the Customer target 'Improving customer satisfaction for all E&E services' for 2010/11 reporting.</p>	Jerry Auton

Social and Community Services – Projects

Target	Q1	Q2	Q3	Q4	Trend	Risk	Action plan/ Mitigation	Lead Officer
Delivery of the Information project in line with the plan					=		Project has delivered its first major output - the Information, Advice (and advocacy) Strategy. Stage 2 (deliverables, resources, budget and timescales) are currently being discussed with the Programme Manager. This will inform the next stage. Decision is due early May 2010.	Simon Kearey
Thame library delivery plan on track					=		Contractors on site. On schedule for completion/opening July 2010.	Caroline Taylor
Complete the hand over Cogges to the new Trust by March 2010					=		The shadow board has commissioned a business planning consultant to review the options for the operation of Cogges. Negotiations with the board are still on-going.	Martyn Brown
Delivery of Extra Care 140 housing places in 2009/10				208	↑		Nicholson House has 60 flats operational as Extra Care Housing by April 2010. Greater Leys scheme (148 units) is now just awaiting staff recruitment with likely start date is May 2010.	Nick Welch
Ensure all people in the north of the county who are eligible for a personalised budget have one by March 2010		160 people have now been allocated a personal budget.	254 people have now been allocated a personal budget.	420 people have now been allocated a personal budget.	↑		Support to staff in North ongoing with workshops undertaken. Working with service users (older people, physically disabled, etc) to test methods of transitioning existing users. Accelerated review is bringing more numbers into self directed support.	Alan Sinclair
LD Framework Tender completed and mini-competitions carried out to ensure services are in place by April 2010					↓		Evaluation of tenders complete. Recommendation for award of contracts signed off. Mini-competitions in preparation. Exemption report being prepared to	Ann Nursey

							extend 2 day services contracts to allow for modification of mini-competitions to reflect Self Directed Support (SDS).	
Complete the Adult Social Care Systems and Process Review by March 2010					=		Report completed, to be distributed to DLT this week.	Simon Kearey

■ Finance

Children Young People and Families - Finance

Target	Q1 Performance	Q2 Performance	Q3 Performance	Q4 Performance	Trend	Risk	Action plan/ Mitigation	Lead Officer
Projected year end revenue spending within budget		CYP&F is forecasting an in-year overspend of £1.4m as per draft August 2009 Monthly Monitoring Report.	CYP&F is forecasting an in-year overspend of 400k as per November 2009 Monthly Monitoring Report.	CYP&F is forecasting an in-year underspend of £92k once carry forwards are taken into account (as per February 2010 Monthly Monitoring Report.)	↑		Continued projected overspends on placements and asylum are partially offset by the anticipated underspends on Home to School Transport and the balance of the DSG.	Paula Tansley
All service plan budgets within agreed limits	See above	See above	See above		=		See above	Paula Tansley

Target	Q1 Performance	Q2 Performance	Q3 Performance	Q4 Performance	Trend	Risk	Action plan/ Mitigation	Lead Officer
On track to achieve agreed efficiencies savings target				Approx. £3m savings achieved	=		Early indications are showing that the directorate is likely to have an in-year underspend for 2009/10 which suggests that the savings target of approx. £3m has been achieved. However, savings may not have been achieved in the way originally stated and further work is needed to confirm that the underspends can be recorded as valid efficiency savings.	Paula Tansley
Capital programme within agreed quality, cost and timetable criteria	Capital spend forecast (including schools capital) has increased by £1.6m for 2009/10.	The in-year forecast for Children, Young People & Families is £0.2m less spent than budgeted for the year.	The in-year forecast for Children, Young People & Families is £1.3m less spent than budgeted for the year.	The monthly monitoring report going to Cabinet in April (based on position to the end of Feb) is forecasting expenditure of £38.0m (excluding schools). This is a decrease of £0.8m from the latest approved capital programme that went to	=		A review of how adjustments made between capital and revenue are included in the capital programme has been carried out. The results impact on the Children, Young People and Families directorate. The saving shown in CYP&F is £1.0m in 2009/10. The capital Strategy will be tabled at DLT including details of how contracts are being amended in light of any slippages.	Paula Tansley

Target	Q1 Performance	Q2 Performance	Q3 Performance	Q4 Performance	Trend	Risk	Action plan/ Mitigation	Lead Officer
				Council in Feb 2010.				

Corporate Core - Finance

Target	Q1 Performance	Q2 Performance	Q3 Performance	Q4 Performance	Trend	Risk	Action plan/ Mitigation	Lead Officer
Projected year end revenue spending within budget		5% overspend	6.4 % overspend	1.7% underspend	↑			Tim Paul
All service plan budgets within agreed limits			All service plan budgets are within agreed limits except ICT which is reporting an overspend of £2.25m (12% of gross budget)	L&D is reporting an overspend of 0.7%. All other services are reporting underspends, with ICT reporting no variance.	↑			Tim Paul
On track to achieve agreed efficiencies savings target		59%	Currently meeting 58% of efficiency targets	58%	=		The ICT action plan is being implemented: Phase 1 of an establishment review completed in 09/10. Phases 2 & 3 will be completed this year. Controls have been put in place, such as no development work to commence without a specific budget being identified.	Tim Paul

Community Safety and Shared Services - Finance

Target	Q1 Performance	Q2 Performance	Q3 Performance	Q4 Performance	Trend	Risk	Action plan/ Mitigation	Lead Officer
Projected year end revenue spending within budget				Current directorate underspend £0.6m (-2%)	↓			Head of service
All service plan budgets within agreed limits					=			Head of service
On track to achieve agreed efficiencies savings target				Forecasting £723,000 out of target to meet £885,000	=			Head of service
Capital programme within agreed quality, cost and timetable criteria					=			Head of service

Environment and Economy - Finance

Target	Q1 Performance	Q2 Performance	Q3 Performance	Q4 Performance	Trend	Risk	Action plan/ Mitigation	Lead Officer
Projected year end revenue spending within budget. E&E target = +/- 1%	1%	-0.03%	0.69%	-0.49%	=		Based on provisional outturn.	Rob Finlayson
All service plan budgets within agreed limits E&E target = 0%	0%	0%	0%	0%	=		All service plan budgets are equal to the formal budgets for managers. There is no difference between what was agreed in the service plans and what members have agreed as funding levels.	Rob Finlayson
On track to achieve agreed efficiencies savings target E&E target = 100%		Predicted to be £1.322m	Predicted to be £1.180m	Estimated at £1.65m	↑		Based on provisional outturn	Rob Finlayson
Capital programme within agreed original cost criteria E&E target = +/- 10%	113%	95%	94%	92%	↓		Based on provisional outturn	Rob Finlayson

Social and Community Services – Finance

Target	Q1 Performance	Q2 Performance	Q3 Performance	Q4 Performance	Trend	Risk	Action plan/ Mitigation	Lead Officer
Projected year end revenue spending within budget	£1.38 m overspend	£0.864 m overspend	£0.478 m overspend	Forecast £772k overspend, a variation of 0.46%. (Based on Feb outturn)	↑		Despite being within the 0.5% tolerance for 'green' performance in this area, it has been rated 'amber' as there remain forecast overspends on the pooled budget primarily related to the Primary Care Trust.	Maureen Elliott
All service plan budgets within agreed limits					↑		See above	Maureen Elliott
On track to achieve agreed efficiencies savings target	£9.31	£10.018	£10.112	Data not available until May	↑			John Jackson
Capital programme within agreed quality, cost and timetable criteria				£2.5m slippage	=		Improved monitoring has reduced slippage. The year end report will compare outturn to the budget set at the beginning of the year with approximately £2.5m slippage on a budget of £7.9m.	Simon Kearey

 *People*

Children Young People and Families – People

Target	Q1 Performance	Q2 Performance ³	Q3 Performance	Q4 Performance	Trend ⁴	Risk	Commentary	Lead Officer
Deliver staff number reductions of 2.5%		Increase of 2.87%	Increase of 3.93%	Increase of 6.77%	↓		Figures show difference in Full Time Equivalent (FTE) employed from the end of Q1 baseline.	Andrew Butler
Average sickness days per Full Time Employee (FTE) - 7 days	6.58	5.57	6.82	NCI – available mid May	↓			Andrew Butler
5% of employees BME	7.27%	7.51%	7.78%	7.45 %	↓			Andrew Butler
2.5 % of employees disabled	1.73%	1.55%	1.65%	1.78%	↑			Andrew Butler
100% of appraisals completed by 30 June 2009	17%	67%	81%	81%	=		It has been agreed that teaching and non-teaching staff appraisals will be reported separately in CYPF figures. Non teaching staff reported against cut off point of 30 June and teaching will be by 30 October.	Andrew Butler

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³ Due to inconsistencies in RAG-rating for this section in Q1, Q2 figures onwards have been RAG-ed centrally using a standard set of tolerances.

⁴ An upward arrow represents an improvement, not necessarily a greater figure; a downward arrow represents a worsening, not necessarily a lower figure

Corporate Core – People

Target	Q1 Performance	Q2 Performance ⁵	Q3 Performance	Q4 Performance	Trend ⁶	Risk	Commentary	Lead Officer
Deliver staff number reductions of 2.5%		Reduction of 3.01%	Increase of 2.19%	Increase of 2.41%	↓		Figures show difference in Full Time Equivalent (FTE) employed from the end of Q1 baseline.	
Average sickness days per Full Time Employee (FTE) - 7 days	5.33	6.01	NCI - available mid-Feb	8.18 (projected figure)	↓			Sue James
5% of employees BME	6.57%	7.31%	7.20%	6.9%	↓			Sue James
2.5% of employees disabled	1.26%	1.31%	1.74%	1.48 %	↓			Sue James
90% of appraisals completed by 30 June 2009	37%	80%	85%	85%	=			Sue James

⁵ Due to inconsistencies in RAG-rating for this section in Q1, Q2 figures onwards have been RAG-ed centrally using a standard set of tolerances.

⁶ An upward arrow represents an improvement, not necessarily a greater figure; a downward arrow represents a worsening, not necessarily a lower figure

Community Safety and Shared Services – People

Target	Q1 Performance	Q2 Performance ⁷	Q3 Performance	Q4 Performance	Trend ⁸	Risk	Commentary	Lead Officer
Deliver staff number reductions of 2.5%		Increase of 0.31%	Increase of 1.02%	Increase of 2.36%	↓		Figures show difference in Full Time Equivalent (FTE) employed from the end of Q1 baseline.	John Parry
Average sickness days per Full Time Employee (FTE) - 7 days	7.11	6.7	NCI - available mid-Feb	7.41 (Projected figure)	↓			John Parry
5% of employees BME	3.86%	5.67%	8.82%	5.29%	↓			John Parry
2.5% of employees disabled	1.19%	1.55%	1.48%	1.32%	↓			John Parry
90% of appraisals completed by 30 June 2009	38%	92%	90%+		=			John Parry

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⁷ Due to inconsistencies in RAG-rating for this section in Q1, Q2 figures onwards have been RAG-ed centrally using a standard set of tolerances.

⁸ An upward arrow represents an improvement, not necessarily a greater figure; a downward arrow represents a worsening, not necessarily a lower figure

Environment and Economy – People

Target	Q1 Performance	Q2 Performance ⁹	Q3 Performance	Q4 Performance	Trend ¹⁰	Risk	Commentary	Lead Officer
Deliver staff number reductions of 2.5%		Increase of 2.83%	Increase of 3.15%	Increase of 3.70%	↓		Figures show difference in Full Time Equivalent (FTE) employed from the end of Q1 baseline.	Nina Warren
Average sickness days per Full Time Employee (FTE) Less than 7 days = Corporate target (Less than 5 days = E&E)	0.87 days	1.03 days 1.9 days YTD	1.49 days 3.39 days YTD	NCI – available mid May				Nina Warren
5% of employees BME	2.58%	2.54%	2.55%	2.71%	↑		BME percentages are comparative to similar directorates in other authorities	Nina Warren
2.5% of employees disabled	1.13%	1.11%	1.12%	1.12%	=			Nina Warren
90% of appraisals completed by 30 June 2009	81%	82%	82% complete, 10% planned	82% complete, 10% planned	=			Nina Warren

⁹ Due to inconsistencies in RAG-rating for this section in Q1, Q2 figures onwards have been RAG-ed centrally using a standard set of tolerances.

¹⁰ An upward arrow represents an improvement, not necessarily a greater figure; a downward arrow represents a worsening, not necessarily a lower figure

Social and Community Services – People

Target	Q1 Performance	Q2 ¹¹ Performance	Q3 Performance	Q4 Performance	Trend ¹²	Risk	Commentary	Lead Officer
Deliver staff number reductions of 2.5%		Increase of 0.13% FTE	Increase of 0.50% FTE	Decrease of 0.02%	↑		Figures show difference in Full Time Equivalent (FTE) employed from the end of Q1 baseline.	John Jackson
Average sickness days per Full Time Employee (FTE) - 7 days	8.32	8.42	9.02	NCI – available mid May	↓		The principle that setting local targets for directorates has been agreed, with a local target of 9.5 days agreed for SCS, due to numbers of staff who have direct contact with vulnerable people.	Keiron Shortt
5% of employees BME	4.96%	4.98%	5.08%	5.06%	↓			John Jackson
2.5% of employees disabled	2.19%	2.09%	1.86%	2.03%	↑			John Jackson
90% of appraisals completed by 30 June 2009	52%	62%	70%	70%	=			Keiron Shortt

¹¹ Due to inconsistencies in RAG-rating for this section in Q1, Q2 figures onwards have been RAG-ed centrally using a standard set of tolerances.

¹² An upward arrow represents an improvement, not necessarily a greater figure; a downward arrow represents a worsening, not necessarily a lower figure

Division(s):

CABINET – 22 JUNE 2010

DIRECTOR OF PUBLIC HEALTH FOR OXFORDSHIRE ANNUAL REPORT IV

Report by Director of Public Health

Introduction

1. This is the fourth Annual Report by a Director of Public Health appointed jointly by local government and the NHS. This report attempts to build on the momentum generated by the first three which were generously received by a wide range of audiences.
2. This report aims to keep the spotlight firmly on the five main long term threats to public health by reporting on progress made in the last year and by making recommendations for next year. The main threats are:
 - Breaking the cycle of deprivation
 - An ageing population – the “demographic time bomb”
 - Mental health and wellbeing: avoiding a Cinderella service
 - The rising tide of obesity
 - Fighting killer infections
3. Sound progress is now being made to organise work across the county on these five areas.
4. It is now timely to emphasise two new threats which are emerging, namely those posed by dementia and alcohol abuse.
5. The threat posed by dementia is described within the chapter on an ageing population.
6. The threat posed by alcohol abuse is set out in a new chapter ‘Alcohol: What’s Your Poison’ making it the sixth current major threat to the public’s health.
7. Progress will be monitored in future reports. Long-term success will depend on achieving wide consensus across many organisations.
8. This report is designed to summarise the major health and wellbeing needs for Oxfordshire’s residents so as to influence the planning of public services, including Oxfordshire County Council’s, during 2010/11.

Main Headings

9. The attached report is arranged as follows:

Chapter 1: Progress Report for 2009/10

Chapter 2: Older People & the Demographic Timebomb (incorporating dementia)

Chapter 3: Breaking the Cycle of Deprivation

1. Children, Young People and Families
2. Focus on Banbury and Oxford
- 3.

Chapter 4: Mental Health in Adults

Chapter 5: The Rising Tide of Obesity

Chapter 6: Fighting Killer Diseases

Chapter 7: Alcohol: What's Your Poison?

10. **RECOMMENDATION**

The Cabinet is RECOMMENDED to approve and adopt the recommendations in the report.

JONATHAN McWILLIAM
Director of Public Health for Oxfordshire

Background papers: Nil

Contact Officer: Ruth Fenning, Tel: (01865) 336726

June 2010

**DIRECTOR OF
PUBLIC HEALTH
FOR OXFORDSHIRE**

**ANNUAL REPORT
IV**

***Reporting on 2009-2010
Recommendations for 2010-2011
Produced: May 2010***

SUMMARY

This is the fourth Annual Report by a Director of Public Health for Oxfordshire (jointly appointed by the NHS and the County Council). The recommendations are made for all organisations in Oxfordshire and for the public.

The aims are simple:

1. To report on progress made in the last year and set out challenges for the next year
2. To galvanise action on five main threats to the future health, wellbeing and prosperity of Oxfordshire
3. To add an emphasis on two strongly emerging threats, namely those posed by dementia and alcohol abuse.

The five main long-term threats are:

- Breaking the cycle of deprivation
- An ageing population – the “demographic time bomb”
- Mental health and wellbeing: avoiding a Cinderella service
- The rising tide of obesity
- Fighting killer infections

The threat posed by dementia is described in the chapter on an ageing population.

The threat posed by alcohol abuse takes its place as the sixth long-term threat to health.

Progress will be monitored in future reports. Your comments are welcome as long-term success will depend on achieving wide consensus across many organisations.

Please direct comments to: ruth.fenning@oxfordshirepct.nhs.uk

I hope you enjoy the report and act upon it.

Dr Jonathan McWilliam
Director of Public Health for Oxfordshire
May 2010

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INTRODUCTION

What is the purpose of a Director of Public Health's Annual Report?

The purpose of a Director of Public Health is to improve the health and wellbeing of the people of Oxfordshire. This is done by reporting publicly and independently on trends and gaps in the health and wellbeing of the population in Oxfordshire and by making recommendations for improvement to a wide range of organisations.

The role of the Director of Public Health is to be an independent advocate for the health of the people of Oxfordshire.

The Director of Public Health's Annual Report is the main way by which Directors of Public Health make their conclusions known to the public.

This is the fourth Annual Report by a Director of Public Health appointed jointly by local government and the NHS. This report attempts to build on the momentum generated by the first three which were generously received by a wide range of audiences.

What is the thrust of this particular Annual Report?

This report aims to keep the spotlight firmly on the five main long term threats to public health by reporting on progress made in the last year and by making recommendations for next year. The main threats are:

- Breaking the cycle of deprivation
- An ageing population – the “demographic time bomb”
- Mental health and wellbeing: avoiding a Cinderella service
- The rising tide of obesity
- Fighting killer infections

Sound progress is now being made across the county on these five areas.

It is now timely to emphasise two new threats which are emerging, namely those posed by dementia and alcohol abuse.

The threat posed by dementia is described within the chapter on an ageing population.

The threat posed by alcohol abuse is set out in a new chapter ‘Alcohol: What’s Your Poison’ making it the sixth current major threat to the public’s health.

Public Health – everyone’s business

Good health and wellbeing are not created in a vacuum. Good health is closely related to a wide range of factors such as employment, quality of neighbourhoods, quality of schools and having a part to play in society. These factors are, in turn, linked to issues of housing, skills and employment and all contribute to the general economic prosperity of the county. **In addition, to make a difference, it is necessary to focus on the same topics for a number of decades to make sustained change.**

For these reasons, the recommendations made in this report are long-term and wide-ranging and are not confined to traditional areas such as health services and social care.

The Contents of this Report

The first chapter takes an overview of general progress made during the last year.

The following six chapters concentrate on progress made on the six major threats. Recommendations for improvement are made at the end of each chapter.

Progress against recommendations will be reported each year and, in this way, this document has been designed as a tool to be used and built upon the year on year. I hope you enjoy it and act on it.

Dr Jonathan McWilliam
Director of Public Health for Oxfordshire
May 2010.

CHAPTER 1: Progress Report 2009/10: A Year In The Life Of The Public's Health

2009/10 was a momentous year for the public health of Oxfordshire. Among many other highlights, we tackled the flu pandemic, took active steps to tackle deprivation, completed work to give our immunisation systems a much-needed overhaul and made steady progress on all of the major threats to the public's health and wellbeing.

This chapter summarises gains made and areas of concern in improving public health and the areas of concern in Oxfordshire during the year 2009/10. It starts with the gains and then describes the concerns.

Evidence of Gains in the Public's Health

The Battleships are lining up!

Previous reports have stressed the fact that all of the major threats to the public's health require joined-up action by statutory agencies because **no one organisation can do it alone**. This has been likened to lining up battleships so that all move in a single direction as a single fleet against a common enemy.

Reviewing evidence of progress made over the last 3 years shows clearly that this is happening. In particular, gains have been made over the past year on work to help older people and the mentally ill as well as tackling long term problems such as deprivation and dementia. This is encouraging. It will take more years of determined perseverance to make a lasting difference, but gains can clearly be seen and are noted throughout this report. The challenge now is to keep this focus, develop clear action plans and define clear milestones so that we can measure our progress en route to long term success.

The Swine Flu Pandemic

It may seem strange to see the flu pandemic as a gain, given the suffering caused. There were, however, undeniable gains made in our ability to get organised to fight major public health threats. For example, we now know our emergency plans work; we now know how to run national call centres in health emergencies and we now know how to run mass vaccination programmes. All these things are significant gains. The flu pandemic forced the grasping of many nettles at national level with good success. This is to all our benefit. More detail is given in chapter 6.

Immunisation of children continues to improve

During the year the proportion of children vaccinated against serious infections continued to rise, with Oxfordshire's rates some of the best in the country. For example, for children aged two, most vaccination rates in the county were among the top 20 in England (out of 152 Primary Care Trusts), with over 9 in 10 children immunised. The increase in rates has been helped by significant improvements in the way data are collected so that individual children who miss their injections can be followed up more easily. For most vaccinations it is important to reach as many people as possible to reduce the risk of the infection spreading in the community.

Bowel Screening

Bowel Screening began in Oxfordshire. A service for residents living around the Horton General Hospital became operational in January 2010, followed by the rest of the County in April 2010.

About one in 20 people in the UK will develop bowel cancer during their lifetime. It is the third most common cancer in the UK, and the second leading cause of cancer deaths. In Oxfordshire around 93 new cases are diagnosed each year in 60-69 year olds. Regular

bowel cancer screening has been shown to reduce the risk of dying from bowel cancer by 16%.

The programme offers screening every two years to all men and women aged 60 to 69 with 40,918 people in Oxfordshire due for screening between 22/01/2010 and 21/01/2012.

Screening consists in the first instance of a postal test kit for blood in the stool. Around 98 in 100 people will receive a normal result and will need no further investigation. Around 2 in 100 people will receive an abnormal result. They will be referred for further investigation and usually be offered a detailed examination of the large bowel using a flexible hi-tech camera (colonoscopy).

Superbugs in decline

Methicillin Resistant Staphylococcus Aureus (MRSA) infections of the bloodstream continued to fall. Over the last 3 years the number of cases fell from 50 cases, to 43 cases, to 32 cases. During the year, people going to hospital for surgery have had their skin tested for MRSA before admission. If MRSA was found, people were given an antibacterial wash to get rid of the bugs. This has helped bring the number of cases down. Tightening up on the use of catheters has also helped.

Infections caused by *Clostridium difficile* (*C.diff*) have also reduced dramatically with 325 fewer cases occurring in 2009/10 compared to 2007/08. (2007/08 826 cases; 2008/09 533 cases; 09/10 500 cases) This has been brought about by improving antibiotic prescribing, improving the speed of isolation of suspected cases and improved cleanliness in hospitals.

More pregnant women say 'I quit'

Giving up smoking is the single best thing you can do for your health. The Oxfordshire Smoking Advice Service has strengthened its service to pregnant women to good effect. A specialist now provides intensive one-to-one support for pregnant smokers and their partners. Support continues throughout the pregnancy and up to six months after the baby is born. Alternatively pregnant smokers can access NHS stop smoking services in GP practices, Children's Centres and some pharmacies. In addition a weekly stop smoking clinic is held at the Horton Hospital in Banbury. Details are given in chapter 3.

Praise from the (former) Home Secretary for work to reduce alcohol related harm.

The use of information from the Emergency Department in the John Radcliffe to help police and others to reduce City Centre violence won plaudits from the former Home Secretary in a visit to Oxford in February 2010. Alan Johnson praised the strength of partnership work and commended Oxfordshire as a national leader. Information on where and when people get injured in fights or accidents is now collected alongside Ambulance pick-up data and crime statistics to help action planning. Direct results have included closure of some pubs and clubs or changes to licensing conditions requiring drinks to be served in plastic glasses. Taxi queues are now marshalled at particular times to prevent flare-ups. There was also extra praise for work done in following up people who had been injured when drunk – an effective way of helping them to change their behaviour and prevent repeat incidents

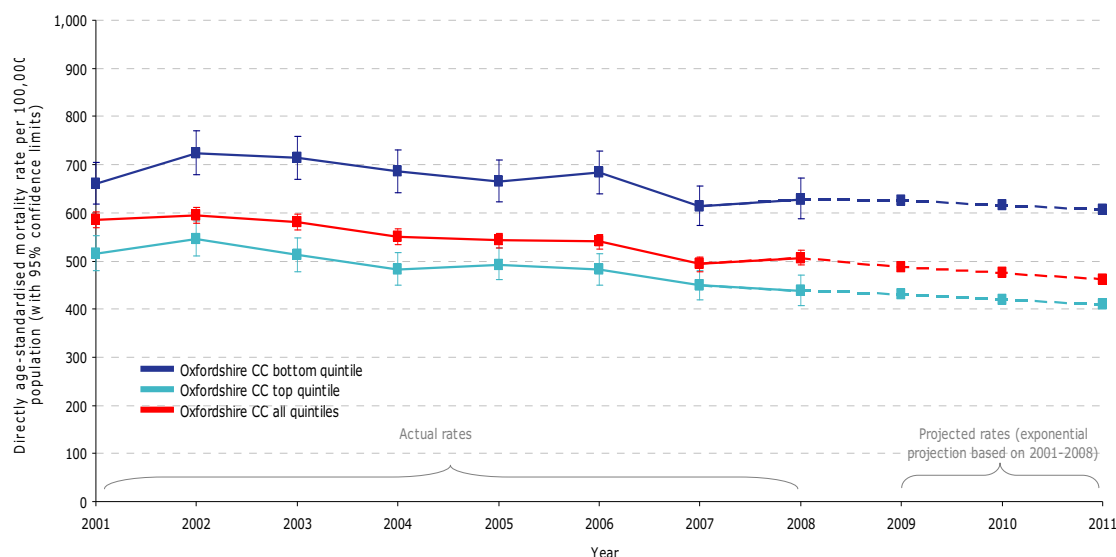
'6 Chiefs' fight deprivation in Banbury and Oxford

The Chief Executives of Oxfordshire County Council, Oxford City Council, Cherwell District Council, Oxfordshire PCT, Thames Valley Police (Oxfordshire) and Oxford and Cherwell Valley Colleges joined together to find a lasting way to tackle deprivation in small areas of Banbury and Oxford (see Chapter 3). The work will include a focus on helping families with young children to get a better start in life. The initiative was awarded £1 million of grant money to kick start the work..... but there is a long way to go and final success will take years rather than months.

The Inequality Gap widens slightly

Each year we measure what we call the inequality gap in Oxfordshire. The graph below compares death rates in the populations who live in the most deprived 20% of localities in Oxfordshire with those who live in the least deprived 20% (i.e. roughly the best and worst off).

Figure 1.1: Trend in all-age, all-cause mortality rates for Oxfordshire CC most and least deprived quintiles of Lower Super Output Areas, 2001-8 (actual) and 2009-11 (projected)



The solid top line on the chart shows the trend in death rates for the worst off up to the end of 2008. The dotted line predicts what might happen in the future. Overall death rates for this group are falling, though in the last year there was a slight upturn.

The bottom line on the chart shows the trend in death rates for the best off 20% of areas. Here too you can see a general reduction in death rates, and these continued to fall in 2008.

The middle line on the graph shows the average for the whole County.

The gap between the top and bottom lines is the 'inequality gap' and we can see that this latest data shows that, **the inequality gap in Oxfordshire widened**. This data is limited as it only reflects the position 18 months ago. It may be a 'blip' and the measures put in place during the last year may improve the situation, but we need to continue to monitor these trends vigilantly.

Rates of cervical screening in younger women are too low

Cervical screening is an effective way of detecting and treating cancers of the womb neck at an early stage, significantly reducing the chance of illness and death among women taking part in the programme. Although the overall uptake rate for women eligible for cervical screening – around 4 in 5 women (80%) – is satisfactory, the rate in women aged 25-49 is around 10 per cent lower. We are working hard to raise awareness of the benefits of screening in this age group, to reduce women's risk of developing cervical cancer in the county.

Childhood Obesity is on the increase

Data collected on Oxfordshire's schoolchildren showed that the 2009 cohort of children is more overweight and obese than 2008's cohort. The data shows a significant rise in reception age children being overweight and obese compared to 2008 Oxfordshire data. This is also the first time that our local data has been worse than the national figures. The detail is given in chapter 3 and the proposed action is in the chapter 5 which is dedicated to the topic of obesity.

CHAPTER 2: Older People and the Demographic Time Bomb

What is the Issue and Why Does It Matter?

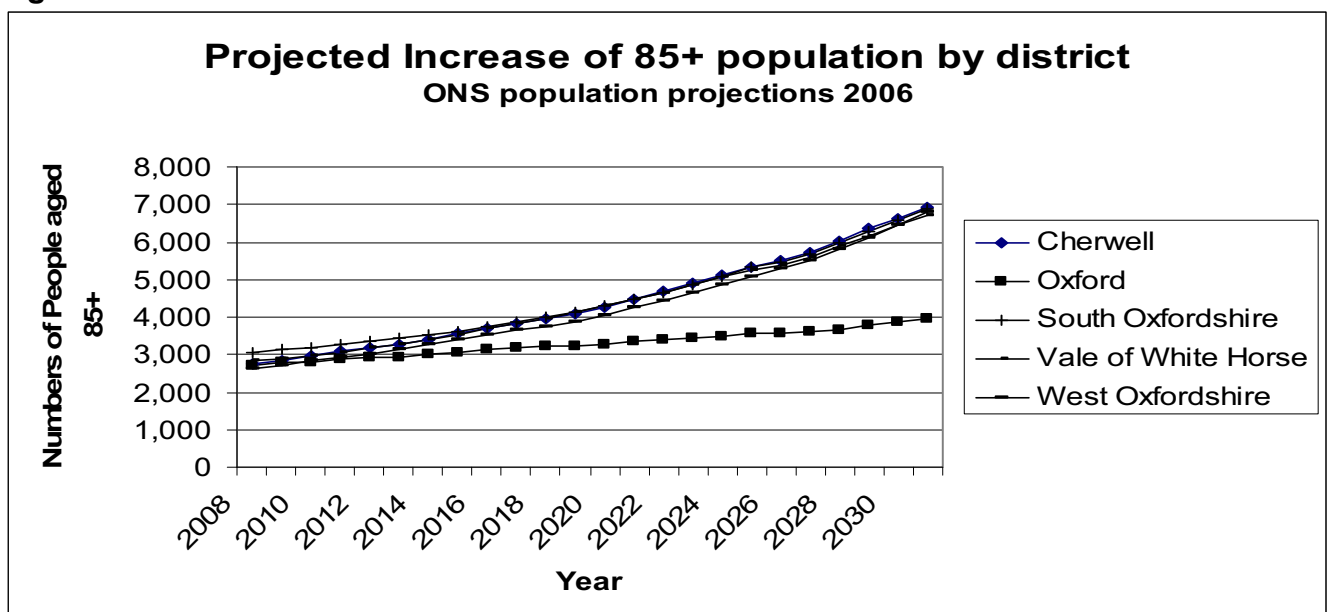
The growth in the number of older people in Oxfordshire is now universally accepted as one of the major challenges to the wellbeing of this county.

The reasons for this are well worth repeating. They are:

- The number of older people is increasing, particularly over 85s.
- The proportion of older people in the population is increasing. The working population will be increasingly stretched to fund public services for the retired.
- The increase will be uneven across the county. By 2029 people aged 85+ will increase in number by around 150% in Cherwell, Vale and West Oxfordshire, by around 125% in South Oxfordshire and by around 70% in Oxford City. This is an example of an inequality that hits rural areas hardest.
- The impact on services will be severe. The current range of services we provide will simply not be affordable.
- Because the proportion of younger people in Britain is falling compared with older people, demand for informal care for older people is predicted to exceed supply within the next ten years – by 2017.
- **There is increasing concern at both national and local levels about the challenges posed by the growing number of people with dementia in an ageing population. The issues are set out in a separate section within this chapter.**

The effect of the ‘timebomb’ is illustrated in the graph below. It shows the rise in the numbers of people aged 85 and over in the 5 Districts of Oxfordshire. The number of people in this age group more than doubles over the 22 years from 2008 to 2030, by around 4,000 people in four out of five Districts in Oxfordshire. It is noteworthy that the effect is much less pronounced in the city because of its younger overall age profile. The increase here is around 1,000 people.

Figure 2.1:



What recommendations were made last year?

The thrust of last year's report was to recommend that:

- A clear map of services should be produced setting out a clear direction forward for older people. **This has been achieved.**
- Preventative work for older people should be grouped together. **This is being achieved.**
- Clear outcome measures should be identified. **This has not yet been achieved but has begun.**
- A senior, dedicated, joint commissioner for older people and healthy ageing should be appointed. **This has been achieved.**
- Carers should be actively supported, particularly by the NHS. **A good start has been made.**

Older People: Progress

This section will cover overall progress followed by a report on support for carers and then a new section on dementia.

A. Overall progress made

OPINION: Good progress has been made in grouping and organising work for older people across the County, given the huge size of the task. We have done well to include younger age groups in an all-embracing healthy ageing strategy. The strategy needs to be tightened, process and outcome measures identified and clear action plans implemented which will make a difference for older people on the ground.

The good progress made over the last year is tempered by the growing realisation of the sheer size and complexity of older peoples' issues in the County. During the year the decision was made to tackle the whole topic of "ageing successfully". In effect this means it has been decided to include preventative work for people in their 40s and 50s and 60s. This is the right decision to make so that problems are prevented in later years, but it does increase the scope and scale of what has been taken on. Preventative work in this context means helping people with chronic disease to stay well as well as more traditional preventative work around exercise, diet and smoking.

A single long-term strategy called "Ageing Successfully" has been produced and is undergoing consultation having been agreed by the Health and Well-Being Partnership Board. The strategy is broad and ambitious in scale, ranging from prevention through to end-of-life care and also includes vitally important issues for well-being such as housing and transport. **This is the first time this has been achieved in Oxfordshire.**

Overall progress is good but more now remains to be done. We need in particular to have a clear sense of where we are going. This can be achieved through defining clear results to be achieved in the future (outcome measures) and also by defining clear milestones along the way so that we know we are going in the right direction (process measures). This work has begun, and needs to be completed during the next year.

Better organisation of existing work across agencies brings some of the 'first fruits' of partnership working to early ripeness. There are numerous examples of this across the County, two of which are given below.

- **Falls** are common in older people, particularly those who are taking a mixture of medications and who have eyesight problems. Oxfordshire is acknowledged as having one of the leading Falls Prevention services in England. Improvements have recently been made to improve services for people who have fractures from falls in the John Radcliffe Hospital.
- We now have an improved "pathway of care" for **people who have had a stroke**. The pathway joins up all aspects of care, including prevention, care by people themselves, home care, GP services, community services, specialist hospital services and community hospital services. There has also been investment in rehabilitation in the community. As a result more people are being treated in services dedicated to those who have had strokes.

B. Caring for our carers

Most people prefer to be cared for by their family or other informal carers as this is often the highest quality of individual care that can be given. This type of care is continuing to shore up health and social care services. We will rely increasingly on informal care as the population ages.

In last year's report the need for Oxfordshire PCT to take a more strategic approach to supporting informal carers was recognised. There were three main areas for action:

- Strengthening the GP's role in identifying carers and championing their needs. **This was partly achieved.**
- Identifying current money spent and investment over time in support of carers in the NHS. **This was partly achieved.**
- Strengthening the NHS contribution to the Joint Carer's Strategy. **This has been achieved.**

Progress in detail:

OPINION: Since the need to care for our carers was identified as a major issue last year a good start has been made. There is much still to do but we are now on the right track. We need to build on this.

The thrust of last year's recommendations was to improve the NHS contribution to work on carers to bring this up to the level of the work of Local Authorities. This is now being achieved. In particular:

- (i) Oxfordshire PCT increased the budget available for support to Carers by £250,000 from 2009-10. This money has been invested in:
 - Local implementation of the National Carers Strategy,
 - Piloting the prescription of carers' breaks by GPs
 - Commissioning training programmes to make the task of caring easier and to help carers find the support they need more readily.

In addition:

- (ii) A document called "The Carers' Protocol for Primary Care" has been revised and distributed to general practices. This sets out expectations for best practice and enables primary care teams to make this part of what they do.
- (iii) 6,800 people are now known to their GPs as Carers and can therefore be offered services such as an annual health check. However, there are an estimated 60,000 carers in the county so there is still a long way to go.
- (iv) A contract is in place with an organisation called "Rethink" for running support services for carers of people with mental health problems.
- (v) The PCT now has a high quality Carers Action Plan 2009-2012 which was agreed by the PCT Board in April 2009. This dovetails with the Oxfordshire Carers Strategy which sets out the partnership approach across the county.

C. The Growing Threat of Dementia

What is dementia?

Dementia is not a single illness. It is a group of symptoms caused by specific brain disorders. The most common cause is Alzheimer's disease, but dementia can also be the result of a stroke or mini-strokes.

Dementia is progressive – the symptoms will get worse over time. Although there is no cure, treatments can slow the progression of the disease, and there are ways of helping to keep it manageable.

What is the issue?

Dementia presents a huge challenge to society, both now and increasingly in the future. There are currently 700,000 people living with dementia in the UK. Dementia costs the UK economy £17 billion a year and in the next 30 years the number of people with dementia in the UK will double to 1.4 million, with the costs predicted to treble to over £50 billion a year.

Dementia is therefore a demographic timebomb within a demographic timebomb

In addition, recent national reports and research have highlighted the shortcomings in the current provision of dementia services in the UK.

While the numbers and the costs are daunting, the impact on individuals with the illness and on their families is profound. Dementia results in a progressive decline in multiple areas of function, including memory, reasoning, communication skills and the skills needed to carry out daily activities. Alongside this decline, individuals may develop behavioural and psychological symptoms such as depression, psychosis, aggression and wandering, which complicate care and can occur at any stage of the illness. Carers of people with dementia are often old and frail themselves, with high levels of depression and physical illness and a diminished quality of life. Dementia is a terminal condition but people can live with it for many years after diagnosis.

What is the position in Oxfordshire?

The estimated number of people with dementia in Oxfordshire is almost 7,000. The Oxfordshire Older People's Health Needs Assessment (2007) showed a total of 2,400 people with a definitive diagnosis of dementia recorded by Oxfordshire GPs in 2007. This is in line with the national estimate of between only 20% and 40% of people affected by dementia receiving a diagnosis.

The estimated number of people with dementia by Local Authority in Oxfordshire is set out in the table below alongside the percentage increase expected by 2016. Overall, an increase of around 20% is expected over ten years.

Again, this is an issue which will have the greatest impact on more rural parts of the county.

Table 2:1: Predicted prevalence of dementia in Oxfordshire, 2007 and 2016

(Source: POPPI & PANSI data systems)

Local Authority	People aged Over 65 estimated to have dementia in 2007, showing current numbers and predicted % increase by 2016
Oxfordshire	6,828 to increase by 19.3%
Oxford City	1,249 to increase by 4.1%
Cherwell	1,376 to increase by 24.1%
South Oxfordshire	1,496 to increase by 20.8%
Vale of White Horse	1,391 to increase by 23.1%
West Oxfordshire	1,316 to increase by 23%

Dementia is also the second largest contributor in the county to lengthening a hospital stay. Recently discharged patients with dementia also manage more poorly in the community and are more commonly readmitted than patients discharged with any other condition.

Progress in detail

OPINION: Dementia is an important topic. A good start has been made. The Dementia Strategy and individual projects now need to become part of mainstream work on older people.

Nationally

The National Dementia Strategy was published on the 3rd February 2009. It aims to provide a framework which can be adapted locally. In effect it improves awareness and services for dementia by grouping all the issues together in one place and recommending good practice.

The national strategy identifies 17 objectives to improve dementia services, which have been grouped into three broad themes:

- Raising awareness
- Early diagnosis
- Living well with dementia

Locally

In Oxfordshire, the 17 objectives of the National Strategy have been grouped into 5 work streams with a number of programmes and projects being delivered within each. The work streams include:

1. Improved quality of life for people with dementia and their carers
2. Early diagnosis and complex care
3. Early onset dementia – Including learning disability and alcohol related dementia
4. Provision of information
5. Making change happen

Local progress in detail:

- A draft Dementia commissioning strategy has been written and a Dementia Development and Implementation Board has been set up to make the strategy a reality.
- From May 2010 a programme of support and training for carers of people with dementia will be put in place. Carers will have a choice of 3 training courses or a one-off payment to support their needs.
- Specific services designed to help people with memory problems are well established in Oxfordshire but two different models co-exist. Work is underway to develop a single system.
- Oxfordshire is one of the Demonstrator Sites for a Dementia Advisory service. To date, four Dementia Advisors have been recruited by the County Council and are linked to specific GP surgeries to provide an 'information prescription' to patients who are newly diagnosed. Dementia advisors will also signpost people to support services. Following this Dementia Advisors from the voluntary sector will be recruited.
- A national campaign will be implemented, aimed at improving public and professional awareness and understanding of dementia. This will begin in March 2010.
- The 'Careforce Oxfordshire' project has been established to ensure that all staff working with people with dementia receive specific training, both as part of basic training and as ongoing professional development.

Recommendations

Recommendation 1

By December 2010 the Ageing Successfully strategy should be completed with agreed overall direction and clear outcome measures, process measures and action plans, through the PCT Director of Service Redesign and County Council Director for Social and Community Services.

These outcome measures and process measures should be monitored vigorously by the Health and Wellbeing Partnership Board.

The Oxfordshire Health Overview and Scrutiny Committee should also consider scrutinising progress made as part of its annual plan.

Recommendation 2

By December 2010 Oxfordshire PCT, through its Director of Public Health, should have identified 20% more carers in primary care.

Recommendation 3

Work on Dementia in Oxfordshire should be formalised in a joint strategy, led by Oxfordshire PCT and Oxfordshire County Council through their Directors of Service Redesign and Director of Social and Community Services. It should include on the identification of people with dementia and support of carers for people with dementia. It should contain clear outcome measures, process measures and a clear timescale for implementation. This strategy should be completed by March 2011 and should be monitored vigorously by the Health and Wellbeing Partnership Board.

The Oxfordshire Health Overview and Scrutiny Committee should also consider scrutinising progress made as part of its annual plan.

CHAPTER 3: Breaking the Cycle of Deprivation

What is the Issue and Why Does It Matter?

We are now tackling areas of stubborn inequality in this county, where poor life prospects and poor health have been handed down from one generation to the next. This has been recognised as an important priority for Oxfordshire's public services, and work to tackle this problem has begun in earnest and is showing promise, although the final results will take time to show through in the data we collect.

The statistics show that there are specific areas of the County which experience poor school attainment, excessive ill health, higher crime rates, higher levels of teenage pregnancy, higher unemployment and, ultimately, an early death. There is also early evidence from across the country that the impact of the recession is falling most heavily in these areas, particularly through unemployment rates. This is how the cycle of deprivation perpetuates itself and underlines the fact that long term resolve will be needed break the cycle.

Paying for these problems through additional public services adds to the drain on the public purse for the whole county: **This is an issue of concern for everyone.**

Tackling the Issues: The Oxfordshire Approach

We have agreed to tackle this problem on two fronts

1. **A countywide approach to breaking the cycle of deprivation in children, young people and families** led by the Children's Trust, focusing on Banbury, Oxford City, Abingdon/Berinsfield and smaller rural areas.
2. **A specific focus on the most deprived wards of Oxford and Banbury covering all age groups**, involving all organisations and led by the Oxfordshire Partnership (the partnership-of-partnerships where community leaders meet to create an overall strategic plan for Oxfordshire).

This chapter reports on progress and makes recommendations for each of these two topics in turn.

1. Breaking the Cycle of Deprivation in Children, Young People and Families

The issue

Over the last 3 years the need to break the cycle of deprivation in this County has been well recognised.

What recommendations were made last year?

- That the existing work on 'deprivation and narrowing the gap' should be drawn into a single comprehensive workstream. **This has been achieved.**
- That commissioning of children's services should be drawn together more tightly within Children's Trust arrangements. **Good progress has been made.**
- That work to encourage breastfeeding should improve and that the inequality gap between wards with the highest and lowest rates should be reduced. **Improved services are in place and modest progress has been made to narrow the inequality gap.**

Progress made in detail

OPINION: Breaking the cycle of deprivation in children, young people and families is now firmly mainstream business for organisations in Oxfordshire. New determination is evident and the new joint plans are the best yet. Outcome measures have not yet improved as this will take a number of years to achieve. We should focus on developing 'process measures' to make sure we are achieving steady progress towards the ultimate goal.

This work has now entered a transitional phase; the statistics below show that we have not yet broken the cycle of deprivation, but on the other hand current work shows that we are en route. This is evidenced by a palpable new determination to tackle these issues at root, evidenced as follows:

- The production of a new Children and Young Peoples' Plan containing a major section on tackling inequalities called 'Minding the Gap', demonstrating the commitment of the Children and Young People's Trust to tackle these issues.
- The personal commitment of the Leader of Oxfordshire County Council to improve educational attainment results and to reduce the number of people who are not in employment, education or training (NEETS) as stated at the Oxfordshire Partnership and Council meetings.
- The personal commitment of the Deputy Leader of the County council to improve educational attainment results as stated at the Public Services Board
- A number of targeted initiatives cited in this report which focus selectively on areas of longstanding social deprivation in this county.
- The '6 Chiefs' initiative in Banbury and Oxford described later in this chapter- this work contains a strong commitment to help those families who are worse off.
- The appointment of a new Director for Children, Young People and Families in the County Council committed to resolve these issues through partnership working led by the Children's Trust.

Examples of good progress made in more detail are:

1. A revised Oxfordshire Children and Young People's Plan 2010 – 2013 was published in January 2010 and it is heartening to see that Narrowing the Gap for our most disadvantaged and vulnerable groups is one of only 3 strategic priorities for Oxfordshire Children's Trust.
2. The Children's Trust commissioning subgroup has focused on improving services for some of the county's most vulnerable children and young people including children with disabilities and young people who abuse drugs and/or alcohol.
3. Three Area Trust Boards have been established and are being developed to drive forward actions to deliver the priorities in the Children and Young People's Plan based on local information and needs.
4. Breaking the Cycle of deprivation is a strategic priority in the PCT Operational Plan and a detailed programme of work is in place for 2010-2011.
5. A new community-based infant feeding support service has begun which will deliver intensive support in the first 2 weeks of life to women living in areas with the lowest breast feeding initiation and duration rates.

The facts about children in Oxfordshire

Measure 1: Child Poverty.

National data has not been updated on this measure since 2007 and it is therefore inappropriate to report on it. Further data will come from the 2011 census. The findings were that overall the county ranks highly for child well being, BUT there was wide variation across the county with Oxford City in the bottom third of all districts. 10 wards were among the 10% most deprived wards in the country, 9 of which were in Oxford and one in Banbury.

Measure 2 Teenage pregnancy and sexual health

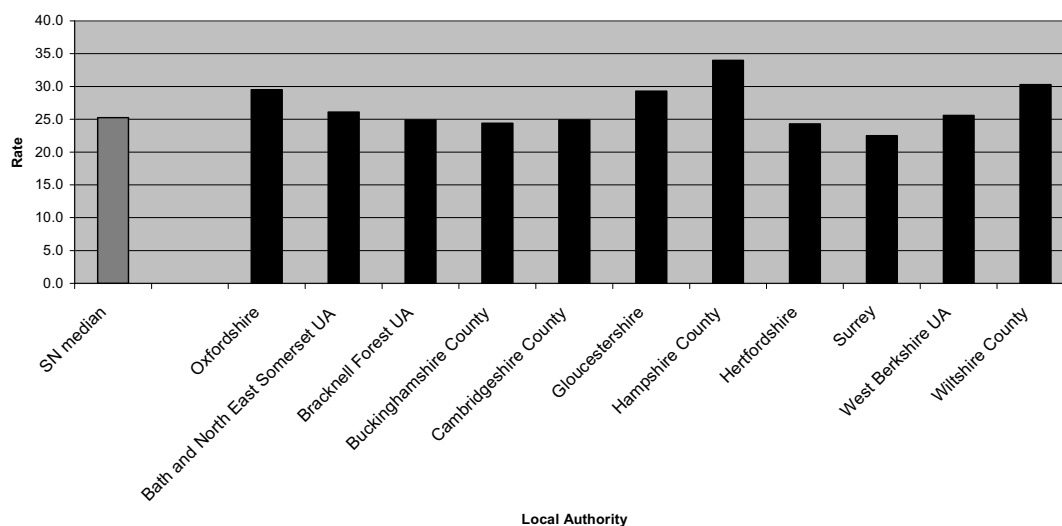
It is appropriate to take a different approach to teenage pregnancy targets this year. The national way of measuring teenage pregnancy is not very satisfactory as it only measures how fast the number of pregnancies falls. This also tends to hide the real problem as follows:

As a largely affluent county, Oxfordshire's teenage pregnancy rates are among the lowest in the country and so on the whole we do well (currently we are 19th best in the country). However there is considerable variation across the county with some small areas having persistently high rates. We have 18 wards in the county which have teenage pregnancy rates in the highest 20% in England. Of these, 13 wards are in Banbury and Oxford and the solution has to lie in targeting those small areas with the highest rates - and this is what we are doing. There is evidence that **focused work in deprived parts of Oxford over the last 5 years is now working well, and the overall teenage pregnancy rate in Oxford (though still higher than other Districts) is falling year on year.**

A comparison with Local Authorities which are similar in terms of size and demographics shows that there is still room for improvement. All of these Local Authorities are near the top of the class nationally. (These are called in the jargon our 'Statistical Neighbours'). The following chart shows that Oxfordshire does better than Hampshire and Wiltshire but can still do more to catch the likes of Buckinghamshire and Surrey, although there are some question marks about whether the comparison is totally fair given lower levels of deprivation in Buckinghamshire.

Figure 3.1:

Oxfordshire Teenage Conceptions Statistical Neighbour Comparison 2008 (rate of conceptions per 1000 women aged 15 - 17 years)



During October 2009 Oxfordshire Children and Young People’s Trust reviewed and revamped its plans for teenage pregnancy. Much good practice was found and new services were put in place to target some of our most vulnerable young people at highest risk of becoming pregnant. For example:

- Since 2008 we have made significant investment in health visitors and school health nurse services. We have increased the number of school health nurses working in teenage pregnancy hotspots in Oxford and Banbury. As a result, a school health nurse is available 52 weeks a year in person or on the phone.
- A special service was commissioned to provide advice and support to under-18s following the birth of their baby or after a termination of pregnancy. The service also works closely the Youth Offending Service and Social Services to offer 1 to 1 support for young people at high risk of becoming pregnant
- In January 2010, a home visiting programme began targeting first time mothers aged under 20. This service will be offered to 100 families living in Oxford and Banbury. Specially trained nurses visit young families starting during pregnancy and continuing until the child is aged 2 years.

Measure 3: Breastfeeding

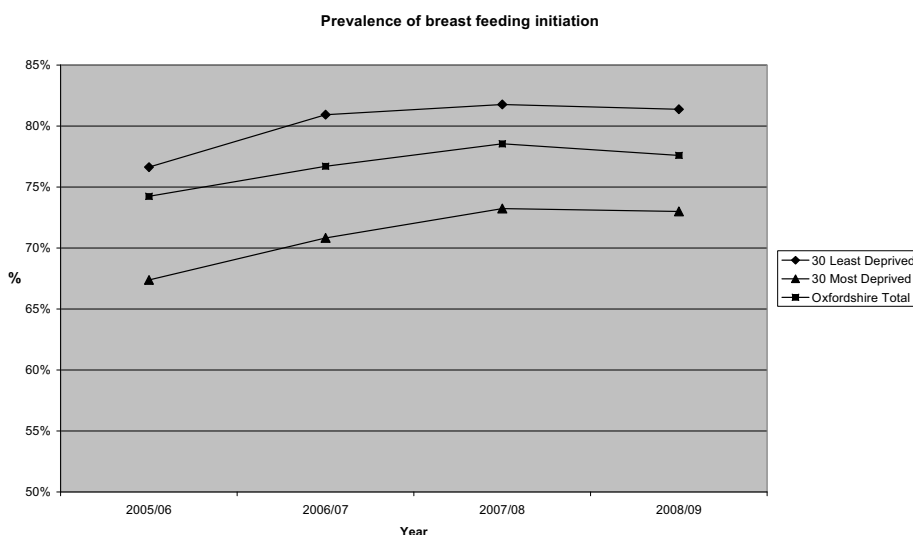
Breastfeeding is one of the best ways of getting a healthy start in life. It provides the perfect food for babies and protects against disease and obesity in later life.

The data shows that we have had some modest success in narrowing the gap in initiating breastfeeding between our most deprived and our least deprived wards since 2006/07- but we need to do more. This was a requirement of last year’s report. The ‘gap’ can be seen as the distance between the top and bottom lines of the graph below. **The really good news is that all of the rates are steadily climbing which is a gain for the public’s health long term.**

Despite this we know that in some wards, particularly in Banbury, less than half of mothers choose to breast feed their baby.

Overall in Oxfordshire around 80% mothers choose to breast feed their baby. By the age of 6-8 weeks less than half of all babies are fully breastfed. To address this gap a new community Infant feeding service was commissioned, with the aim of providing intensive support to women during the vital first 2 weeks when long term breastfeeding is established. The service will be delivered in Oxford and Banbury in communities where we know breast feeding rates are particularly low.

Figure 3.2:

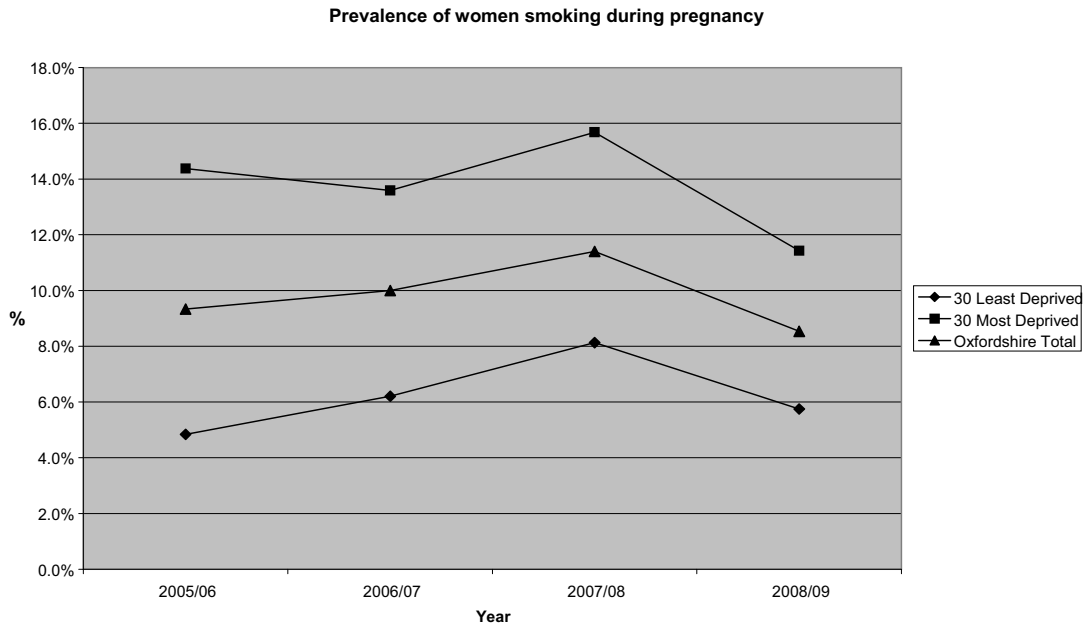


Measure 4: Smoking in pregnancy

Following a concerted effort from our smoking cessation service the percentage of pregnant women who smoke has fallen during the year, reversing the trend of the previous two years. **This is a good achievement.**

Because of careful targeting, the gap between those best and worst off in the county has narrowed, making 2009/10 a doubly successful year. The proportion of women living in deprived wards who smoke throughout their pregnancy is still roughly double those in better off areas (around 6% vs. around 12%). The graph below shows trends over the last 4 years in Oxfordshire.

Figure 3.3:

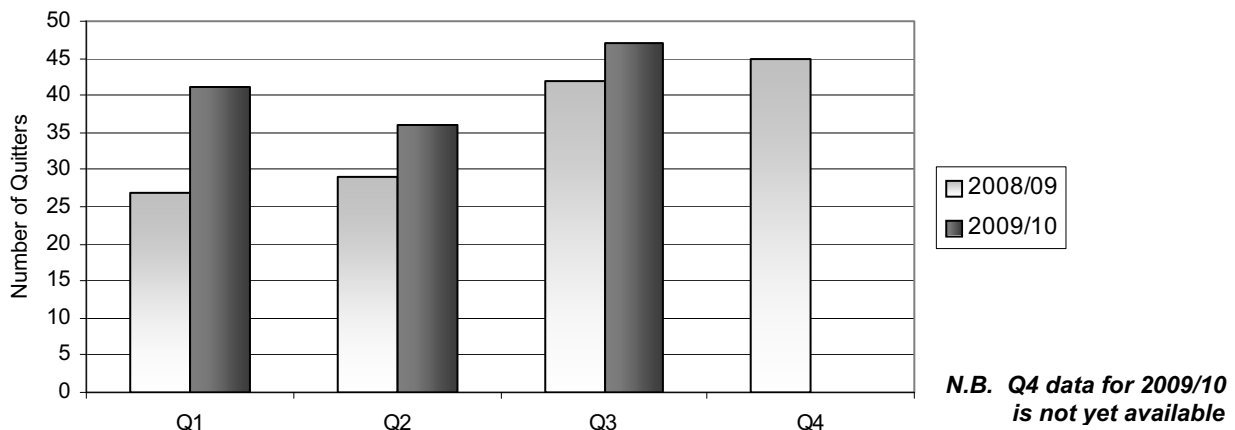


In England as a whole, the number of women smoking in pregnancy was 14.4% in 2008/09.

Additional stop-smoking services for pregnant women were described in chapter 1.

The Chart below compares the last two years, quarter by quarter and shows the increased number of smoking quitters achieved last year. Around 25 additional pregnant women were helped to stop smoking in the first 9 months of the year, compared with the previous year.

Figure 3.4: Pregnant Four Week Smoking Quitters



Measure 5: Obesity

We are continuing to improve our local data on childhood obesity through the National Child Measurement Programme. This year we weighed and measured 11,256 children in Oxfordshire.

The stark fact is that the 2009 cohort of Oxfordshire children are more overweight and obese than 2008's cohort. Data collected in 2009 shows a significant rise in reception age children being overweight and obese compared to 2008 data. This is also the first time that our local data is worse than the national figures.

This is a clear signal that we need to get 'back to basics' in terms of preventing obesity. This theme is elaborated in chapter 5.

Figure 3.5

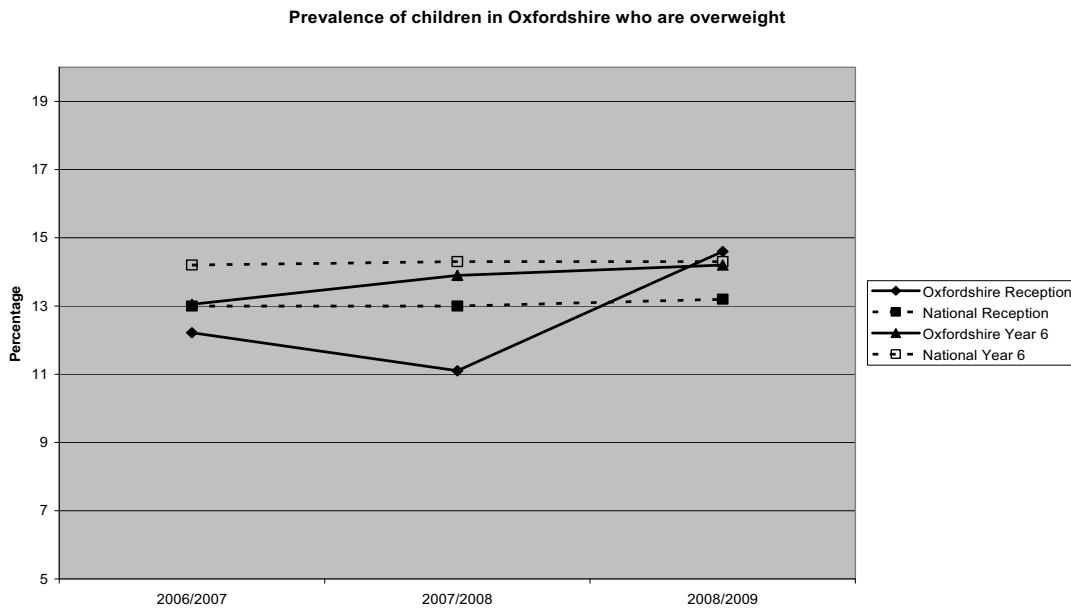
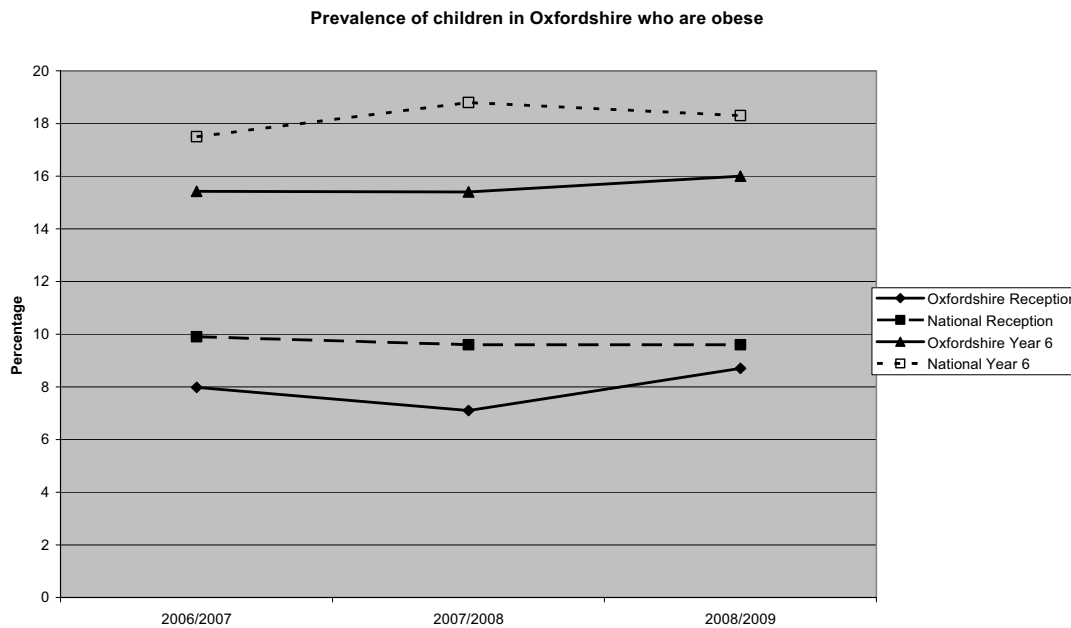


Figure 3.6



Measure 6: GCSE Attainment

It is important that educational attainment is carefully monitored each year.

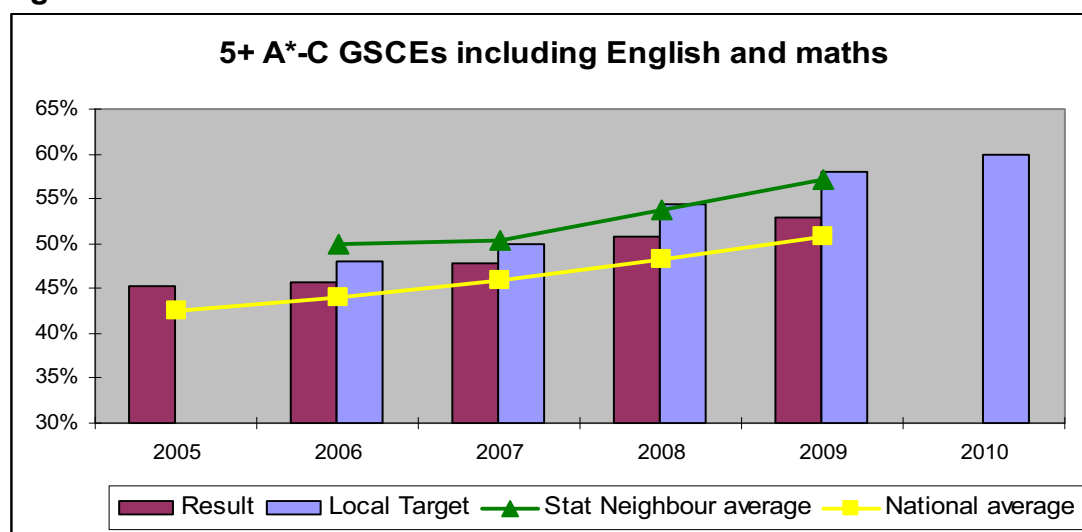
Educational attainment is a useful summary indicator of underlying problems in a society. All organisations have some responsibility for remedying this situation as educational attainment is a product of many family and social factors as well as the quality of our schools.

In this section the key performance measure used is a National Indicator called NI 75 which measures the percentage of Year 11 pupils achieving 5 A-star to C grades including English and Maths at GCSE (5 GCSEs A*-C inc English and Maths).

a. Overall attainment compared with national results

The percentage of children in year 11 achieving 5A*-Cs including English and Maths in Oxfordshire has improved consistently since 2005 to 52.9% in 2009. In 2009 Oxfordshire's results were 2.2% above the national average for maintained schools, a slight decrease on 2008. However, performance still remains below the local target of 58% and is lower than similar Local Authorities shown by the top line on the graph below. Despite the improved results therefore, this indicator remains a cause for concern and is a priority for the County Council and partners. A comprehensive set of actions is in place to remedy the situation.

Figure 3.7



	2005	2006	2007	2008	2009	2010
Oxfordshire	45.3%	45.6%	47.9%	50.7%	52.9%	
Local Target		48.0%	50.0%	54.3%	58.0%	60.0%
Statistical Neighbour average		50.0%	50.4%	53.7%	57.1%	
National average	42.6%	44.1%	45.9%	48.3%	50.7%	

Source: DCSF statistical first releases Dec 2009

b. Comparison with statistical neighbours

This information allows us to benchmark the attainment of our young people against similar local authorities. The data shows that Oxfordshire performs below its statistical neighbours. The percentage of Oxfordshire children gaining 5A*-Cs including English and Maths was 4.4% lower than the average score of statistical neighbours in 2006. The

Oxfordshire average improved to be only 2.5% lower than statistical neighbours in 2007 but the gap has widened again to 4.2% in 2009 and remains a cause for concern.

c. Inequalities in attainment between schools.

In 2009, all 32 maintained secondary schools in Oxfordshire reached the government's 'floor target', which requires at least 30% of a school's Key Stage 4 pupils to attain 5 A*-C GCSEs including English and Maths.

The range of pupils achieving 5 or more GCSEs A*-C including English and Maths in 2009 varied widely across the county, from Matthew Arnold School (70%), Bartholomew School (66%) and Gillotts School (65%), to Oxford School (35%), North Oxfordshire Academy (25%) and Oxford Academy (18%).

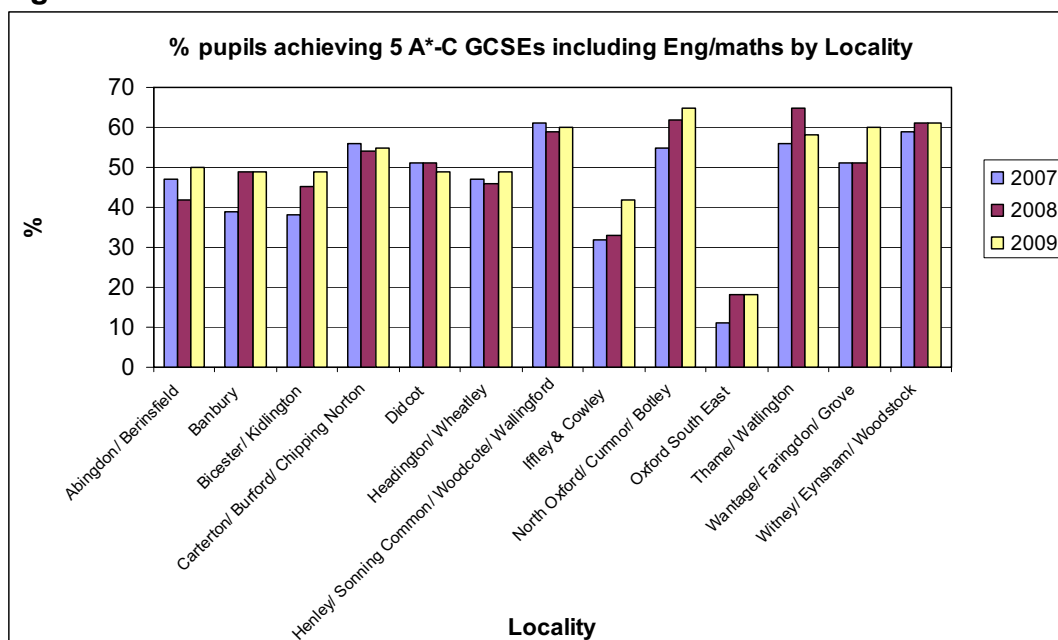
In 2009, 11 schools (32%) had 50% or fewer pupils achieved 5+ GCSEs A*-C including English and Maths, an improvement from 13 schools in 2008. These results need to be used to target services and resources by all organisations.

d. Inequalities in attainment by locality

The overall shape of GCSE results achieved by pupils attending schools situated in the 13 agreed localities for children's services has changed little overall during the year. There have been welcome increases in Iffley/ Cowley (9% increase), Wantage/Faringdon/Grove (9% increase) and Abingdon/Berinsfield (8% increase). Banbury and Oxford South East localities which both showed welcome increases in 2008 have maintained these results.

The percentage of pupils achieving 5+ A*-C inc English and Maths obtained by pupils attending schools in Oxford South East (including Blackbird Leys and Rose Hill – the area served by the Oxford Academy) and Iffley & Cowley remains markedly lower than the rest of Oxfordshire.

Figure 3.8



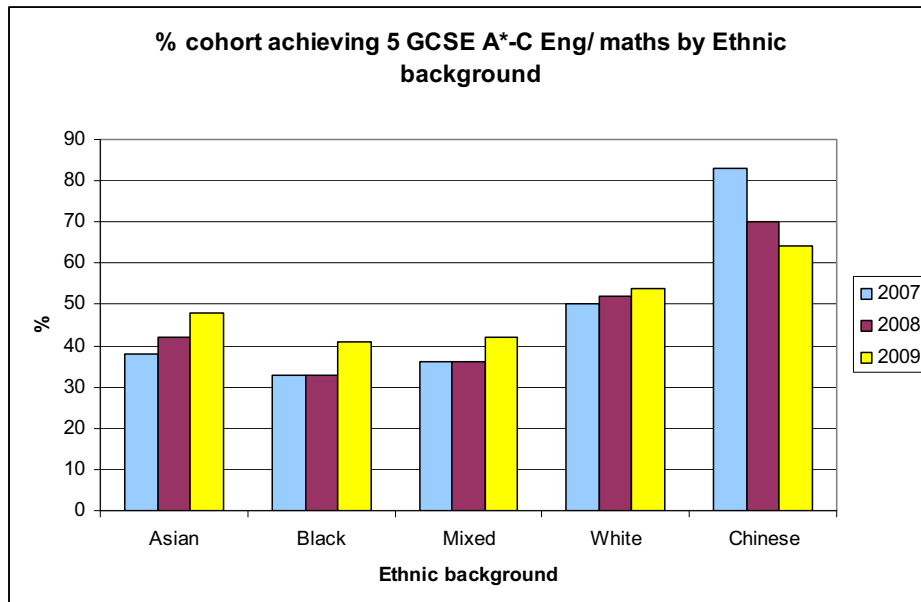
Source: DCSF statistical first releases Dec 2009

e. Attainment in black and minority ethnic groups

The chart below shows that over the previous 3 years the proportion of pupils from Asian, Black and Mixed backgrounds achieving 5A*-Cs including English and Maths has been consistently below the Oxfordshire average. **However in 2009 the proportion of pupils**

reaching 5A*-Cs from all 3 of these groups increased noticeably (pupils from Black backgrounds improved by 8%, Asian and Mixed backgrounds improved by 6%). The results also show that the proportion of children from Chinese backgrounds achieving 5 A*-C including English and Maths has fallen in recent years. The performance of Black and Minority Ethnic (BME) groups has improved overall which is to be welcomed, but there is room for improvement and this remains a cause for concern.

Figure 3.9

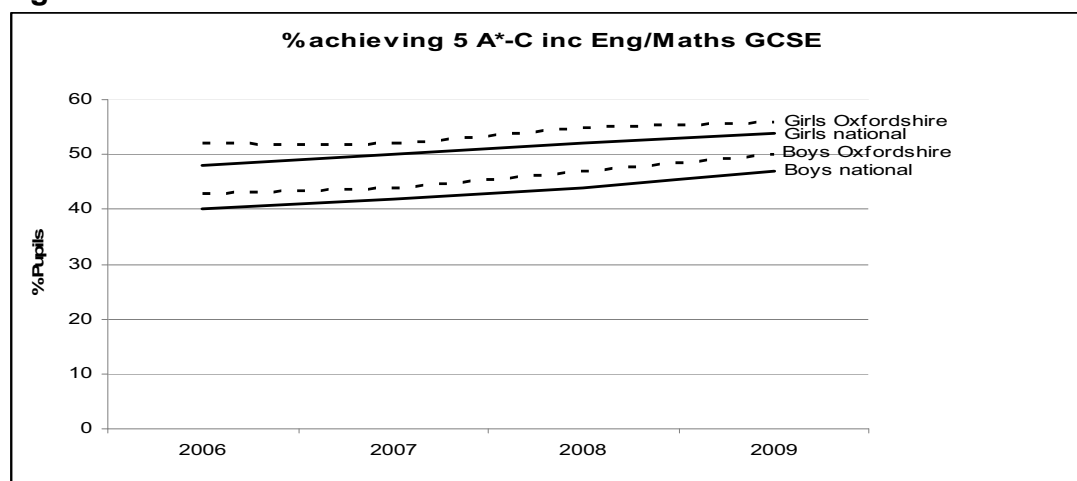


Source: DCSF statistical first releases Dec 2009

f. Differences in attainment between boys and girls

The data below shows that girls consistently out perform boys by around 6-8 percentage points in GCSE performance. This mirrors the national picture and represents a further inequality to be investigated by the Children’s Trust. The picture is more complex when looking at individual subjects, however. For example, girls consistently outperform boys in Science and in English, whereas in Maths performance is more evenly balanced.

Figure 3.10



Percentage of pupils achieving:		Results							
		National				Oxfordshire			
		2006	2007	2008	2009	2006	2007	2008	2009
5+ A*-C inc GCSE En & Ma	Boys	40	42	44	47	43	44	47	50
	Girls	48	50	52	54	52	52	55	56

Measure 7: Oral health

Oral health in children is an important marker of general health, inequality and deprivation.

Dental decay significantly compromises health and well being throughout life as well as causing pain and discomfort. Oral health problems in children are largely preventable. Oral health has improved over the last 30 years but there is still a long way to go

The last national survey of 5 year olds (2007/2008) indicated that although the County as a whole was better than the England average, children living in Oxford and Cherwell had higher than the National average levels of tooth decay (measured in decayed, missing or filled teeth - DMFT), 1.32 and 1.2 teeth decayed, missing or filled per child respectively, compared to children in other areas of the county. This underlines the familiar pattern of inequality seen in Oxfordshire.

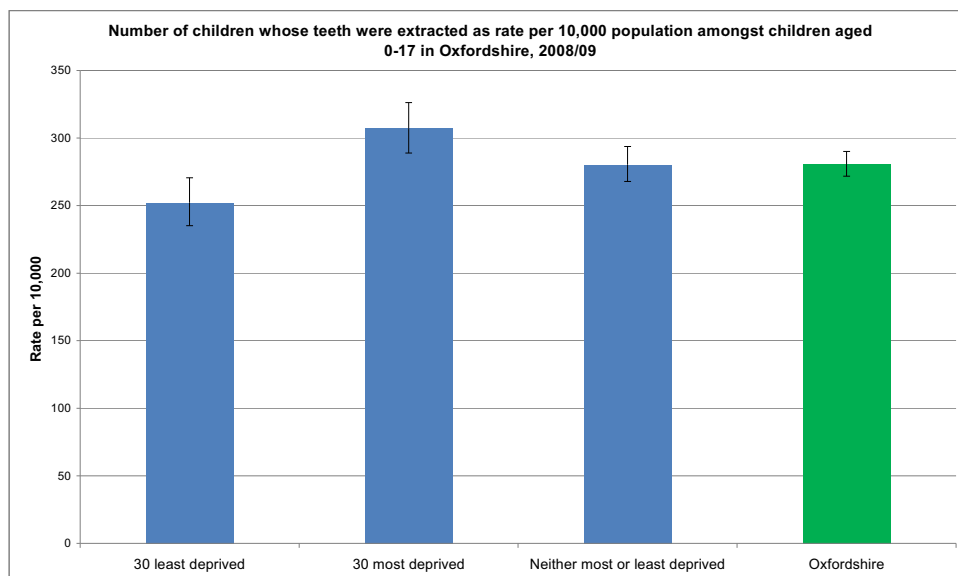
Table 3.1

Local Authority/PCT	Average number of decayed missing or filled teeth.
Cherwell	1.20
Oxford	1.32
South Oxfordshire	0.47
Vale of White Horse	0.59
West Oxfordshire	0.63
PCT Average	0.86
England	Average = 1.11. Range for all PCTs = 0.48 to 2.50

Another indication of inequalities in our children’s oral health is the number of children who had teeth extracted under general anaesthetic in primary care dental services in the community. This is demonstrated by the graphs below. There is a statistically significant difference in the rates of extraction between the 30 most and the 30 least deprived wards.

In 08/09, 486 children aged 0-17 had dental extractions. Again, many of these would have been preventable given good oral hygiene.

Figure 3.11



To try to improve this situation, in the last year NHS Dentistry provision in Blackbird Leys and Banbury has been increased. Following the opening of the new practice in Blackbird Leys the percentage of the local population seen by an NHS dentist has increased from 47% to 62%. Over 3000 patients have been seen by the new practice since August 2009.

An oral health education programme has also been commissioned to address the health needs of vulnerable children in Oxfordshire. This includes training professionals to be oral health educators. A pilot project in two schools in Oxford City and Banbury will aim to measure the effectiveness of health education, screening and the application of fluoride varnish in a community setting to help improve the oral health of children.

Recommendations

Recommendation 1

Oxfordshire County Council, Oxfordshire PCT and Local Authorities should continue to drive forward plans to further integrate children's services planning and commissioning across the county under the Children and Young People's Trust through the Directors for Children, Young People and Families and the PCT Director of Service Redesign so that clear process and outcome measures for commissioning plans are agreed by March 2011.

Recommendation 2

The Oxfordshire Children and Young People's Trust should ensure that all community services and community resources for children living in localities with high levels of social deprivation (including schools) are better coordinated so as to target those who need the services the most, with the aim of bringing the areas with the lowest outcome measures up to the county average. This work should show demonstrable progress by March 2011.

Recommendation 3

The Children and Young People's Trust should review initiatives aimed at preventing and treating obesity in children across Oxfordshire and should consider re-directing resources towards primary prevention of obesity by March 2011.

Recommendation 4

The Oxfordshire Children's Trust Board should receive regular progress reports from the '6 Chiefs' work (described below), which overlaps with the Children's Trust programme of work called 'Minding the Gap', with a view to integrating this work into Children and Young People's Trust planning by March 2011.

2. Breaking the Cycle of Deprivation in the Most Deprived Wards of Banbury and Oxford

What recommendations were made last year?

The thrust of last year's recommendations was that:

- Organisations should join forces to break the cycle of deprivation **because no one organisation can do it alone. This has been achieved.**
- Priorities identified for change should be identified and action plans should be produced. **This has been partly achieved.**
- The chief officers of Oxfordshire County Council, Oxford City Council and Cherwell District Council should join forces with the chief officers of Oxfordshire PCT and the Police Force in Oxfordshire to steer and direct this work, which is consequently now known as the "five chief's project". **This has been achieved.**
- The Oxfordshire Partnership should actively oversee this work and ensure that concrete action happens. **This has been achieved and is ongoing.**

Progress in Detail

OPINION: Good progress has been made. A clear strategy with clear outcome measures and action plans now need to be finalized so that we can drive on to make lasting change.

This initiative has had a successful year. All of last year's recommendations have been achieved or partly achieved. Since this issue was first brought to prominence two years ago it has now become a mainstream priority across Oxfordshire. Positive developments are described below.

The 5 Chiefs met in May 2009 and agreed how they wanted to run this project, focusing on 4 major priorities. These are:

1. Giving children a good start in life by supporting vulnerable families
2. Improving employability by focusing on improved skills and increasing job opportunities
3. Improving the physical environment including housing and housing policy
4. Reducing health inequalities e.g. by identifying those at risk of heart disease

It was agreed to develop an "Oxfordshire Model" through careful evaluation of this first stage of work. This is important: If we can prove we can make lasting change then we can use this model elsewhere in the County.

Work began in Oxford as part of a broader piece of work to regenerate parts of the city. Priorities for Blackbird Leys, Greater Leys, Rose Hill and Littlemore and Barton wards have been set.

Following thorough analysis of the local situation, work in Banbury is focusing on parts of Neithrop, Ruscote and Grimsbury wards.

A bid to the Public Service Board for £1 million of one-off 'reward grant' money was successful. This money will be used to start work off in the target localities.

Because of the importance of developing peoples' skills, a sixth chief officer has been added to the steering group from Oxford and Cherwell Valley Colleges making it the "six chiefs' project". This move is designed to reduce the number of people not in education, employment or training (and so reduce the level of NEETS mentioned earlier in this chapter).

Ways of working in the next year which will help us to break the mould for the long-term are:

- Building solutions by **joining up existing services** which are already part of core funding rather than relying on temporary add-ons from the reward grant and other short-term funding - ***we want to eat the whole cake, not just the icing.***
- **Keeping it simple** so that we can really measure the impact of a few key changes.
- **Making sure we can measure not only the end results, but also the milestones along the way.**
- Taking a scientific approach and **evaluating the degree of success** in a small area or for a small group of families so that we can definitely say whether this approach works or not.

Recommendations for 2010/11

Recommendation 1

By March 2011, the six chiefs should ensure that this project has work plans in place which concentrate on:

- joining up existing core services
- identifying simple and definable service improvements that can be measured, focused primarily on getting a better start in life
- beginning to evaluate this work.

Recommendation 2

By October 2010, the 6 Chiefs should have agreed a clear 'basket' of measures which will tell them accurately whether or not this work is on track to break the cycle of deprivation in the long term.

Recommendation 3

By December 2010 The Oxfordshire Partnership should have received a specific progress report on this work and should seek evidence of progress in line with the three points in recommendation 1 above.

Recommendation 4

By December 2010 Oxfordshire Partnership and/or Public Services Board should have considered whether this work could be part of a "**Total Place**" initiative (or a similar approach under the new Government) focusing on increasing the number of people in education, training or employment (**and thus reducing NEETS**). This work should seek to coordinate the effort and spending of public sector organisations to achieve more while being more efficient. The focus could be either on specific wards or on specific families who have particularly high needs.

CHAPTER 4: Mental health in adults: avoiding a Cinderella service

What is the Issue and Why Does It Matter?

Last year's report explained why mental health matters. To recap:

- Mental health problems are common: **one in six of the adult population** has a mental illness at any one time. This could happen to any one of us.
- Mental health accounts for a quarter of all disease suffered at any one time.
- Mental health problems strike at economic productivity - nationally mental health problems cost £77 billion a year
- We need to work in partnership to tackle these problems. Factors such as the quality of the physical environment, poverty, inequality, social cohesion and economic prosperity all combine to cause or exacerbate mental health problems.
- There is a high social cost to the individual, their relationships, their families, the wider society and thus the economy: mental health problems affect us all.

What recommendations were made last year and what progress has been made?

OPINION: Real progress has been made during the last year to improve commissioning of mental health services. Effort must now focus on agreeing clear outcome and process measures to drive this work forward.

Last year's recommendations focused on four points:

- That commissioning should be strengthened by the appointment of a senior joint commissioner. **This has happened.**
- That a clear strategy should be produced with clear outcomes. **This is well on the way.**
- That commissioning of services for older peoples' mental health should not be forgotten and should be well developed. **This has not yet happened and remains a high priority.** The section on dementia in chapter 3 sets out part of the problem.
- That issues affecting carers remained a priority for mental health as well as for older people. **Good progress has been made.**

This body of work is now well on track to make a real difference. The issue has been accepted as a major priority, a single strategy is in place and clear priorities have been set. More specific plans are now being drawn up so that progress can be monitored. A mental wellbeing component is also now well embedded in this work which is breaking new ground in Oxfordshire.

A practical example of progress made

A long standing gap in Oxfordshire - access to psychological therapies (counselling, behaviour therapy and the like) - was filled by a new service which began in May 2009. The number of patients seen from across Oxfordshire is shown in the table below and has increased from 2,300 per year to 4,300 per year, planned to rise to 9,000 per year by 2011/12. The service has not been without teething troubles – demand has far exceeded supply for example – but nonetheless, this is an excellent step forward.

Table 4.1: Oxfordshire Residents seen by the new psychological therapies service plus service plans 2008-2012

Year	Actual or planned	Number of patients
Pre 2008	Actual	2,300
2008	Actual	2,700
2009/10	Actual	4,300
2010/11	Planned	7,000
2011/12	Planned	9,000

What happens next?

The success of joint work so far on mental health will inevitably bring into view a new set of challenges to be overcome if this work is to deepen. This is typical of any large programme of work in partnership and is in effect a measure of maturity and success. The next set of challenges to be faced will include:

- Making 'pooled budgets' work efficiently, especially when public sector funds are squeezed. (Pooled budgets contain money that is formally combined by the PCT and County Council for a specific purpose).
- Moving from health and social services planning to more complex issues around housing and independent living for people with Mental Health problems – this will involve closer working with District Councils.
- Collecting accurate information about patients' experiences and using this to shape service planning.

Recommendations

Recommendation 1

The PCT Director of Service Redesign should continue to drive progress forward until improvements to outcomes are achieved. Further demonstrable progress should be in evidence by March 2011.

Recommendation 2

The Director of Service Redesign and the Director for Social and Community Services should ensure that a commissioning strategy for older people's mental health is produced by March 2011 and this should form a part of the Ageing Successfully strategy. This should include a section on the care of people with dementia.

CHAPTER 5: The Rising Tide of Obesity

The importance of preventing adult obesity

Britain is in the grip of an epidemic. **Almost two-thirds of adults and a third of children are either overweight or obese** and it is estimated that, without clear action, these figures will rise to **almost nine in ten adults and two-thirds of children by 2050.**

Because there is a need to revamp our strategic approach to obesity in this County, the case for working on obesity as a priority is set out in more detail than in previous years.

It has been well documented that being overweight or obese increases the risk of a number of diseases. The risks rise the heavier you are and so are greater for people who are obese. For example:

- 10% of all cancer deaths among non-smokers are related to obesity
- the risk of Coronary Artery Disease increases 3.6 times for each unit increase in BMI
- 85% of high blood pressure is associated with being overweight
- the risk of developing type 2 diabetes is about 20 times greater for people who are very obese (BMI over 35), compared to individuals with a BMI of between 18 and 25

A Note on Jargon and Definitions of Obesity and Overweight

Obesity is defined as a body mass index (BMI) of 30 or more. Body Mass Index is measured by weight in kilogrammes divided by height squared. Overweight is defined as BMI of 25 to 29.9.

For example, a man aged 30 who weighs 13 stone 6lb (85kg) and is 6 feet tall (183cm) will have a BMI of 25.4, just in the overweight category; if he weighed 16 stone(101kg), he would enter the obese category with a BMI of 30.2.

For those of you who like maths:

Height squared = $1.83 \times 1.83 = 3.34$

Therefore BMI at 85Kg = $85/3.34 = 25.4$

Therefore BMI at 101Kg = $101/3.34 =$

30.2

A women aged 50 who weighs 10 stone 8lb (67kg) and is 5 foot 4 inches tall (163cm) will have a BMI of 25.3, again in the overweight category; if she weighed 12 stone 10 lb(80kg), she becomes obese with a BMI of 30.2

For those of you who like maths:

Height squared = $1.63 \times 1.63 = 2.65$

Therefore BMI at 67 Kg = $67/2.65 = 25.3$

Therefore BMI at 80 Kg = $80/2.65 = 30.2$

In the worst case scenario, current levels of child obesity mean that today's parents could outlive their children.

It has been calculated that approximately 116,600 adults in Oxfordshire (almost ¼ of all adults) are obese. Adult obesity is an issue across the whole county; however it is likely to be more prevalent in areas with high levels of deprivation.

The case for action

The price of obesity

Obese and overweight individuals place a significant burden on the NHS. Direct costs are estimated to be £4.2 billion nationally and these will more than double by 2050. The costs to Oxfordshire PCT of treating diseases related to overweight and obesity are set to increase by approximately £1 million each year. If current trends continue the estimated annual costs to Oxfordshire NHS of diseases related to overweight and obesity are set to rise from £143 million in 1997 to £159 million in 2015.

A reduction of 10% in body weight has been demonstrated to result in:

- A 20% fall in the total death rate,
- A 91% reduction in the symptoms of angina
- A reduction in blood pressure (of 10mmHg) sufficient to prevent a significant number of heart attacks and strokes.

- Substantial reductions in cholesterol and fats carried in the blood which lead to heart disease and stroke
- A 40% reduction in obesity-related cancer deaths

By 2020 obesity could lead to an additional 6,900 cases of diabetes in Oxfordshire alone, costing an additional £9.8 million each year and/or an additional 1,776 cases of Myocardial Infarction (heart attack) costing an additional £8.5 million each year.

The benefits of healthy eating

Diet-related ill health is responsible for about 10 per cent of deaths in the UK, and is estimated to cost the NHS some £6 billion every year. This is more than double the cost to the NHS of tobacco use. If diets matched the nutritional guidelines on consumption of fruit and vegetables, saturated fat and added sugar and salt intake, around 70,000 fewer people (10% of current annual mortality) would die prematurely each year in the UK. The benefits of meeting the national nutritional guidelines have been estimated to be as high as £20 billion savings each year.

Improving a person's diet by increasing consumption of fruit and vegetables can significantly reduce the risk of many chronic diseases. It has been estimated that eating at least 5 portions of a variety of fruit and vegetables a day could reduce the risk of deaths from chronic diseases such as heart disease, stroke, and cancer by up to 20%.

It has been estimated that diet might contribute to the development of one-third of all cancers, and that **eating healthily is the second most important cancer prevention strategy, after reducing smoking.**

Research suggests that there are other health benefits too, including delaying the development of cataracts, reducing the symptoms of asthma, improving bowel function, and helping to manage diabetes.

Good nutrition is vital to good health. While many people in England eat well, a large number do not, particularly among the more disadvantaged and vulnerable in society. There are many inequalities in nutrition and health that need to be addressed. For example, consumption of fruit and vegetables varies markedly between socio-economic groups. 27% of men and 33% of women in the managerial and professional groups consume the recommended five portions per day compared to 16% of men and 17% of women in routine and semi-routine occupations.

Poor nutrition and inequalities in nutrition are a major cause of ill health and premature death in this county.

The benefits of being active

Getting more people more active is one of public health's best buys. Primary and secondary care costs attributable to physical inactivity have been estimated to cost Oxfordshire PCT £8 million each year.

Almost ¾ (73%) of Oxfordshire's population still do not participate in enough activity to benefit their health.

Inactive lifestyles in England are twice as prevalent as smoking. Evidence shows that **the health impact of inactivity, in terms of heart disease, is comparable to that of smoking and almost**

Recommended physical activity levels

Adults: 30 minutes of moderate intensity physical activity at least 5 days a week. (Should make you slightly breathless and sweaty!)

Children: 60 minutes of moderate intensity physical activity each day

Targets can be achieved with 10-minute bursts of activity spread throughout the day.

as great as having a high cholesterol level. On average, an inactive person compared with an active person spends 38% more days in hospital, has 5.5% more GP visits, needs 13% more specialist services and has 12% more nurse visits.

There is a clear causal relationship between low levels of physical activity and early death. People who are physically active reduce their risk of developing heart disease, stroke, cancer and diabetes by up to 50%, and the risk of premature death by about 20–30%. Inactivity also has far-reaching implications for the wider public sector. Increased activity promotes independent living in older adults, and thereby reduces the cost of social care.

Oxfordshire has already made good progress in getting more people more active. Since 2006 an extra 20,000 more adults are now more active as a result of increased physical activity opportunities across the county. However a great deal still needs to be done to promote activity further.

Conclusion: Making modest improvements to your diet and physical activity really can really benefit your health as an individual, but these changes have to be made by the majority to prevent the growing spend on obesity-related diseases. The main focus of work must be on making it easier for the majority to adopt healthier lifestyles.

What was recommended last year?

In last year's Annual Report, 3 recommendations were made as follows:

- Progress against the County Obesity Strategy should be formally reviewed and reassessed. **This has been done (see below).**
- All public sector organisations should identify an obesity champion. **This has not been achieved and the immediate need for it is superseded by the results of the review of the strategy.**
- True levels of obesity can be measured in Oxfordshire's population. **To report BMI for the population of a single county has proved to be a more complex task than envisaged and remains a priority for the new strategy. To do this meaningfully will take time as the science is complex.**

Progress in Detail

OPINION: A good start has been made over the last 3 years and the coordination of work across the County is the envy of our neighbours BUT we need to take a step back during the next year and re-focus our effort on 'an ounce of prevention' for the majority of people by revamping our strategy and focusing on what really works. All organisations will need to play a part.

An appraisal of the existing strategy confirms that we have made a good start on grouping together work and coordinating current efforts. We have improved levels of physical activity, but childhood overweight and obesity are on the increase. **(See chapter 4 which shows that our children are now more overweight than the national average and that we are less far ahead of the national average than last year for childhood obesity).**

The review of our existing work shows both the good work done and the scope for further achievement. The main points of the review are summarised below.

Ownership of strategy

There is a perception that this is largely a PCT strategy not one “owned” by key partners. Consequently responsibility for tackling obesity rests with the PCT. Action plans should be drawn up collaboratively and signed off by all key partner agencies (especially by the PCT and Local Authorities).

Accountability

We need to make sure that “children’s” initiatives join up with “adult” initiatives as one is reported to the Children’s Trust and the other to the Health and Wellbeing Partnership Board.

Physical activity initiatives

In general there is a co-ordinated approach to these interventions countywide, although the focus is on sport rather than everyday physical activity such as walking and using stairs instead of lifts.

Healthy Eating initiatives

A more strategic approach to healthy eating is required. There is lots of good practice countywide but it is patchy and not joined up.

Health and Social Care settings

The primary focus of the strategy to date has been to develop a high quality care pathway for people who are overweight and obese. We now have a clear pathway from early intervention to surgical treatments. More focus also needs to be given to weight management for people with long term conditions. Interventions in social care settings are not clearly mapped and work needs to be undertaken to strengthen these services.

Primary prevention (i.e. preventing obesity in the first place)

The revamped strategy needs to place greater emphasis on primary prevention and early identification. GPs and Local Authorities will have a major role to play in this.

Getting thinking on diet and exercise into planning decisions at all levels

There are more questions than answers here For example, we need to attempt to influence planning decisions and influence supermarket chains to make healthy food more attractive and available. Who is going to buy apples when you can get 5 Mars bars cheaper? (5 Mars bars cost £1.68; a bag of gala apples (approx 6-8) costs £1.75) Which young person is going to eat salad when they can get chips from the shop next to the school/college etc? What can we do to influence food policy at a national level and how can we ensure sports facilities do not get cut in spending reviews as these will impact on what we can achieve? There is some comfort in the fact that the latest long term plan for roads in Oxfordshire (called, in the jargon, Long Term Plan 3 or LTP3) contains things like provision of footpaths and cycle paths within its structure. Health promotion staff from the Public Health team are also part of the planning group.

Recommendation

The County strategy for prevention of obesity should be reviewed and refreshed by March 2011 through the Director of Public Health. The new strategy should be a true partnership effort and should have an emphasis on the prevention of obesity rather than its treatment. It should include a focus on the important role of GPs. Work with children and adults should be seamless. Those at increased risk should be targeted.

CHAPTER 6: Fighting killer diseases

The issue

Killer diseases remain a threat to the population of Oxfordshire. However their impact can be reduced by good surveillance and information, early identification and swift action, basic cleanliness, hand washing and good food hygiene.

By far the biggest event in 2009-2010 was the worldwide flu pandemic, which saw the emergence of swine flu caused by a new type of influenza A virus – H1N1.

This chapter reports on the recommendations from the 2008/09 DPH Annual Report and highlights the work around the flu pandemic. It also sets out the current state of play around important diseases and makes recommendations for action.

Progress report on 2008/09's recommendations

All the recommendations from the last DPH annual report have been addressed met as follows:

- Hepatitis C infection has been reviewed and a strategy and action plan drafted (see below);
- The PCT has invested in infection control and health protection;
- Investment has continued in Tuberculosis (TB) with new funding being directed to improving access to vaccination against TB for children at increased risk.

Progress in detail:

This section sets out the current position on the killer diseases which most threaten the health of the people of Oxfordshire.

OPINION: Killer diseases are well managed in Oxfordshire but remain an ever-present threat. Constant vigilance is required.

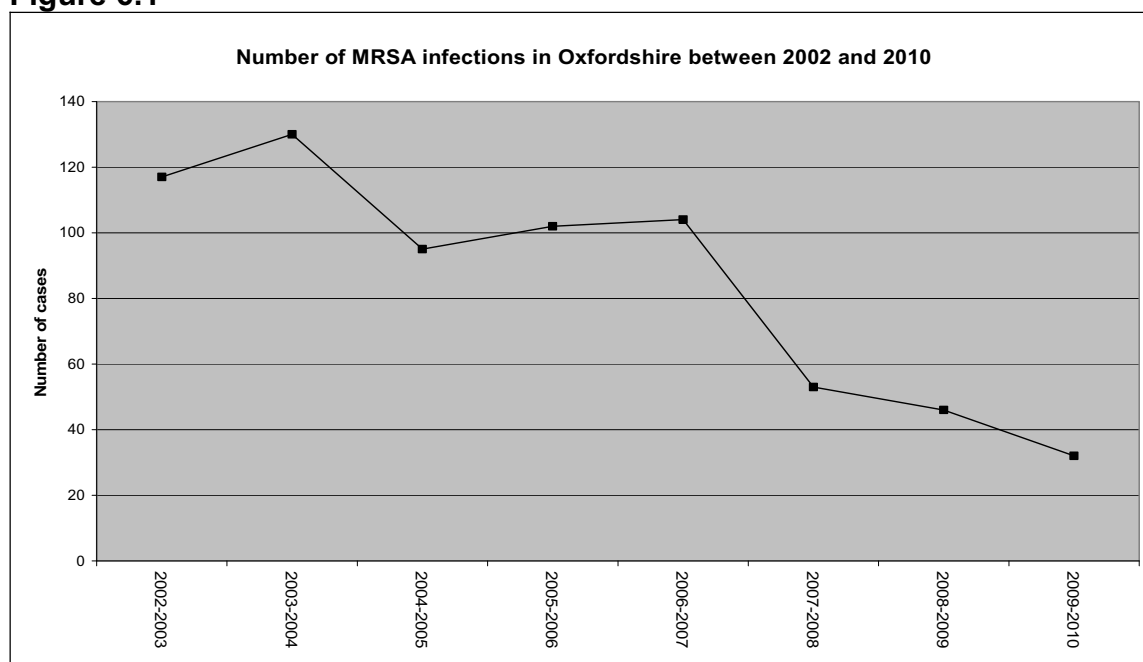
1) Health Care Associated Infections

Infections caused by superbugs like Methicillin Resistant Staphylococcus Aureus (MRSA) and *Clostridium difficile* (*C.diff.*) remain an important cause of sickness and death, both in hospitals and in the community. However numbers of infections **can** be reduced and considerable effort has been put into tightening all our systems to reduce the numbers of cases. As a result, we are seeing a reduction in the numbers of infections associated with hospital settings and now need to work to get a decrease in the community.

a) Methicillin Resistant Staphylococcus Aureus (MRSA)

MRSA is a bacterium found commonly on the skin. If it gains entry into the blood stream (e.g. during surgery or other invasive procedures) it can cause blood poisoning (bacteraemias). It can be difficult to treat as it is resistant to commonly used antibiotics. MRSA bacteraemias continue to fall during 2009/10. The graph below shows the impressive achievement of the last 7 years.

Figure 6.1



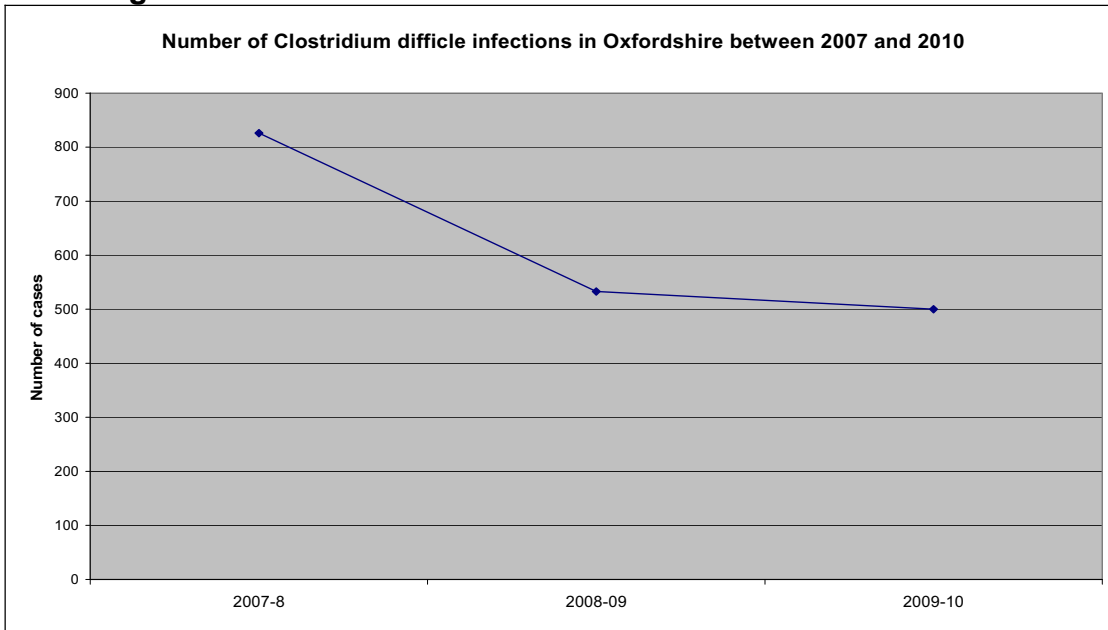
Approximately a third of MRSA bacteraemias are diagnosed within 48 hours of admission. These cases are reviewed by the PCT and a significant number are due to long term indwelling urinary catheters. As a result a countywide project is ongoing to reduce this cause. All planned admissions to our specialist hospitals are now screened for MRSA and if necessary patients are treated to remove the bacterium from their skin.

b) *Clostridium difficile* (C.diff)

Clostridium difficile is a bacterium that causes mild to severe diarrhoea which is potentially life-threatening especially in the elderly and infirm. This bacterium commonly lives harmlessly in some people's intestines but some antibiotics can disturb the balance of bacteria in the gut which results in the *C.diff* bacteria producing illness.

Cases of *C.diff* are thought to have started outside hospital if they are diagnosed within 72 hours of hospital admission. These account for about half of all cases. No one can say for sure how these cases arise, but general practices with high numbers of cases have been reviewed by the infection control team and a pharmacist to check prescribing of antibiotics and the quality of infection control. The data below shows the reduction in cases since 2007/08. Work continues on reducing inappropriate antibiotic use, improving the speed of isolation of suspected cases and improving cleanliness in hospitals.

Figure 6.2



2) Tuberculosis (TB) in Oxfordshire

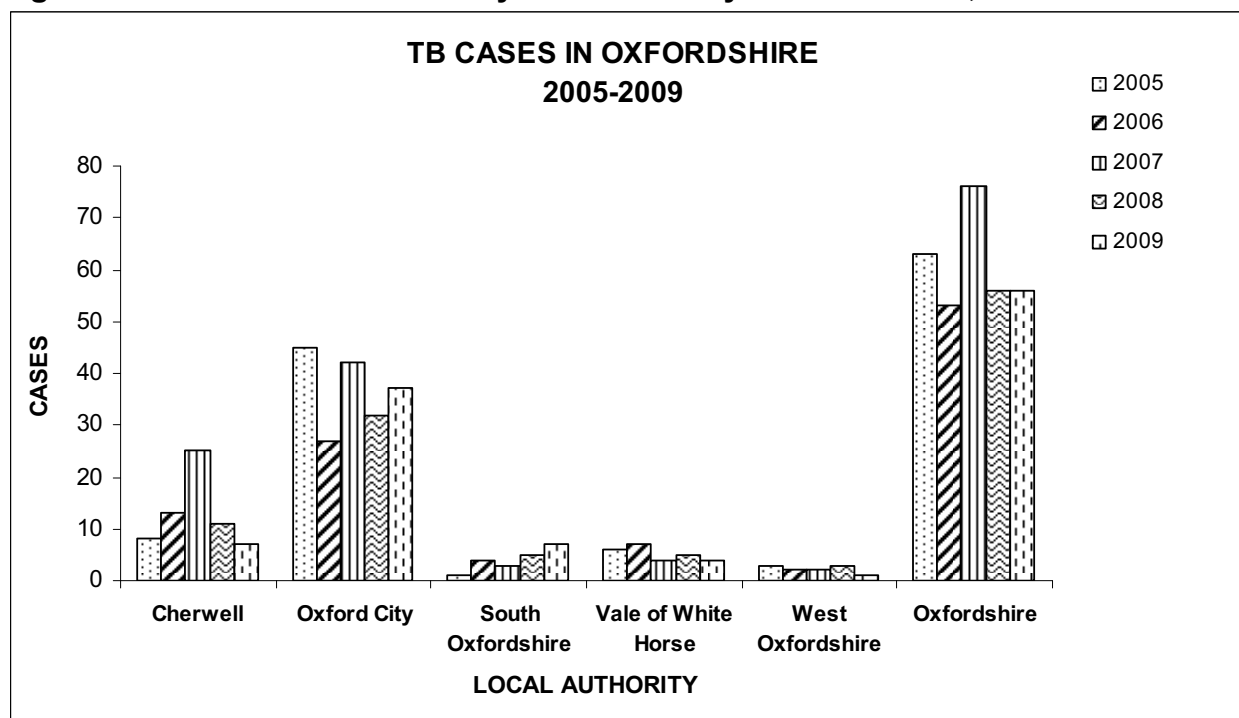
The latest data shows that TB rates in Oxfordshire fell compared with rates in 2007. Rates have remained highest in Oxford City and Cherwell District Council over the last five years (Fig 1). The substantial drop from 2007 to 2008 in the Cherwell District Council population follows the detection and successful treatment of a cluster of linked cases in this area during 2007.

Table 6.1: Tuberculosis incidence rate in Oxfordshire

Year	Number of cases	Rate per 100,00 population
2005	63	10.3
2006	53	8.4
2007	76	12
2008	56	8.8
2009	55	8.8

The Oxfordshire incidence rate of TB is consistently lower than the UK rate which provisional data suggests is 14.9/100,000 for 2009 across the UK. **This is a good achievement.**

Figure 6.3: Tuberculosis cases by local authority in Oxfordshire, 2005-2009



In Oxfordshire 55 TB cases were reported in 2009.

The Chief Medical Officer set local services a target of recording all TB cases and completing successful treatment in 85% of cases. Oxfordshire successful treatment rates have risen to 89.3% in 2008 (above the Thames Valley average) compared with 83.3% in 2006 and 84.2% in 2007.

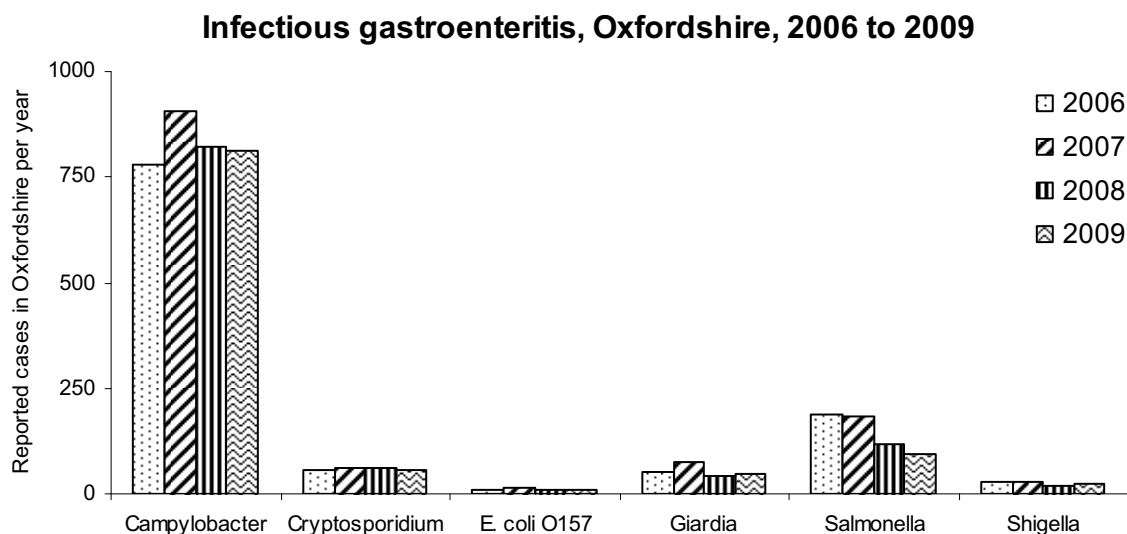
3) Gastrointestinal Disease

Food poisoning and other forms of infectious gastroenteritis continue to be a substantial burden of disease on the population of Oxfordshire. National regulations and standards are implemented locally by the environmental health staff of district councils. This year the five district councils in Oxfordshire collaborated to launch the excellent “Scores on the Doors” project where restaurant hygiene ratings are displayed prominently in restaurants and on the internet at <http://www.scoresonthedoors.org.uk/fac.php?area=SE&county=OX>. This is part of the ongoing work to ensure that safe food is served to the Oxfordshire population and visitors to the county. The need for continued public health work to assure safe food is shown by substantial numbers of cases of food borne disease in the County.

Surveillance data

There were over 1,000 reported cases of infectious gastroenteritis in 2009. This was an improvement on the previous year and shows satisfactory progress, apart from campylobacter infection which remains a cause for concern (see below).

Figure 6.4



More information on infection control is available from the health protection unit tvhpu@hpa.org.uk.

All of these infections can spread from person to person but this is usually easily prevented by hand washing and avoidance of preparing food for others while infected. For *Cryptosporidium*, infected children swimming in pools appear to be an important ongoing risk and all reported cases now receive advice to help with this.

The large number of cases of *Campylobacter* gastroenteritis is near to record highs, and with an estimated 8 cases occurring for each of the 811 that were confirmed by laboratory testing, we estimate that over 6,500 people suffered from this infection in the county in 2009, with young children being particularly affected. The main protection that is available to reduce this risk locally is to ensure that chicken is always well cooked and that raw chicken is not allowed to come into contact with other foods.

4) Vaccine Preventable Diseases

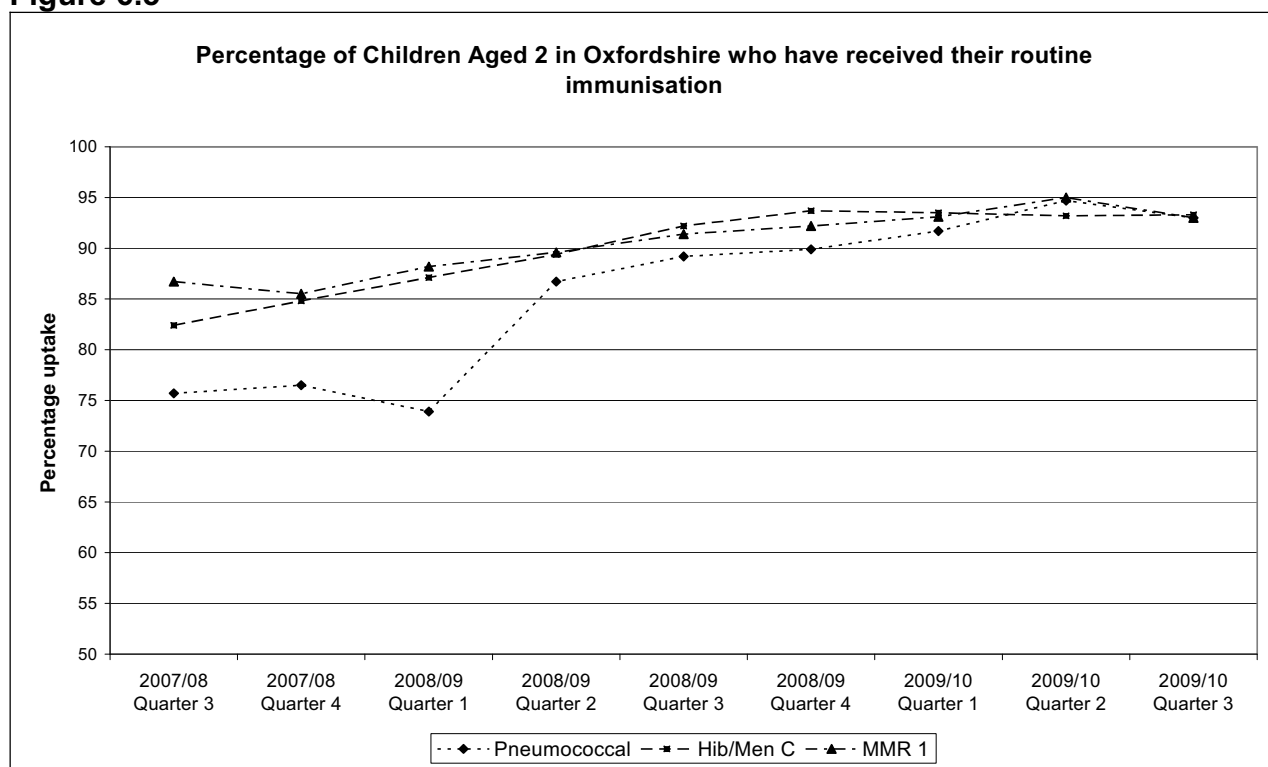
a) **Childhood immunisations**

Vaccination is the most cost-effective medical public health intervention. Levels of immunisation for childhood diseases in Oxfordshire have improved steadily over the years. A huge amount of work has been done to improve the way data is collected and recorded resulting in much more accurate information held by GP practices and the PCT. Practice staff, community staff and the PCT have been working together to achieve this – and this work was recognised nationally when the team were ‘highly commended’ at the Health Service Journal awards in November 2009.

A new Child Health Information System went ‘live’ in mid February 2010; this is an absolutely essential tool for keeping information accurate and quality high. This small number of children who are unimmunised can now be followed up individually and offered immunisation.

From the data up to February 2010 we anticipate that Oxfordshire will achieve the national targets set for immunisation. The graph below shows progress made.

Figure 6.5

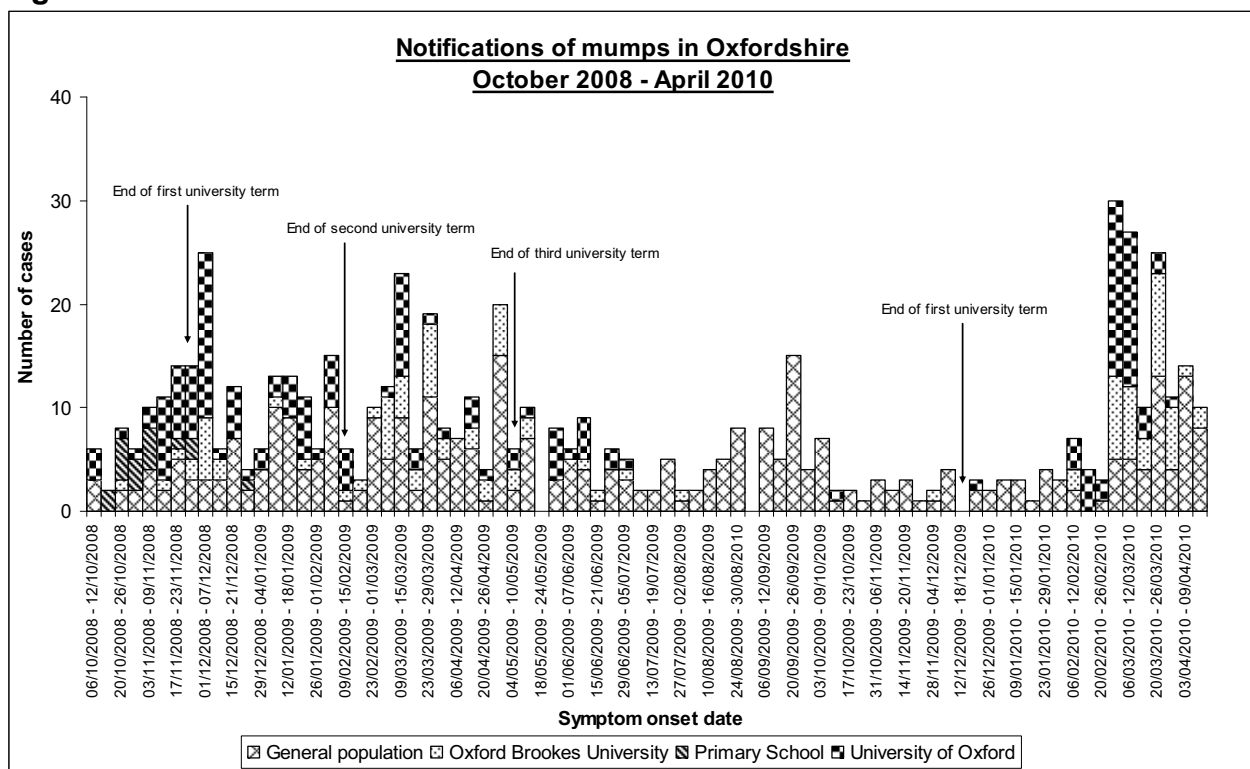


b) Measles Mumps and Rubella vaccine (MMR)

Two doses of Measles Mumps and Rubella vaccine (MMR) provides 99% of people with long term protection against measles (and 100% protection to the whole population if coverage is sustained at in excess of 95%). In the absence of vaccination there would be approximately 8,000 cases of measles per year on average in Oxfordshire. Of these, approximately 40 people would suffer convulsions as a complication, 8 encephalitis and an average of 1 person per year would die. However, the very success of vaccination programmes can lead to complacency, a fall in vaccination levels, and the recurrence of diseases. This has happened nationally with the resurgence of measles leading to over 1,100 cases nationally between January and September 2009, including 40 in the Thames Valley. Because we have prioritised vaccination in Oxfordshire, there were only 2 cases between January and October 2009 and 1 in 2008. Nonetheless, because the stakes are so high, the PCT has begun a major programme to improve performance further.

The relatively low rate of measles in Oxfordshire over the past year contrasts with an increased number of cases of mumps due to spread among university students in Oxford arriving from out-of-county (Figure 4). This involved students in an age group who had received only one dose of MMR and one of MR (measles and rubella but lacking mumps) in the 1994 MR campaign.

Figure 6.6



Provision of vaccination by general practitioners and information e-mailed to university students during the 2008/2009 academic year partly closed this gap in protection. Information highlighting this problem was provided to new students for the 2009/2010 academic year before coming up to university in an “MMR vaccination: it’s not just for children” information sheet allowing them to ensure with their usual general practice that they were protected before leaving home.

c) Human Papilloma Virus vaccine (HPV): preventing cervical cancer

Genital human papilloma virus (HPV) is the most common sexually transmitted infection. It is so common that at least 50% of sexually active men and women get it at some point in their lives. There is no treatment for the virus itself but a highly effective vaccine is available that protects against HPV types 16 and 18, the types most commonly associated with cancer between them cause over 70% of all cervical cancers. **HPV vaccination will save the lives of an estimated 400 women each year in the UK with 4 lives saved per year in Oxfordshire.**

The first cohort to be immunised were girls in school year 8 in 2008/09, who were offered a three-dose course of HPV vaccination in school, over six months. A very impressive 90% of the girls took up the offer to have the three doses of HPV showing a highly successful start to a new vaccination programme. A catch up programme, the next phase of the HPV programme, started in September 2009 offering HPV to all girls up to the age of 18 years at 31 August 2009.

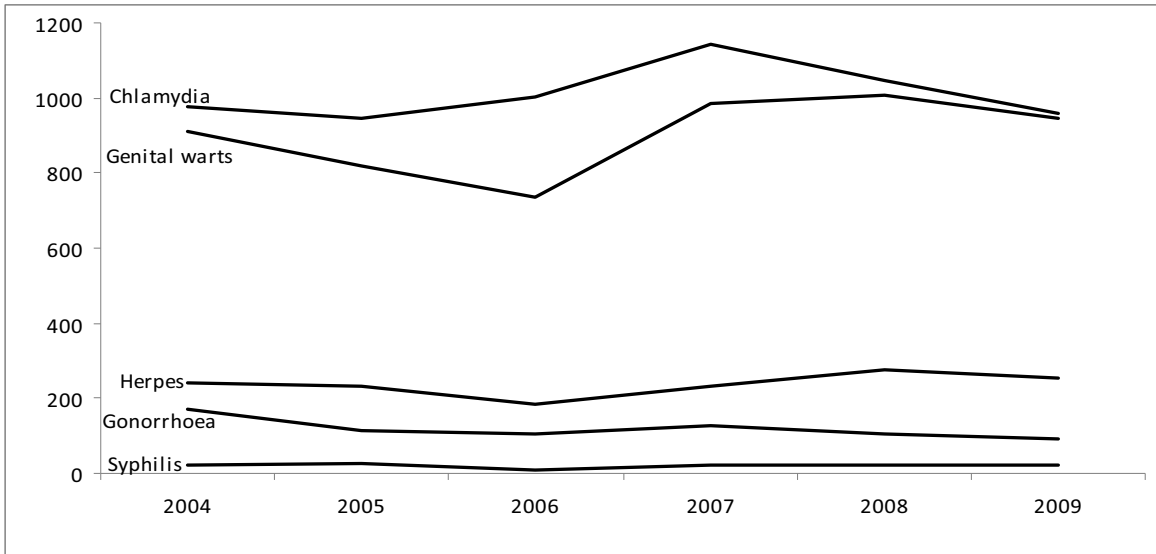
This new vaccine is a significant step forward in the prevention of cancer.

5) Sexually transmitted infections

It is important to monitor sexually transmitted diseases carefully to watch for increases in disease, the vast majority of which are preventable through taking basic 'safe sex' precautions.

Overall sexually transmitted infections diagnosed at genitourinary medicine clinics in Oxfordshire show a largely stable picture over the long term although there is some year to year variation. It is heartening to see that all the major sexually transmitted diseases fell during the last year. Chlamydia and genital warts remain the most common although there have been decreases in Chlamydia cases over both 2008 and 2009 from a high in 2007.

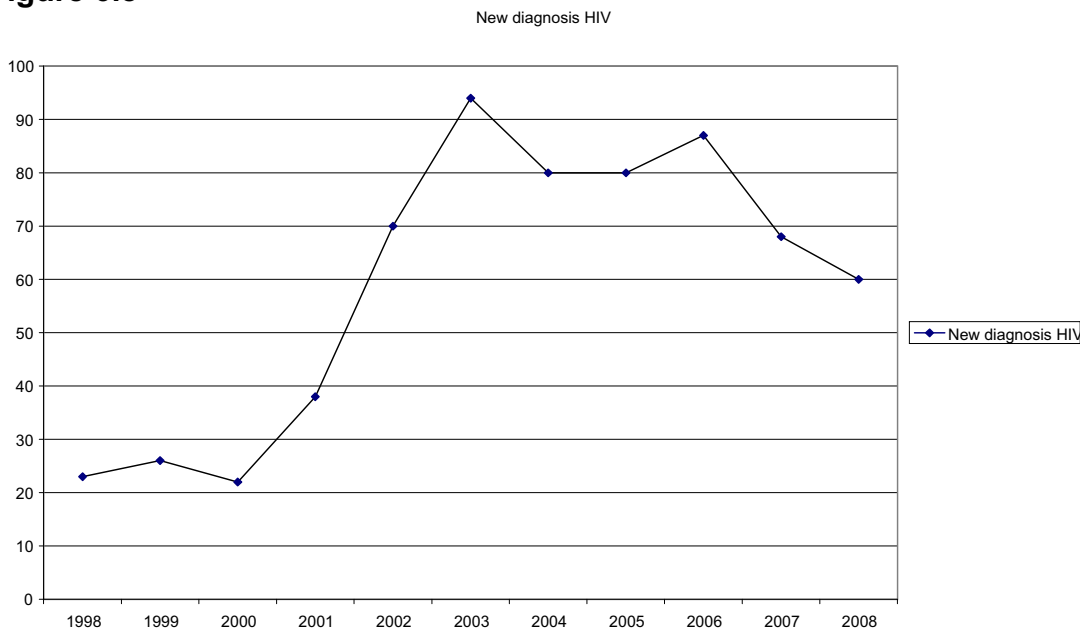
Figure 6.7: Sexually transmitted infections diagnosed at genitourinary medicine clinics in Oxfordshire, 2004-2009



HIV & AIDS

In 2008, there were 60 new HIV diagnoses across Oxfordshire and 267 across the Thames Valley, continuing the welcome downward trend begun the previous year. Work continues with vulnerable groups, delivered through partnerships with Terence Higgins Trust and Oxfordshire County Council.

Figure 6.8



6) Hepatitis C virus infection (HCV)

HCV is a blood borne virus that causes liver disease. A small proportion of cases go on to develop cirrhosis of the liver and a small proportion of these will contract liver cancer and die of the disease. HCV is contracted if a small amount of blood from an infected person gets into someone else's bloodstream. Most cases are injecting drug users, people who received blood transfusions in the UK before screening began in 1991 and people who have had transfusions in parts of the world where quality controls are poor. Many people will remain symptom-free and so will be unaware they have it.

The number of people estimated to be infected with HCV in Oxfordshire is around 2,000. 52 people were offered treatment in 2009/10.

Last year's DPH annual report called for the situation to be improved.

Oxfordshire PCT has worked productively with partners throughout 2009 to understand the current picture, identify the gaps, and draft a strategy to prevent this disease and improve treatment. This work is ongoing.

7) Influenza A (H1N1) – The Swine Flu Pandemic

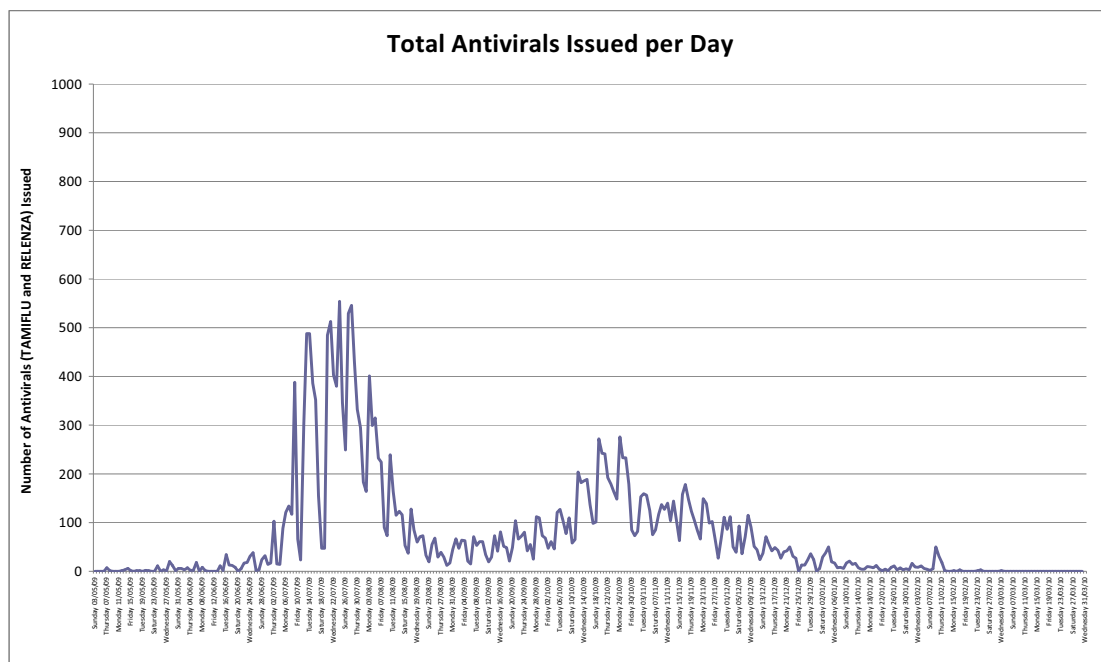
Influenza A (H1N1) was first identified in Mexico in April 2009. In June 2009 the World Health Organisation declared that it had become a pandemic, which meant that the virus had spread around the globe. It spread quickly because it was a new type of flu virus to which few people have full resistance. In most cases the virus has proved to be mercifully mild, however around the world hundreds of people have died. The confused picture in the early days in Mexico led the world to expect a virulent pandemic and so a full emergency response was triggered.

Oxfordshire has spent the last 4 to 5 years carefully preparing for a pandemic and this meant that the NHS and Local Authorities were able to respond very quickly. The multi-organisational response was excellent and all organisations played their part. Support from and teamwork with the Health Protection Agency, the Police, and a wide range of organisations were crucial to success.

In addition, Oxfordshire successfully took an overall lead for health services across the Thames Valley. In the first stages the PCT was able to support the Health Protection Unit and primary care in swabbing and treating individuals with confirmed disease and providing prophylactic antiviral drugs to slow down the spread of the infection in people who had contact with those with suspected swine flu.

As the numbers of individuals with suspected swine flu increased, the PCT opened antiviral collection points around the county to enable individuals to get their antiviral drugs. Numbers peaked at around 500 doses given per day. As numbers reduced access to antiviral drugs came from community pharmacies. The graph below shows the number of courses of antiviral drugs that were issued during the pandemic.

Figure 6.9



In June 2009 guidance was received from the Department of Health (DH) regarding the vaccination against swine flu and Oxfordshire PCT implemented a vaccination programme. This included making vaccination available to frontline health and social care workers and to priority groups including those that were pregnant, immunosuppressed or at higher clinical risk and to those between 6 months and 5 years. Data shows that Oxfordshire PCT achieved a high rate of uptake in health care workers thus protecting themselves and those patients with whom they have contact.

Table 6.2: The total number of frontline health care workers that have been vaccinated by each PCT in the Thames Valley as at 28 February 2010

Organisation	Eligible	Vaccine administered	%
Milton Keynes PCT	1,164	480	41.2
NHS Oxfordshire	3,343	1,350	40.4
Buckinghamshire PCT	3,017	921	30.5
Berkshire East PCT	2150	721	33.5
Berkshire West PCT	2,373	641	27.0

No Oxfordshire resident died of swine flu throughout the pandemic.

The question arises, was it all a storm in a tea cup? The answer is an emphatic no! Because of this pandemic we have learned much and improved services in new ways as follows:

- We know our joint plan works and it can now be improved
- We know that organisations in Oxfordshire and Thames Valley can cooperate well in a long drawn out emergency.
- We now know that we can slow down the spread of a pandemic through cough etiquette and handwashing
- We now know how to set up mass local and national phone-in services
- We now know how to give mass treatments to hundreds of people day after day
- We now know how to immunise thousands of people at short notice

- We know more about patterns and speed of spread around the globe and how these can be slowed down
- We now have a much better-linked network of intensive care services across Thames Valley.
- Improved planning also has wider benefits. Lessons learned during the flu pandemic helped the County deal better with the heavy snowfalls last winter.

OPINION: We are performing well in the fight against killer diseases in this County. There is no room for complacency and we need to refocus our efforts year on year to stay abreast of these diseases.

Recommendations

Recommendation 1

The Director of Public Health and the local Health Protection Agency must work closely to maintain surveillance of communicable diseases during 2010/11 and take appropriate steps to control these diseases and any new emerging killer diseases.

Recommendation 2

Oxfordshire PCT should continue to be ready and prepared to make investment in infection control services and health protection, through 2010/11.

Recommendation 3

The Director of Public Health should report on killer infections and infectious diseases in the DPH annual report in April 2011.

CHAPTER 7: Alcohol: What's your poison?

Why is it time to take Alcohol seriously as a major Public Health issue?

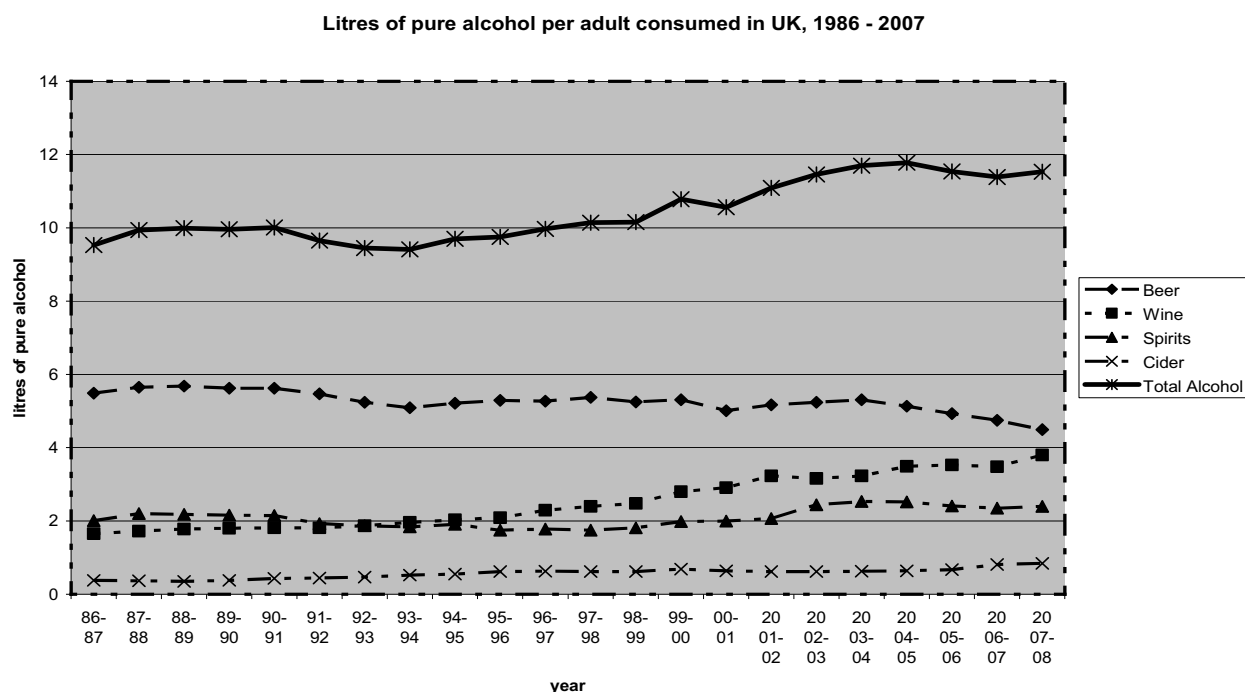
Alcohol is perhaps the last major gap in Oxfordshire's Public Health defences.

Despite good, innovative work in the county over recent years, this issue is not yet sufficiently in the mainstream of Oxfordshire's policy making, and it needs to be. Why? Alcohol is a deeply ingrained part of British culture. It is widely used in the home as a relaxant and its effect in lowering inhibitions is valued in social gatherings. Indeed, to many, the presence of alcohol is a social signal that says 'party'. Indeed, the majority of adults in our society do control their drinking and 9% abstain altogether. So, what is the problem? The list is as follows:

Alcohol consumption has risen in the last 40 years

In England, average adult alcohol consumption has risen by 40% since 1970. The graph below shows the recent trends in consumption.

Figure 7.1



Source: Institute of Alcohol Studies Factsheet "Drinking in Great Britain" www.ias.org.uk

A comprehensive summary of definitions relating to alcohol use and abuse are provided at the end of this chapter.

Many Adults exceed recommended drinking levels and one in five drinks at hazardous levels

- In 2006, almost half (48%) of British men and 4 out of every 10 British women exceeded recommended daily guidelines on at least one day in the previous week.
- Similarly, British men and women aged 25 to 44 were more likely than other age groups to have drunk heavily on at least one day during the previous week, followed closely by those in the 16 to 24 age group.
- Individuals in managerial and professional occupations are more likely to have drunk alcohol in the previous week, and to drink more frequently than those in routine and manual occupations

- In 2008 one in every five of over 16's consumed alcohol at hazardous levels.
- Only 9 per cent of the White British population are non-drinkers, but the proportion is higher among some ethnic minority groups, rising to 90 per cent or more among those of Pakistani and Bangladeshi origin.

Alcohol consumption in young people has increased with heavy drinking and binge drinking a concern in this group and consumption among girls has been increasing rapidly.

Between 1990 and 2006, drinking in UK's 11-15 year olds roughly doubled from an average of around 5 units per week to around 11 units per week.

In addition to this there are proven links with risk taking behaviour which may result in:

- Teenage conceptions
- Sexually transmitted infections
- Mental health problems
- Alcohol related accident and injury
- Poorer school attendance and lower attainment
- Involvement in anti-social behaviour and crime

Alcohol without doubt causes disease and early death. It is a poison.

- In England in 2006, 16,236 people died from alcohol-related causes.
- The number of deaths from alcohol-related liver disease has almost doubled in the last decade.
- Alcohol causes cancers of the liver, bowel, breast, throat, mouth, larynx and oesophagus; it causes osteoporosis, reduces fertility and causes accidents of all kinds.
- Alcohol is responsible for around 950,000 unnecessary admissions to hospital nationally per year, and this is rising (an increase of 70% in the 6 years between 2002/03 and 2008/09).

Alcohol is getting cheaper and more easily available

- The real cost of alcohol has fallen: a unit of alcohol cost 67% less in 2007 than in 1987.

The health benefits of alcohol are overstated

- The potential health benefits of alcohol tend to be greatly overstated.
- Above the age of 40 years, drinking a small amount of alcohol may reduce the risk of heart disease and stroke.
- For those who drink above this low level, and for those under 40 years who drink any amount, alcohol **increases** the risk of heart disease and stroke.
- For those of any age, drinking any amount of alcohol increases the risk of cancer – there is no safe limit.
- Across England, alcohol results in over 13 people being admitted to hospital for every one that it prevents.

Alcohol damages the family and social networks

- Living with somebody who misuses alcohol can be a horrendous ordeal. Alcohol can make a partner's behaviour unpredictable, aggressive and erratic.
- Marriages in which one or both partners have an alcohol problem are twice as likely to end in divorce.
- British Crime Survey figures for 2007/08 suggest that 125,000 alcohol-related instances of domestic violence occurred over this one-year period.

Alcohol fuels antisocial behaviour and changes the character of our towns, especially in the evening at weekends

- Local Councillors have frequently stated their unease about the drinking culture apparent in towns across Oxfordshire, particularly among young people in the evening at weekends.
- Nationally, aggressive behaviour resulting from alcohol misuse, in particular binge drinking, is a major cause of street violence. The British Crime Survey found that almost half of the 2 million victims of violence thought that their attacker was under the influence of alcohol, with 39,000 reports of serious sexual assault also being associated with alcohol consumption.
- The effects of crime extend beyond those who are directly attacked, creating an environment of fear.

Alcohol damages front-line services and the economy and places a huge financial burden on the taxpayer.

- Half of all assaults on staff in hospital emergency departments are committed by those under the influence of alcohol.
- There are over 8,000 alcohol-related assaults on police officers every year in the UK.
- This makes it difficult to deliver community services in areas where staff feel threatened, demoralising front line healthcare staff and other professionals.
- One in every four accident and emergency attendances is related to alcohol
- The total cost to the NHS is estimated to be £2.7 billion per year and rising - almost double the cost in 2001 when the cost was £1.47 billion.
- At least 14-17 million working days are lost per year in the UK because of alcohol, costing up to £6.4 billion per year.
- The National Social Marketing Centre estimated that the total annual societal cost of alcohol misuse to the nation to be £55.1 billion.

In 2008 the Chief Medical Officer summed up the problem well:

“Drinking alcohol is a deeply ingrained part of our society; each year the average intake per adult is equivalent to 120 bottles of wine. Since 1970, alcohol consumption has fallen in many European countries but has increased by 40% in England.

The consequences of drinking go far beyond the individual drinker’s health and well-being. They include harm to the unborn foetus, acts of drunken violence, vandalism, sexual assault and child abuse, and a huge health burden carried by both the NHS and friends and family who care for those damaged by alcohol. “

The position in Oxfordshire:

Hospital admissions for alcohol related harm in Oxfordshire

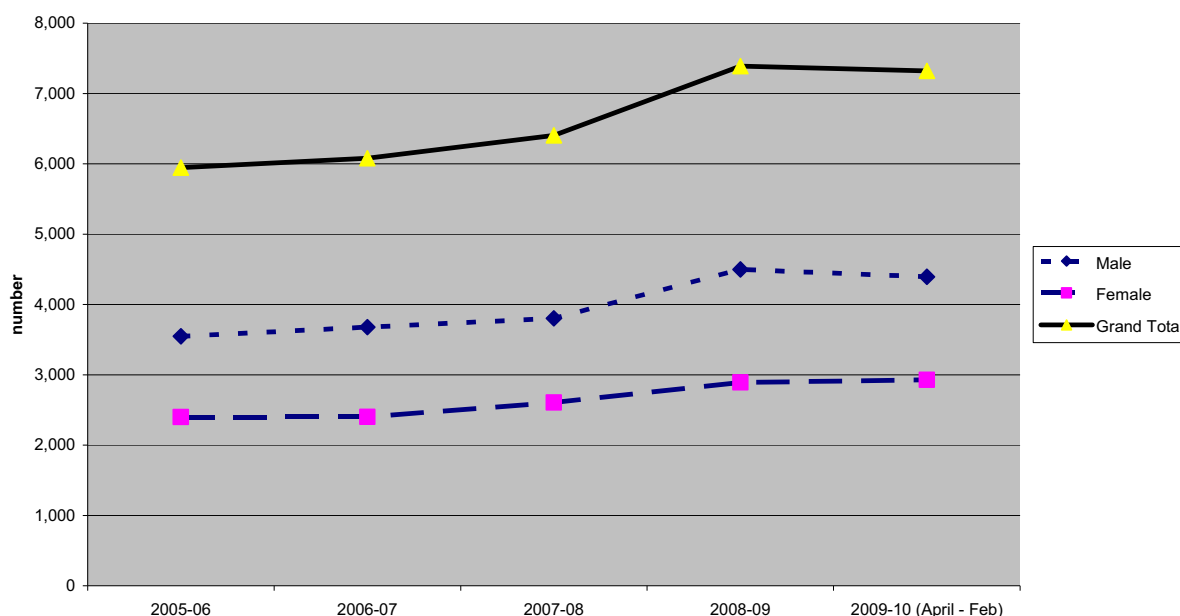
Local statistics show the burden of disease related to alcohol in Oxfordshire.

The graph below shows how hospital admissions due to alcohol related conditions have been rising steadily from 2005 to 2010. This calculation takes 5 common conditions and records the proportion of each one that is caused by alcohol.

The top five alcohol related illnesses are breast cancer or other related illness, heart rhythm problems, rectal cancer, heart disease related to artery deposits and other unspecified chest pain.

Figure 7.2

Total number of Hospital admissions in Oxfordshire for the top 5 alcohol related conditions (all ages), 2005-06 to 2009-10



Source: SUS (U-R) data analysed by Decision Support, NHS Oxfordshire April 2010

Self reported under-age drinking in Oxfordshire

The Big Voice survey was carried out in Oxfordshire between March 2008 and June 2009. An online survey was completed at school by almost 5000 young people aged 4 – 19 with additional on-street interviews for 16-19 year olds. This gave the following results which many may find shocking.

- 72% of young people aged over 11 have drunk alcohol,
- 9% regularly drink,
- 51% have been drunk
- 9% are regularly drunk.
- 5% agree that there is a lot of pressure to drink alcohol.

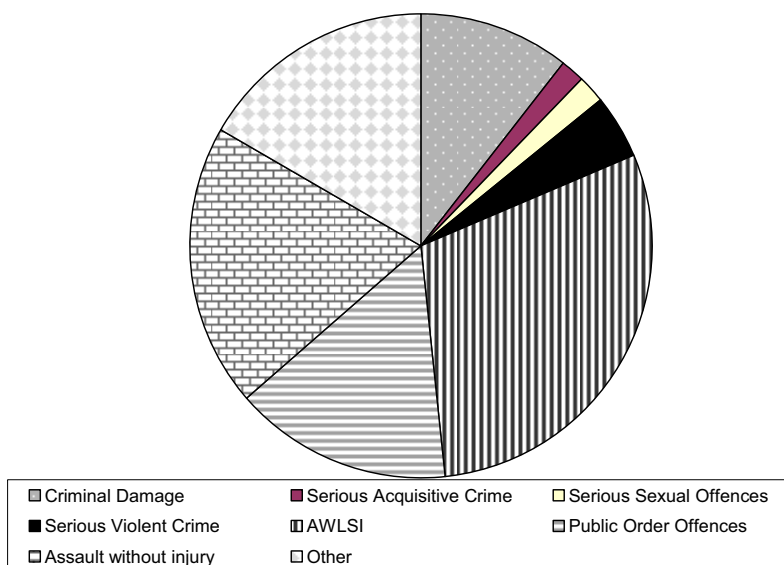
Under age sales of Alcohol in Oxfordshire

Police Licensing Teams and Trading Standards officers carry out checks of sales of alcohol to under age young people. Results of the police led operations in 2009-10 showed:

- 50 out of 207 premises tested sold alcohol to underage customers (24%)
- Over a third of these failed again when re-tested
- Seven premises were prosecuted for repeated failures

Figure 7.3: Alcohol related crime in Oxfordshire

Alcohol related crime in Oxfordshire 2009 - main crime types



Source: Thames Valley Police, March 2010 (Note – AWLSI stands for Assault with Less Serious Injury)

- **Over 11% of all crime in Oxfordshire last year was related to alcohol consumption**
- **This absorbs a substantial proportion of taxpayers' money spent on police services**
- Assaults make up the largest proportion of crimes which are committed under the influence of alcohol,
- Public order offences make up a high proportion of these crimes including being drunk and disorderly and using threatening words or behaviour. This behaviour often leads to other criminal behaviour including assault or the causing of criminal damage.

The cost of alcohol related crime can be estimated. For example, the crime figures from Oxfordshire last year indicate that:

- Alcohol related criminal damage cost approximately £4.5m (over 5,000 incidents at an indicative cost of £890 per incident)
- Violent assaults fuelled by alcohol in Oxfordshire cost approximately £1.5m (149 offences at an indicative cost of £10,409 each)
- Serious sexual offences linked to alcohol use cost approximately £3.1m (99 offences at an estimated cost of £31,438 each)

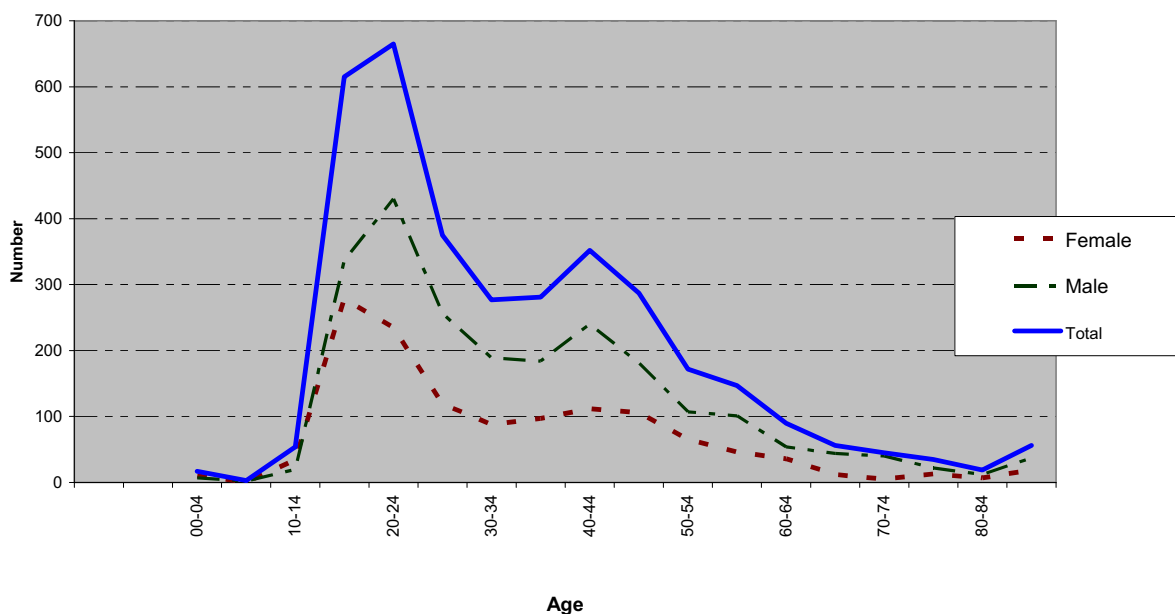
Accident and Emergency (A & E) attendances caused by alcohol in Oxfordshire

3,500 A and E attendances were related to alcohol in 2009/10. This is expensive to the taxpayer and inefficient for our services, especially when our emergency departments struggle to see patients within the national 4 hour standard. These 3,500 attendees mean longer waits for everyone. The predominance of young people and young adults, especially young men, is simply a reflection of the drinking culture society permits, aided by liberal licensing laws around opening times. In Oxford at the weekend it is easy to carry on drinking until 3 o'clock in the morning.

National statistics indicate that 70% of emergency admissions on a Friday and Saturday night are due to alcohol consumption.

Figure 7.4

Alcohol related attendance (suspected or confirmed) at Oxfordshire Emergency Depts, by age group and gender. 2009-10



Source: Data from Oxford Radcliffe Hospitals Trust, analysed by Decision Support, NHS Oxfordshire.

Ambulance call-outs related to crime and disorder incidents in Oxfordshire

The further cost of alcohol to society is reflected and is shown in ambulance call outs to crime and disorder incidents. One quarter’s data shows the pattern of activity, often focusing on built up areas in Oxford and Cherwell, resulting in 4,000 to 5,000 call outs a year.

The Oxford Nightsafe Partnership maps this data by location of the pick-up on a regular basis. They particularly look at the ambulance attendance where there is a record of assault / sexual assault, overdose / poisoning or stabbing or gunshot wounds. A high proportion of these pick-ups are made at licensed premises.

Table 7.1: Records of ambulance call outs to crime and disorder incidents in Oxfordshire July – Sept 2009

LA district	Month (2009)			
	Jul	Aug	Sep	Total
Cherwell	83	92	87	262 (21%)
Oxford	165	184	147	496 (41%)
South Oxfordshire	39	52	28	119 (10%)
Vale of White Horse	78	57	45	180 (15%)
West Oxfordshire	52	48	42	142 (12%)
Total	417	433	349	1199 (100%)

Source: South Central Ambulance NHS Trust (Oxfordshire)

Summary

The British Medical Association summed up the position well in 2008, and also criticised the effectiveness of our current national policies to control alcohol.

“Alcoholic beverages consumed in moderation are enjoyed by many. Although socially accepted, alcohol can be an addictive drug. Alcohol misuse can be harmful foremost to the individual but also places a substantial burden on families and society. The levels of alcohol-related disorder, crime, morbidity and premature mortality in the UK are

unacceptably high. Despite this, the strategy to reduce alcohol-related harm in the UK has seen an over-reliance on popular but ineffective policies, as well as liberalisation of the major drivers of alcohol consumption: availability and price. This represents a significant shortcoming in the political drive to improve public health and order.”

What are we doing about it?

Our current strategy is a good start and provides a solid foundation.

The Oxfordshire Alcohol Strategy 2008-11 has made a very good start. Put together by an impressively wide range of organisations, its key priorities are to:

- Reduce alcohol related disorder
- Increase the consistency and quality of alcohol awareness for all ages
- Develop key health initiatives and commission alcohol treatment
- Develop a balanced sustainable leisure economy for the benefit of all ages
- Reduce young people’s demand and supply of alcohol and its associated harms

This strategy is now due for renewal, and that gives us an opportunity to move forward faster.

Evidence of green shoots and good practice

New actions which have been carried out as part of this strategy include:

- A campaign to raise awareness of the safe drinking levels
- A wide range of organisations coming together including the police and ambulance services to keep our City and town centres safer at night time (the Nightsafe partnerships)
- Joining up work between the public health department and the John Radcliffe A and E Dept to follow up people with alcohol related injuries with the aim of reducing alcohol intake.
- Checks on shops selling alcohol to underage drinkers leading to successful prosecutions and greater awareness.
- A special theatre production for schools aimed at raising awareness of alcohol problems and limits called Last Orders.
- Brief Advice training for schools and Health Trainers (people working in the community to offer help on health issues to those who are the hardest to reach) so they are confident to raise the issue of drinking.
- A new alcohol treatment service procured by DAAT as mentioned above.
- Revising the Children and Young Peoples’ Plan to include better action plans which will bring more joined up action from a range of organisations
- Carrying out the Oxfordshire Voice Survey of alcohol consumption and attitudes showing that levels of awareness are quite high.

What should we do next?

The direction of travel on tackling alcohol issues is good and we need to build on this success. The focus of this work, our understanding of the issues and the delivery of initiatives have increased enormously in the last few years. From a position where tackling alcohol related harm was not “owned” by anyone we now have a shared vision and a plan which is being implemented by several partners. The Alcohol Strategy has brought people together and given leadership to this issue.

OPINION: A good start has been made to tackle alcohol issues in this county. Given the size of the threat posed, this topic should be given a higher priority in the County. The preparation of a revised County alcohol strategy is an opportunity to do this which should be seized.

How do we get there?

We have to be realistic. Some of the actions needed to change attitudes and behaviour in connection with alcohol have to be carried out at a national level. Campaigns, information and regulation are important. The debate will continue on whether the Government should set a minimum price for a unit of alcohol and many would say that tax is already high, but it is undeniable that price does have an influence on consumption.

We have to shift the emphasis to prevention and give people the right information to help them take responsibility for their health. It is only changes in individual behaviour that will lead to reductions in overall consumption and this disease.

We have to use 'brief advice'. Many professionals could take the opportunity to raise the issue of alcohol consumption and give brief advice if required. There is good evidence that this works. Early detection and increased awareness are the best tools in the prevention agenda. The role of GPs and primary care are crucial in this. This work should be stepped up and made consistent across the county.

Recommendation

The revision of the Alcohol Strategy in the next year will give a great opportunity for a further step-change. We need a strong strategy which should include the following key elements by March 2011.

1. Powerful and far reaching information about the potentially toxic effects of alcohol to health, community safety and family life that make it a personal issue for all of us.
2. Further reductions in alcohol related crime and disorder in our towns and City with targeted approaches and a firm resolve to enforce action against premises and people causing problems. This is a lead area for Nightsafe partnerships around the county who should continue to develop their role.
3. Joined up and effective advice and treatment services are needed, including in primary care. The NHS and Drug and Alcohol Action Team should work together to commission prevention and treatment services proportionate to the size of the issue.
4. Involvement of young people is essential in devising and rolling out campaigns and activities to tackle the youth drinking culture. This will need to be part of the planning carried out by the Children's Trust.
5. Enforcement of the law to prevent sales of alcohol to under 18s (or people buying it for them). Trading Standards and the Police Licensing Officers can work together to ensure consistent coverage on this issue across the county.
6. A comprehensive set of process and outcome measures should be set monitored and reported regularly so that the impact of this step change can be seen. This responsibility should fall to the Alcohol Strategy Group who should make sure their results are reported to the Health and Wellbeing Partnership and the Children's Trust as well as to the Community Safety Partnership
7. The Health Overview and Scrutiny Committee should consider scrutinising progress made as part of their work plan for 2011/12.

Alcohol: a note on terms used

Looking closely at the subject of Alcohol requires some special jargon. The key terms are defined in this box.

Unit

In the UK, alcoholic drinks are measured in units (10 millilitres (ml) of alcohol.) One unit of alcohol is about half a pint of ordinary strength beer, lager, or cider (3-4% alcohol by volume), or a small pub measure (25ml) of spirits (40% alcohol by volume). There are 1½ units of alcohol in a small glass (125ml) of ordinary strength wine (12% alcohol by volume). There is substantial variation in the measures used in bars and restaurants and measures poured in the home tend to be larger.

Recommended drinking guidelines

In the UK, it is recommended that men should not regularly drink more than three to four units per day, and women should not regularly drink more than two to three units per day. In terms of weekly limits, men are advised to drink no more than 21 units per week and women no more than 14 units per week i.e.:

- **for men**, an **average** per day of 1½ pints of beer, 3 shorts of spirits or 2 **small** glasses of wine
- **for women** an **average** per day of 1⅓ **small** glasses of wine, 2 shorts of spirits or 1 pint of beer

Harmful drinking: drinking that causes harm

Harmful drinking is a pattern of alcohol use that causes damage to physical and/or mental health. Harmful use commonly has adverse social consequences.

Hazardous drinking: drinking that puts the individual at risk of future harm

Hazardous drinking is a pattern of alcohol use that increases the risk of harmful consequences for the individual. In contrast to harmful drinking, hazardous drinking is of public health significance despite the absence of any current disorder in the individual use as it is likely to lead to future problems.

Heavy drinking: drinking in excess of what is considered moderate

A pattern of drinking that exceeds some standard of moderate drinking. In the UK, heavy drinking is defined as consuming eight or more units for men and six or more units for women on at least one day in the week.

Binge Drinking: heavy drinking in one session

Binge drinking is defined as drinking at twice the recommended levels or more in one session. This would be 8 or more units for men and 6 or more units for women in one go.

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Division(s): All

CABINET – 22 JUNE 2010

HOME TO SCHOOL TRANSPORT POLICY

Report by the Director of Children's, Schools and Families

Background

1. Oxfordshire County Council provides either free or subsidised transport to over 14,800 children and young people travelling to school or college. The legal basis for this provision of home to school transport is set out in sections 508A, 508B, 508C, 508D and 509AD and Schedule 35B of the Education Act 1996 (as amended by Part 6 of the Education and Inspections Act 2006) and where appropriate the Equality Act and English and European case law. Local authorities are also under a statutory duty to have regard to the Home to School Transport Guidance issued by the then DfES (now DfE) in 2007.
2. In 2009/10 the Home to School Transport budget was £16,051,210.
3. On 15 December 2009 the Council agreed to consult on possible changes to the discretionary elements within the Home to School Transport Policy. The decision to review these discretionary elements was made in the light of the current difficult financial situation, the continuing impact this will have on local government finances, and the need to ensure that the Home to School Transport Policy is equitable. Officers were asked to consult on proposals for a new policy and report back on the outcome of the consultation early enough for a new policy to take effect for 20011/12.
4. The consultation document stated that if the proposals were adopted there would be a phased introduction from September 2011. Those children for whom free or subsidised transport had been agreed before that date would not be affected by any policy changes. However, it was also explained that those receiving free transport on 'safe route' grounds would, as now, have this financial assistance withdrawn if the route is re-assessed as safe.
5. The proposed Home to School Transport Policy for 2011/12 is set out in Annex A.

Consultation

6. The following possible options for change were consulted upon:
 - (a) The phased ending of the automatic right to free and subsidised travel to faith schools. The consultation document explained that it was proposed still to have regard to any applications made on grounds of religion or belief but that the avoidance of unreasonable public expenditure would be taken into account when considering any application for assistance made on these grounds. It was further

explained that this was likely to lead to a more limited provision of transport assistance than that currently available. The current policy is inequitable since it provides greater support to one particular faith and within that faith greater support to those in a particular geographic area. The proposed new policy does not provide greater support to one faith than another and is therefore more equitable.

- (b) The phased ending of free travel for non-Oxfordshire residents to Chiltern Edge School. The consultation document explained that currently no neighbouring local authority provides free transport to any Oxfordshire residents and that Oxfordshire County Council is acting inequitably in providing assistance to children in part of Caversham while not providing assistance to non-Oxfordshire residents who live within the designated area of any other Oxfordshire school. The proposed new policy does not provide greater support to one group of non-Oxfordshire residents than another and is therefore more equitable.
- (c) The use of free school meals and maximum working tax credit (WTC) as the reasons for exemptions to the concessionary charge for transport. It was pointed out in the consultation document that the relevant parent in receipt of WTC would be the one with whom the child is ordinarily resident.
- (d) Setting the charges for concessionary and post 16 travel at the average commercial fare available at the 3 and 5 mile points.
- (e) Setting restrictions on the mileage allowance to ensure a fair and consistent approach.
- (f) Setting criteria for collaborative learning transport.

7. The consultation also included the following key provisos:

- (a) The phased introduction of any agreed changes from September 2011 to ensure that those children in receipt of free or subsidised transport prior to the introduction of any new policy would not be affected.
- (b) That the cost of Collaborative Learning Transport would be met from the budgets of 14-19 Partnerships and not the Home to School Transport Budget.
- (c) That the decisions regarding the provision of Collaborative Learning Transport should be made by the Partnerships (not the Admissions Team or the Integrated Transport Unit) using the agreed criteria, within cash limited budgets.

8. The consultation document is shown in full in Annex B.

9. On 17 December 2009 at the end of Term 2 a letter was sent to all schools that were likely to be affected alerting them to the County Council's intention to consult on a new Home to School Transport Policy, including the key proposals.
10. The consultation started at the beginning of Term 4 and on 23 February 2010 an item appeared in Schools News. In early March a further notification was sent out by Communications in a group e-mail message to all schools and on 9 March 2010 a reminder appeared in Schools News. Following a request from the Blessed George Napier School the consultation was extended to 26 April 2010 and schools were alerted to this through Schools News. The consultation document was on the public website from 23 February to 26 April 2010.
11. There were 52 responses to the consultation. Of these, 46 were from parents and 6 were from schools or an educational body. Of the parental responses, 41 were from the Bicester/Banbury area.
12. 50 of the responses included comments on the proposals on transport on faith grounds. No opposition to the changes in faith transport came from the area served by St Gregory the Great School. However, 42 comments were received expressing opposition to the proposal to end the current arrangements on faith transport from those living in the area served by the Blessed George Napier School. The table shown in Annex C gives a breakdown of the comments received on the proposals regarding free and subsidised transport provided on faith grounds. The Governors of Blessed George Napier School are particularly concerned by the proposed changes to faith transport and the effect they are likely to have on Catholic families and on the character of the school. This is the faith school that is likely to be most affected by the proposed changes and a statement from the Governors of the Blessed George Napier School, Banbury, setting out their reasons for opposing the proposed changes is attached as Annex D. If the proposed policy is adopted there is sufficient spare capacity in Bicester secondary schools to accommodate any likely increase in the number of children who will need places in the area.
13. The Headteacher of Chiltern Edge School expressed strong opposition to the proposal to end free transport for non-Oxfordshire residents to Chiltern Edge School. The Headteacher stated that he believed that the decision to review the transport arrangements for Chiltern Edge had a seriously destabilising effect on the likely roll for Chiltern Edge School. There were 180 places available in Year 7 at Chiltern Edge School and there are currently 118 children due to be admitted to this year group in September 2010. This prospective entry figure compares with a year group of 115 children in the current Year 7. There were no other comments regarding the ending of free transport for new entrants from the Caversham area of Reading to Chiltern Edge School. Currently no neighbouring local authority provides free transport to any Oxfordshire residents.

14. There were 4 comments from parents and 2 from schools opposing the use of free school meals and maximum working tax credit as the reasons for exemptions to the concessionary charge for transport.
15. There was 1 comment opposing the proposal on reimbursement of travel expenses.
16. 16 parents and 1 school and 1 educational professional opposed the proposal on Collaborative Transport.

Proposed New Policy

17. The proposed Home to School Transport Policy for 2011/12 has been modified to clarify how the local authority will make decisions on assistance with transport in response to the religious and philosophical convictions of parents. The proposed new policy states that any decision to provide assistance on these grounds would need to be compatible with the provision of efficient instruction and training and the avoidance of unreasonable public expenditure (as per para.134 of the Home to School Travel and Transport Guidance issued by the then DfES in 2007).
18. The proposed Home to School Transport Policy for 2011/12 meets current statutory requirements and corresponding statutory guidance.
19. The inequalities of the current policy were addressed in the consultation document and are referred to in this report. The proposed Home to School Transport Policy for 2011/12 removes these inequalities. In addressing these issues the proposed new policy will have an adverse impact on some families, for example those non Oxfordshire residents who live in Caversham and those Catholic families in the Bicester area who receive subsidised travel to the Blessed George Napier School. An Equality Impact Assessment has been completed in respect of the proposed new policy.

Financial Implications

20. Given that there would be a phased introduction of the proposed policy changes to transport provided on faith grounds the maximum savings related to secondary schools would be realised from September 2015 and for primary schools from September 2017. At current prices the proposals on faith transport would save a maximum of approximately £639,000 per annum from the academic year 2017/18.
21. Implementing the proposal on transport to Chiltern Edge School would, at current prices, save approximately £58,000 per annum from 2015/16.
22. Therefore at current prices the total possible savings per year amount to approximately £697,000 from 2017/18.

RECOMMENDATIONS

23. **It is RECOMMENDED that the Cabinet approves the proposed new Home to School Transport Policy, as set out in Annex A.**

MEERA SPILLETT
Director Children Young People and Families

Background Papers: Home to School Transport and Travel Guidance 2007

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June 2010

Proposed Home to School Travel Policy for 2011/12

Introduction

1. The County Council is keen to encourage young people to walk or cycle to school or college or to make use of public transport, but it also provides free transport and some assisted transport as set out in the Home to School Transport Policy set out in this document.
2. The legal basis for the provision of home to school transport is set out in sections 508A, 508B, 508C, 508D and 509AD and Schedule 35B of the Education Act 1996 (as amended by Part 6 of the Education and Inspections Act 2006) and where appropriate the Equality Act and English and European case law. In addition local authorities are under a statutory duty to have regard to the Home to School Transport Guidance issued by the then DfES (now DfE) in 2007.
3. The Home to School Transport Policy applies to young people who live in the County of Oxfordshire. Those who are not resident in Oxfordshire are advised to contact their own home local authority for details of any policy that their home authority may have regarding home to school/college transport.
4. Parents of those aged from 4 (Rising Five's) to 16 need to complete and submit a Transport Application Form if they wish to apply for free or subsidised home to school transport. If they wish to apply for subsidised travel an 'Application for Concessionary Travel on a School Bus' needs to be completed.
5. When, under the Home to School Transport Policy, children and young people are entitled to free transport it is provided by the most cost effective means. This will usually be by the provision of a free bus pass. However, where numbers are small children sometimes have to be transported by taxi. Where parents wish to take their children to school and it is therefore possible to avoid the provision of a taxi the Local Authority may agree to the payment of a mileage allowance. The mileage allowance is provided for the child's journey to school and the return to the child's home. Parents are not provided with a mileage allowance for their own return to home in the morning or their journey to the school in the afternoon, i.e. the LA pays a mileage allowance for two journeys per day rather than four. The mileage allowance is the Revenue and Customs All Car Rate (currently 40p). If through a change in circumstance¹ the payment of the mileage allowance proves no longer to be the cheapest way of transporting the child to school the alternative means of travel will be offered and the parent will be given up to 6 weeks to consider the new arrangement. At the end of that period

¹ For example if a taxi contract is awarded to transport another nearby child to the same school and there is a spare seat in the vehicle.

or when the alternative means of transport is taken up, whichever is the sooner, the mileage allowance will be withdrawn.

6. Where free or concessionary travel has been agreed it is provided for attendance at the beginning and end of the school day and not for extracurricular activities.
7. The responsibility for determining entitlement issues rests with the School Admissions Team since transport decisions relate to the school attended. The responsibility for organising transport rests with the Integrated Transport Unit.
8. Any information regarding Oxfordshire's Home to School Transport Policy obtained from any source other than the Admissions Team of Oxfordshire County Council or the Oxfordshire public website should be disregarded.
9. Buses and coaches used for home to school transport are public service vehicles and are subject to specific safety legislation. This is enforced by an initial inspection and certification of the vehicle followed by subsequent annual checks. Vehicles are also subject to random roadside checks undertaken by the 'Vehicle and Operator Service Agency' (VOSA). VOSA are able to prohibit any vehicle that is non-compliant, i.e. is in a dangerous condition, not roadworthy and/or the driver's hours are irregular. Any Service Provider using sub-standard vehicles may lose their operator's licence.

Statutory Walking Distance

10. In understanding home to school transport and what can and cannot be provided free of charge it is important to understand what is referred to as "the statutory walking distance". This is 2 miles for children who are under 8 years of age, and 3 miles for those of statutory school age who are 8 and over. It is measured along the shortest route along which a child, accompanied by a responsible adult, may walk with reasonable safety. The route may include footpaths, bridleways, and other pathways, as well as recognised roads. All such routes need to be open to the public. When there are issues raised over the possible safety of a walking route the Admissions Team will arrange for an initial assessment by the Integrated Transport Unit and if necessary a full risk assessment by Road Safety.

Distance Measuring for Free Transport for Children of Low Income Families

11. The 2 mile limit is measured in the same way as the "statutory walking distance". However, the 6 mile and 15 mile upper limits are not walking routes. They are measured along routes that are passable using a road route suitable for motorised vehicles.

Home

12. A child's home is considered to be the child's main place of residence during the normal school week. Free transport can only be provided from that one address.

Travel to a Friends Home

13. No seat can be provided on an ad hoc basis to children wishing to travel to the homes of children who are entitled to free transport.

Escorts

14. Escorts are normally only provided when it has been established through the assessment or review process that a child with a Statement of Special Educational Needs has a specific need to be accompanied.
15. Escorts will not normally be provided in any other circumstances.

Parents accompanying children in OCC transport

16. Parents will not normally be able to travel in OCC provided transport.

Assessment of Eligibility for Free Transport on Admission to Primary or Secondary School

17. An assessment of eligibility for free transport is made as part of the normal admissions process for entry to school. Parents are normally notified of the decision in the letter offering a school place.
18. If a child ceases to be eligible during the course of the school term, for example due to moving address, the provision should cease at the end of that term.

Free transport for those of school age (F1 to Year 11)

19. Children within the following categories are eligible for free transport:
 - a. Children attending the designated (catchment) school for their address if the distance from home to school is over the “statutory walking distance” of 3 miles if 8 or over or 2 miles if less than 8 and of statutory school age. This applies whether or not the school was listed on the Common Admissions Preference Form (admissions application form).
 - b. Children attending the nearest available school or educational placement to their address, if the distance from home to school is over the “statutory walking distance” of 3 miles if aged 8 or over or 2 miles if less than aged 8 and of statutory school age. This applies whether or not the school was listed on the Common Admissions Preference Form (CAPF).
 - c. Children who are aged 8 or over and are under 11 years old who are eligible for Free School Meals or whose parents are in receipt of the maximum level of Working Tax Credit and attend the nearest school if it is over 2 miles from their home.

- d. Children aged 11 to 16 who are eligible for Free School Meals or whose parents are in receipt of the maximum level of Working Tax Credit and who attend one of their three nearest suitable schools (or places other than school at which they might receive education under section 19(1) of the Education Act 1996), where they live more than two but not more than 6 miles from that school. The 2 mile distance is measured by “walking route” and the 6 mile distance is measured by road route.
- e. Children attending the nearest available school to their address even if it is less than the statutory walking distance, if it would not be safe for a child accompanied by an adult to walk from the home to the school. This applies whether or not the school was listed on the CAPF. If the route is subsequently determined to be safe the free transport will be withdrawn after the parent will be given up to 6 weeks to consider the new arrangement. At the end of that period or when the alternative means of transport is taken up, whichever is the sooner, the mileage allowance will be withdrawn.
- f. Children aged 11 to 16 who are eligible for Free School Meals or whose parents are in receipt of the maximum level of Working Tax Credit and want their child to be educated in accordance with their religion or belief and they attend the nearest suitable school preferred on grounds of religion or belief that is over 2 miles but no more than 15 miles from their home. The 2-mile distance is measured by “walking route” and the 15-mile distance is measured by road route.
- g. Children entitled to free transport who then move house during Year 11 and continue to attend their original school subject to the following limits:
 - i. Transport can be provided other than by taxi
 - ii. The distance travelled is no more than 15 milesTaxis will only be used in exceptional circumstances.
- h. Children with a disability who do not have a Statement of Special Educational Need who by reason of their disability are unable to walk even relatively short distances to school and children with a mobility problem caused by a temporary medical condition, for example a broken leg. This assistance is subject to confirmation of the medical reasons for the provision by a GP or consultant.
- i. Children with a Statement of Special Educational Needs where one of the following applies:
 - (i) The school attended is the nearest suitable school or educational placement to their address that has an available place, if the distance from home to school is over the

“statutory walking distance” of 3 miles if aged 8 or over or 2 miles if less than aged 8 and of school age.

- (ii) The school attended is the nearest suitable school or educational placement to their address that has an available place and the distance from home to school is less than the distances set out in h(i) but it would not be safe for a child accompanied by an adult to walk from the home to the school.
- (iii) The children concerned are unable to walk to school by reason of their special educational need or, if disabled, their disability or because of a temporary or long term medical condition. Evidence is required from a GP or consultant.

Free Travel to Out County Residential Schools for those with Special Educational Needs

Out County Weekly Boarding

- 20. The beginning and end of each term of each school week to a total of 76 single journeys per year.

Termly Boarding (3 terms per year)

- 21. Children of 11 or over are entitled to free travel at the beginning and end of each term and half term up to a maximum of 16 single journeys per year.
- 22. Children aged up to 11 are entitled to free travel at the beginning and end of each term and half term, plus 4 discretionary journeys home per year, up to a maximum of 24 single journeys per year.

Termly Boarding (4 terms per year)

- 23. Children of 11 or over are entitled to free travel at the beginning and end of each term and half term up to a maximum of 16 single journeys per year.
- 24. Children aged up to 11 are entitled to free travel at the beginning and end of each term and half term, plus 4 discretionary journeys home per year, up to a maximum of 24 single journeys per year.

Out County 52 Week Boarding (joint placement with other agency)

- 25. All boarders (or parents) are entitled to 12 single trips home per year (broadly relating to term times). Any additional trips will be the responsibility of the other agency.

Payment of parental journeys for those with children at out county residential special schools

- 26. Payment will be made if one of the following applies:

- a. Attendance at their child's annual review
- b. Attendance at any meeting called by the LA at the pupils school
- c. Journeys necessitated by a child's sickness or emergency medical appointments
- d. An agreed journey to visit a new school placement
- e. To attend up to three additional meetings per year at the school (called by the school or requested by the parents) if sanctioned by the LA in advance.

Overnight Accommodation

27. The LA will not normally reimburse the cost of overnight accommodation for parents/carers.

Applications for Transport Assistance on Grounds of Religion and Belief

28. In making decisions on assistance with transport the LA will respect parents' religious and philosophical convictions as to the education to be provided for their children in so far as this is compatible with the provision of efficient instruction and training and the avoidance of unreasonable public expenditure (as per para.134 of the Home to School Travel and Transport Guidance issued by the then DfES in 2007).
29. However, a parent will need to satisfy the LA of the genuine nature of the religious and/or philosophical belief and that the application is made in good faith. The burden of proof lies with the child's parent/parents.
30. Examples of acceptable evidence are:
 - a. The provision of a baptismal certificate.
 - b. A statement of atheism.
 - c. A statement of adherence to a particular faith.
 - d. A letter of support from a priest or rabbi stating that the child belongs to a particular congregation.

Normally two pieces of evidence will be required.

31. It is important to note that the LA will take into account the financial consequences of any applications for assistance and that setting up new coach services or taxi routes or specifically continuing them when they could be discontinued in order to accommodate new travellers would normally fall within the definition of "unreasonable public expenditure". However, where there are spare seats on already existing home to school transport routes, or scheduled public transport services, the LA will be able to consider applications for places under the concessionary travel arrangements.
32. The LA will not take into academic grounds for preferring a particular school when making a decision on whether to provide assisted transport on grounds of faith or belief.

33. Decisions on applications for transport assistance on grounds of faith or belief will normally be taken by a panel of three. The chairman will normally be the Service Manager for Admissions.

16-19 Home to School/College Transport

Annual 16 to 19 Transport Policy Statement

34. Details of travel provision for the 16 to 19 age group will be published by 31 May of each year in the 16-19 Transport Policy Statement. This is intended to ensure that young people can make informed choices regarding post-16 education. The Policy Statement can be amended in year in response to complaints or a direction from the Secretary of State. Complaints can be heard by the Appeals Sub-Committee of the Democratic and Organisation Committee (DOC).

Free Travel

35. Students with learning difficulties and/or disabilities who are beyond statutory school age and who are aged 16 to 19, will receive free travel to that placement when they attend the nearest suitable school or educational placement to their home address that has an available place and one of the following applies:
- a. It is over 3 miles from their home to the educational placement.
 - b. It is less than 3 miles from their home to the educational placement but it would not be safe for the young person, even if accompanied by an adult, to walk from home to that placement.
 - c. The young person is unable to walk to the school or educational placement due to their learning difficulty and/or disability, or because of a temporary or long term medical condition. Evidence is required from a GP or consultant.

Subsidised Travel (16-19 age group)

36. Students who do not have learning difficulties and/or disabilities who are beyond statutory school age, are aged 16 to 19, and who attend either a college or a school may use the concessionary travel scheme where it is necessary to enable them to access the designated school or college for their area (lower concessionary charge payable) or to access a non-designated area school or college (higher concessionary charge payable). The concessionary travel scheme makes places available on transport provided for those who are eligible for free home to school transport.
37. Oxfordshire residents aged 16-19 living within the catchment area of Henley College will continue to be eligible for subsidised travel to that college if the college is over 3 miles or if there is no safe walking route

(lower concessionary charge payable). The latter charge will be reviewed on an annual basis.

38. In exceptional circumstances, and only where places on relevant home to school transport routes are unavailable, season tickets on public transport may be provided for travel to the designated college or school from the student's home address at the relevant concessionary charge rate. This is meant to apply where a home to school transport route is full and it would be possible to use public transport and so avoid the unnecessary additional public expense of contracting for additional capacity on that route.

Travel Arrangements for Learners with Learning Difficulties Assessments (aged 19-24)

39. An annual Learning Difficulties and Disabilities Transport Policy Statement will be issued by the LA either with the 16-19 Transport Policy Statement or separately. This document will specify any transport or other arrangements, any payment of travel expenses and concessionary schemes which the LA plans to make available to this group of learners in the following academic year to publication. The Policy Statement will also set out the arrangements for facilitating boarding provision outside both the further education and higher education sectors. Complaints can be heard by the Appeals Sub-Committee of the Democratic and Organisation Committee (DOC).

The Concessionary Travel Scheme

40. Concessionary seats are spare seats on home to school transport routes. These are routes that are operated for the benefit of those who are entitled to free transport to and from school. The key points regarding this scheme are set out below:
 - a. The Council cannot guarantee that a young person will keep the seat for longer than two terms
 - b. Fare prices are reviewed annually
 - c. The parent, or in the case of Years 12 and 13 must complete an application form for concessionary travel
 - d. Parents are required to pay for two terms travel in advance
 - e. The price charged covers a return journey for every school day of the relevant period
 - f. There will be no rebates for those deciding to travel for less than the maximum number of possible journeys per term, for example there is no rebate if a young people decides to use his/her bus pass for morning travel and returns by some other private means in the afternoon

- g. If a seat is available a bus pass will only be issued on receipt of a completed application form, and correct payment
- h. No guarantee can be given that the bus will continue to run throughout a young person’s time at a school, or that the place on the bus will not be withdrawn at some future date if the place is required for a young person who is entitled to free travel
- i. The concessionary charge will be waived for those eligible for Free School Meals or for those whose parents are in receipt of the maximum level of Working Tax Credit
- j. When there are more requests to pay for seats on a particular route than there are seats available they will be allocated in the descending order of priority shown in Table 5.

Table 5. Priority for Concessionary Places

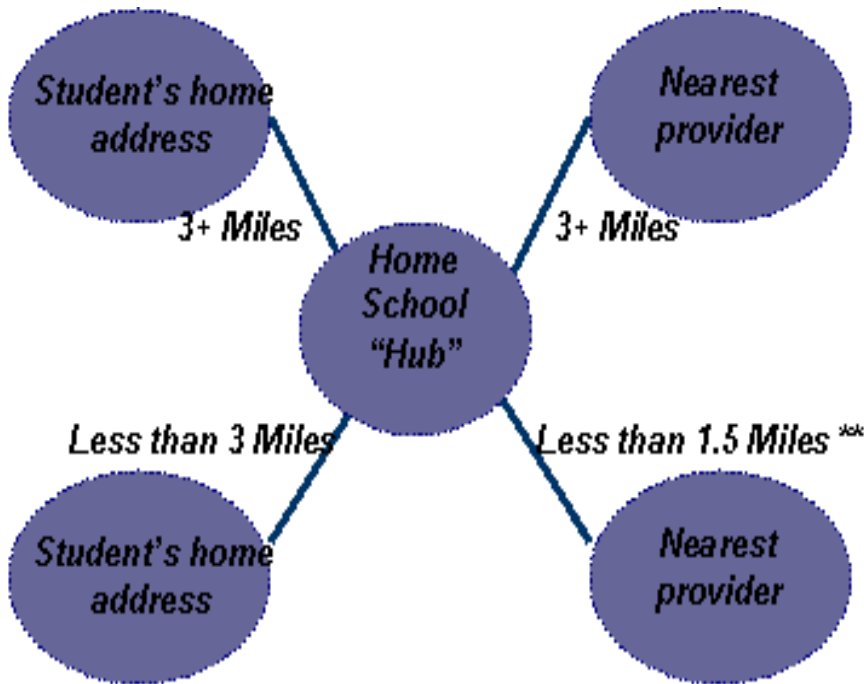
Priority	Category
1.	Those with a Statement of Special Educational Needs naming the school
2.	Looked After Children
3.	Years 12 and 13
4.	Children in receipt of Free School Meals or whose parent/parents are in receipt of the maximum of Working Tax Credit
6.	Those who travelled on the route the previous term
7.	By year group, in ascending order of priority from F1 to Year 11
8.	Those living closest using the shortest designated public route on the County Council’s Geographic Information System

Collaborative Learning Transport

- 41. The cost of collaborative learning transport is met from the budgets of 14-18 Partnerships, not the Home to School Transport Budget and decisions on provision will be made by those Partnerships.
- 42. Transport assistance to access collaborative learning opportunities is determined by distance as set out below:
 - a. Any arrangement applies to the nearest provider of that course
 - b. If a single journey from the home school to the nearest course provider is over 3 miles then transport will be provided

- c. If journey from home to home school is less than 3 miles but the distance from the home school to the nearest provider is over 1.5 miles then transport will be provided from home school to the provider only
 - d. If the distance from the student's home to school is over 3 miles but the distance from the home/school to the nearest provider is less than 1.5 miles (safe/reasonable walking distance) then transport will not be provided to continue on to the provider
 - e. If a pre-existing route from the child's home to their nearest provider is available then a place may be offered on that transport if the distance is over 3 miles (with the consortium paying for concessionary places). If the distance is less than 3 miles and a concessionary place is available the student must apply and pay as set out in the Home to School Transport Policy
 - f. If a course runs over 2 hours of the normal school day then transport will be provided to the child's home but only if that child is living over 3 miles from their home school.
43. Diagram 1 illustrates how the Home to School and Collaborative Learning Transport Policy would affect the normal journey for a student to their nearest provider.

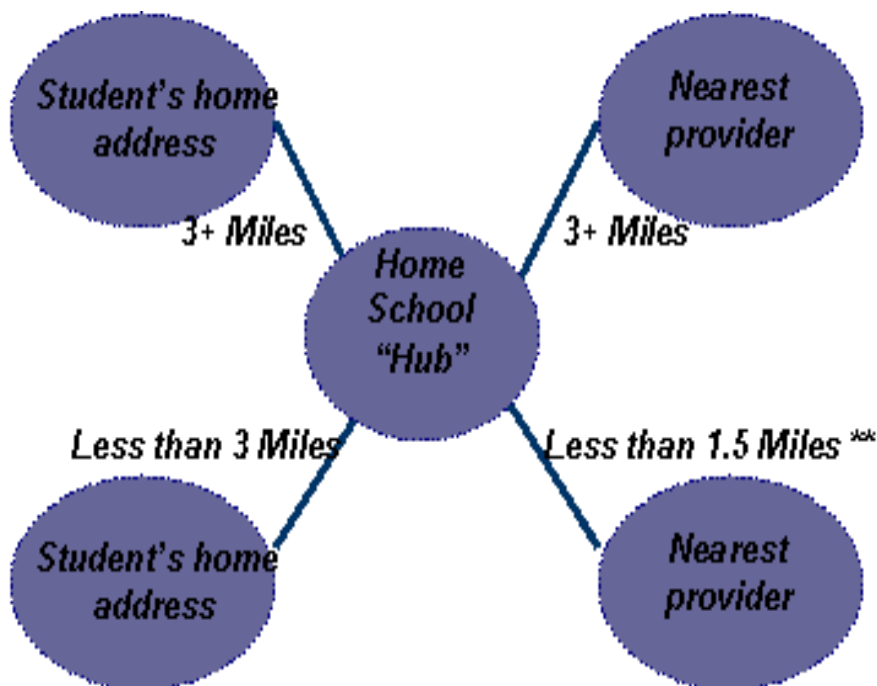
Diagram 1
"Hub & Spoke"
Journey Criteria Model A



*** If this journey is greater than 1.5 miles then transport would be provided on the grounds that it is not a reasonable journey time.*

44. Diagram 2 illustrates when a student would not normally be eligible for transport but a seat on a concessionary bus route is available from close to their home address to the nearest provider. If the journey is over 3 miles the relevant consortium may apply for and pay for the seat. If the journey is less than three miles then it would be the responsibility of the parent to apply and pay for the seat.

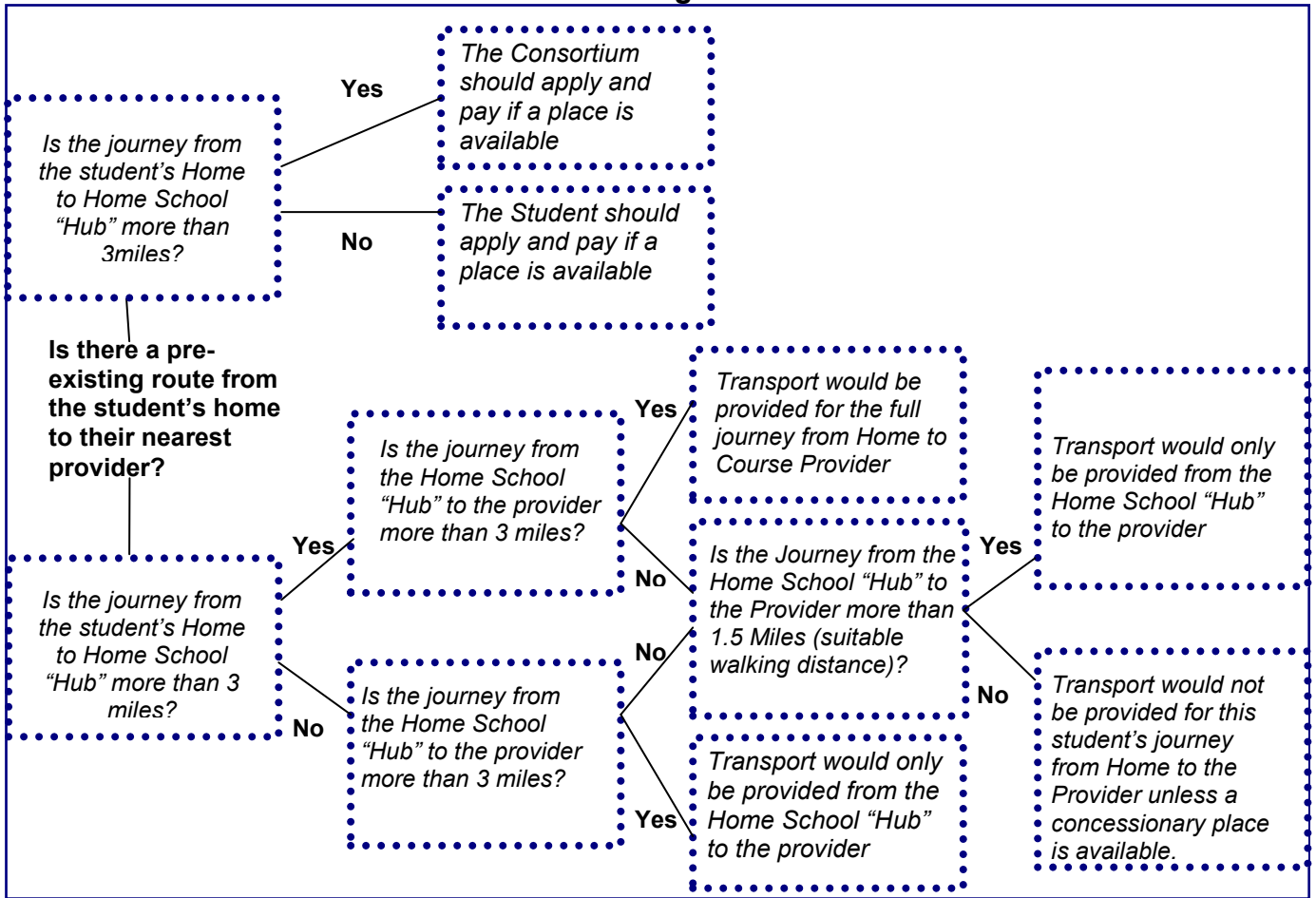
**Figure 2
Concessionary Travel
Journey Criteria Model B**



*** If this journey is greater than 1.5 miles then transport would be provided on the grounds that it is not a reasonable journey time.*

45. Diagram 3 expresses the criteria in a flow diagram.

**Diagram 3
Flow Diagram**



Transport Appeals

46. Parents can request an appeal to the Appeals Sub-Committee of the Democratic and Organisation Committee (DOC) regarding decisions taken by officers within the Admissions Team or the Integrated Transport Unit should they have cause for complaint or disagreement concerning the eligibility of their child for travel support.
47. The Clerk to the Appeals Sub-Committee will not be a member of the Admissions Team or the Integrated Transport Team.
48. The Appeals Sub-Committee hearings will be organised as soon as possible following the request from parents to lodge an appeal. The timing of the appeal will depend upon the availability of councillors.
49. A representative of the Admissions Team will present the LA's reasons for not providing transport and appellants can present a case in writing and /or in person (if the parent wishes, accompanied by a friend). The format of the appeal is set out below:
 - a. Presentation of the LA's case by the LA representative

CA10

- b. Committee members and the parent are able to ask questions of the LA representative
 - c. Presentation of the parent's case
 - d. Summing up by the LA representative
 - e. Summing up of the parents case
 - f. Both the LA representative and the parent/parents friend leave the hearing together.
 - g. Consideration of the case by the Appeals Sub-Committee
 - h. The Appeals Sub-Committee makes a decision as to whether to uphold or refuse the appeal
50. The decision of the Appeals Sub-Committee will be considered binding by the LA and there is no further right of appeal.
51. The LA will not consider requests for a further transport appeal within the school year unless there has been a significant change of circumstance.

Consultation Document on Home to School Transport

January 2010

Introduction

Oxfordshire County Council provides either free or subsidised transport to over 14,800 children and young people travelling to school or college. The legal basis for this provision of home to school transport is set out in sections 508A, 508B, 508C, 508D and 509AD and Schedule 35B of the Education Act 1996 (as amended by Part 6 of the Education and Inspections Act 2006) and where appropriate the Equality Act and English and European case law. In addition local authorities are under a statutory duty to have regard to the Home to School Transport Guidance issued by the then DfES (now DCSF) in 2007.

Oxfordshire expects to spend approximately £16.5 million on home to school transport in 2009/10.

On 15 December 2009 the County Council agreed to consult on possible changes to the discretionary elements within the Home to School Transport Policy. The decision to review these discretionary elements was made in the light of the current difficult financial situation in the UK, the continuing impact this will have on local government finances, and the need to ensure that the Home to School Transport Policy is equitable. Officers were asked to consult on proposals for a new policy and report back on the outcome of the consultation early enough for a new policy to take effect in 20011/12. The following possible options for change are shown below:

1. The phased ending of the automatic right to free and subsidised travel to faith schools. It is proposed to still have regard to any applications made on grounds of religion or belief but this is intended to be a more limited provision of transport assistance (Proposals 1 and 2).
2. The phased ending of free travel for non-Oxfordshire residents to Chiltern Edge School (Proposal 3).
3. Using free school meals and maximum working tax credit as the reasons for exemptions to the concessionary charge for transport (Proposal 4). Wherever the consultation document refers to 'whose parents are in receipt of the maximum level of Working Tax Credit', the relevant parent in receipt of WTC is the one with whom the child is ordinarily resident.
4. To set the charges for concessionary and post 16 travel at the average commercial fare available at the 3 and 5 mile points (Proposal 5).
5. Restrictions on the mileage allowance (Proposal 6).
6. Establishing criteria for collaborative learning transport

There will be a phased introduction of any agreed changes from September 2011. Those children for whom free or subsidised transport has been agreed before that date will not be affected by any policy changes. Those receiving free transport on safe route grounds will, as now, have this financial assistance withdrawn if the route is re-assessed as safe.

The cost of collaborative learning transport is met from the budgets of 14-19 Partnerships, not the Home to School Transport Budget, and decisions on provision will be made using the agreed criteria within cash limited budgets. The Partnerships and not the Admissions Team or the Integrated Transport Unit will be responsible for applying the criteria.

It would be helpful if any comments could be made on the form attached at Appendix 1 which should be returned to:

The Admissions Team
County Hall
New Road
Oxford
OX1 1ND
Telephone: 01865 815175
Fax: 01865 783198
E-mail: admissions.schools@oxfordshire.gov.uk

It would be particularly helpful if comments could be sent as an e-mail attachment.

The consultation closes on 1 April 2010.

Section 1

The Current Home to School Transport Policy

Free transport is provided in the following circumstances:

1. Children attending the nearest suitable school or educational placement to their address that has an available place, if the distance from home to school is over the “statutory walking distance” of 3 miles if aged 8 or over 2 miles if less than aged 8 and of school age. This applies whether or not the school was listed on the Common Admissions Preference Form (CAPF).
2. Children who are aged 8 or over and are under 11 years old who are eligible for Free School Meals or whose parents are in receipt of the maximum level of Working Tax Credit and attend nearest suitable school or educational placement to their address that has an available place if it is over 2 miles from their home.
3. Children attending the nearest suitable school or educational placement to their address that has an available place even if it is less than the statutory walking distance, if it would not be safe for a child accompanied by an adult to walk from the home to the school. This applies whether or not the school was listed on the CAPF.
4. Children aged 11 to 16 who are eligible for Free School Meals or whose parents are in receipt of the maximum level of Working Tax Credit and who attend one of their three nearest suitable schools (or places other than school at which they might receive education under section 19(1) of the Education Act 1996), where they live more than two but not more than 6 miles from that school. The 2 mile distance is measured by “walking route” and the 6 mile distance is measured by road route.
5. Children aged 11 to 16 who are eligible for Free School Meals or whose parents are in receipt of the maximum level of Working Tax Credit and want their child to be educated in accordance with their religion or belief and they attend the nearest suitable school preferred on grounds of religion or belief that is over 2 miles but no more than 15 miles from their home. The 2 mile distance is measured by “walking route” and the 15 mile distance is measured by road route.
6. Children with a disability who do not have a Statement of Special Educational Need who by reason of their disability are unable to walk even relatively short distances to school and children with a mobility problem caused by a temporary medical condition, for example a broken leg. This assistance is subject to confirmation of the medical reasons for the provision by a GP or consultant.
7. Children originally entitled to free transport that move house during Year 11 and continue to attend their original school subject to the following limits:

- a. Transport can normally be provided other than by taxi
 - b. The distance travelled is no more than 15 miles.
8. Children attending the designated (catchment) school for their address if the distance from home to school is over the “statutory walking distance” of 3 miles if 8 or over or 2 miles if less than 8 and of school age. This applies whether or not the school was listed on the Common Admissions Preference Form (admissions application form). The designated school for a particular address is not always the nearest school to that address, if it is there would be a statutory entitlement to free transport.
9. Children attending their nearest available maintained faith school on grounds of faith if the distance from home to school is:
- a. More than 2 miles but less than 6 miles for children of school age who are less than 8 years old.
 - b. More than 3 miles but less than 10 miles for children aged 8 or over and of statutory school age.

The above measurements are based on walking routes.

There is a proposal to discontinue this provision.

10. Children who are non-Oxfordshire residents who live in the part of the Caversham area of Reading that is within the designated area for Chiltern Edge School, if the distance from home to school is more than 3 miles.

There is a proposal to discontinue this provision

11. Children with a Statement of Special Educational Needs where one of the following applies:
- a. The school attended is the nearest suitable school or educational placement to their address that has an available place, if the distance from home to school is over the “statutory walking distance” of 3 miles if aged 8 or over or 2 miles if less than aged 8 and of school age.
 - b. The school attended is the nearest suitable school or educational placement to their address that has an available place and the distance from home to school is less than the distances set out in 11a, but it would not be safe for a child accompanied by an adult to walk from the home to the school.
 - c. The children concerned are unable to walk to school by reason of their special educational need or, if disabled, their disability or because of a temporary or long term medical condition. Evidence is required from a GP or consultant.

12. Post 16 students with learning difficulties and/or disabilities who attend the nearest suitable school or educational placement to their address that has an available place when one of the following applies:
- It is over 3 miles from their home.
 - It is less than 3 miles from their home to the educational placement but it would not be safe for the young person, even if accompanied by an adult, to walk from home to the placement.
 - The young person is unable to walk to the school or education placement due to their learning difficulty and/or disability, or because of a temporary or long term medical condition. Evidence is required from a GP or consultant.

Subsidised travel

13. Oxfordshire residents aged 16-19 living within the catchment area of Henley College are eligible for subsidised travel to that college and are currently subject to a charge of £240. The latter charge is reviewed on an annual basis.
14. Post 16 students who do not have learning difficulties and/or disabilities who attend either a college or a school may use the concessionary travel scheme where it is necessary to enable them to access the designated school or college for their area (lower charge payable) or to access a non designated area school or college (higher charge payable). The concessionary travel scheme makes places available on transport provided for those who are eligible for free home to school transport.
15. Catholic pupils attending the Blessed George Napier School, Banbury, who live more than 10 miles from the school and are resident in one of the parishes shown in Table 1. There is a proposal to discontinue this provision.

Table 1. Subsidised Travel to The Blessed George Napier School

Chipping Norton Area	Bicester Area
Rollright	Cottisford
Chastleton	Hethe
Cornwell	Fringford
Over Norton	Stratton Audley
Salford	Godington
Chipping Norton	Middleton Stoney
Kingham	Bucknell

Churchill	Caversfield
Sarsden	Bicester
Chadlington	Launton
Spelsbury	Chesterton
Heythrop	Wendlebury
Enstone	Merton
	Adderbury
	Blackthorn
	Arcott

16. The fare charged is the lowest fare available under the concessionary travel scheme, currently £80 for two terms (£240 per annum). The details of the concessionary fares scheme are set out below.
17. The provision of a concessionary fares scheme that enables any spare seats on home to school routes to be made available at subsidised rates to children with no entitlement to free travel. Under current practice parents who are receiving one of the benefits set out in Table 2 do not have to pay the relevant charge.

Table 2. Exemption from the Concessionary Charge

Serial	Benefit
a.	Income support
b.	Free school meals
c.	Council Tax Benefit
d.	Housing Benefit

18. If there are fewer concessionary places than there are applicants they are allocated in the priority order shown in Table 3.

Table 3. Priority for Concessionary Places

Priority	Category
1.	Those with a Statement of Special Educational Needs naming the school
2.	Looked After Children
3.	Students in receipt of benefit who live under the statutory walking distance (places will be allocated by year group and in date order of the application being received)
4.	Students in receipt of benefit who live outside the

	designated area (places will be allocated by year group and in date order of the application being received)
5.	Students who live under the statutory walking distance (places will be allocated by year group and in date order of the application being received)
6.	Students who live outside the designated area (places will be allocated by year group and in date order of the application being received)

19. If there are insufficient places within one of the categories listed in Table 5 seats are allocated according using the following priority order:

1. Students in Year 11
2. Students in Year 13
3. Students in Year 7
4. Students in Year 8
5. Students in Year 9
6. Students in Year 10
7. Students in Year 12

20. Waiting lists are used when all seats on a vehicle have been allocated. Children in Public Care take priority and all other applications are allocated in date order of receipt at the Integrated Transport Unit.

21. Current charges payable under the concessionary fares scheme are shown in Table 3.

Table 3. Charges 2009/10

<i>Pre 16 Charges</i> Under 3 miles	£ 240 per annum (£80 per 2 terms)per two terms
Over 3 miles	£447 per annum (£149 per two terms)
<u>Post 16 Charges</u> Designated area school or college	£ 240 per annum (£80 per 2 terms)per two terms
Non designated	£447 per annum (£149 per two terms)

area school or college	
------------------------	--

Escorts

22. Escorts are normally only provided when it has been established through the assessment or review process that a child with a Statement of Special Educational Needs has a specific need to be accompanied.
23. Escorts will not normally be provided in any other circumstances.

Free Travel to Out County Residential Schools for those with Special Educational Needs

Weekly Boarding

24. The beginning and end of each term of each school week to a total of 76 single journeys per year.

Termly Boarding (3 terms per year)

25. Children of 11 or over are entitled to free travel at the beginning and end of each term and half term up to a maximum of 16 single journeys per year.
26. Children aged up to 11 are entitled to free travel at the beginning and end of each term and half term, plus 4 discretionary journeys home per year, up to a maximum of 24 single journeys per year.

Termly Boarding (4 terms per year)

27. Children of 11 or over are entitled to free travel at the beginning and end of each term and half term up to a maximum of 16 single journeys per year.
28. Children aged up to 11 are entitled to free travel at the beginning and end of each term and half term, plus 4 discretionary journeys home per year, up to a maximum of 24 single journeys per year.

52 Week Boarding (joint placement with other agency)

29. All pupils (or parents) are entitled to 12 single trips home per year (broadly relating to term times). Any additional trips will be the responsibility of the other agency.

Payment of parental journeys for those with children at out county residential special schools

30. Payment will be made if one of the following applies:
 - a. Attendance at their child's annual review
 - b. Attendance at any meeting called by the LA at the pupil's school

- c. Journeys necessitated by a child's sickness or emergency medical appointments
- d. An agreed journey to visit a new school placement
- e. To attend up to three additional meetings per year at the school (called by the school or requested by the parents) if sanctioned by the LA in advance.

Overnight Accommodation

- 31. The LA will not normally reimburse the cost of overnight accommodation for parents/carers.

Section 2

Proposed Changes

Proposal 1

A phased ending of:

- a. **Free travel to faith schools**
- b. **Subsidised travel on faith grounds for children who live more than 10 miles from the school and are resident in one of a series of parishes (listed in Table 3) in the Chipping Norton and Bicester areas to the Blessed George Napier School, Banbury**

Currently 274 children receive free transport to a faith school. In addition 291 children receive subsidised travel. This gives a total of 565 children receiving free or subsidised travel on faith grounds. None of these children would be affected by the proposed change, which would only apply to those due to start at the schools concerned from September 2011.

There are also 7 children who receive free transport to a faith school because it is the nearest school to their address with an available place. This is a statutory entitlement to free travel and is not subject to change.

9 primary schools and two secondary schools would be affected by the ending of free travel on faith grounds.

The current estimated full year cost of travel provided on faith grounds for the 2009 -2010 financial year, the projected income from non entitled travellers and the estimated overall unit cost per traveller are shown below:

- a. £681,880 for contracted coach/bus/taxi routes
- b. £19,710 for mileage claims
- c. £17,499 season tickets on public service transport
- d. An income of £80,175
- e. A unit cost of £1,116.98 per traveller

The County Council would work with the schools to facilitate more locally organised transport during the phasing in of the new arrangements.

If agreed, this arrangement would be implemented from September 2011. Proposal 2 sets out the arrangements that would replace the current free and subsidised arrangements for faith travel.

Proposal 2

To consider written representations from any parents who have religious or philosophical convictions for their children's attendance at a school when determining whether free or subsidised transport can be provided to a particular school.

Oxfordshire County Council will respect parents' religious and philosophical convictions as to the education to be provided for their children in so far as this is compatible with the provision of efficient instruction and training and the avoidance of unreasonable public expenditure' (as per para.134 of the Home to School Travel and Transport issued by the then DfES in 2007). It would be necessary for a parent to satisfy the decision maker of the genuine nature of the religious and/or philosophical belief and that the application is made in good faith. The burden of proof would lie with the parent/parents and would need to be greater than the simple provision of a baptismal certificate, or statement of atheism, or statement of adherence to a particular faith, or letter of support from a priest or rabbi stating that they belong to a particular congregation although these may form part of the evidence provided.

It would also be insufficient simply to prefer a particular school on academic grounds.

Only small numbers of children are likely to receive assistance.

Decisions will be taken by a panel of three. The chairman will normally be the Service Manager for Admissions.

Proposal 3

A phased ending of free transport to Chiltern Edge School for those children who are not resident in Oxfordshire

There are three Oxfordshire secondary schools with designated (catchment) areas that extend beyond the county boundary. Currently Oxfordshire does not provide any transport assistance to non-residents attending two of these schools. However, it does provide free transport to 259 children from the Caversham area of Reading to Chiltern Edge School. This arrangement was agreed between the then Berkshire County Council and Oxfordshire County Council in 1992 and in 1995, after a phased transfer of responsibility, Oxfordshire assumed full responsibility for the cost of transport. This raises the issue of equity over the approach to all non-Oxfordshire residents attending an Oxfordshire school. Oxfordshire's statutory duties in relation to school travel relate only to those eligible children who live in Oxfordshire.

The ending of free transport for Reading children attending Chiltern Edge School may affect recruitment to the school but it would not alter the availability of places for Reading children (approximately 75% of the pupils at the school are non-

Oxfordshire residents although only some of these receive free transport). This would not affect those already in receipt of free transport and would apply to those due to start at the school from September 2011.

The current estimated full year cost of travel providing free transport to children from Caversham, Reading, to Chiltern Edge School for the 2009/10 financial year, the number benefiting from this provision and the estimated overall unit cost per traveller are shown below:

- a. The cost of the provision in 2009-10 is expected to be £57,784
- b. There are currently 104 pupils resident in Caversham, Reading, who receive free transport from Oxfordshire
- c. The unit cost is £555.62
- d. With a phased introduction it is estimated that at 2009/10 prices there would be a saving of £57,784 after 5 years

The County Council currently purchases seats on transport arranged by Chiltern Edge School rather than using contracted transport. This means that there is no loss of income by ending this provision.

The phased ending of the current provision of free transport to Chiltern Edge School would make the transport policy more equitable but the savings would not be fully realised until 2016. No other non Oxfordshire residents receive free travel to an Oxfordshire school from Oxfordshire County Council and no neighbouring local authority provides Oxfordshire residents with free transport to any school inside or outside Oxfordshire.

If this proposal is adopted the County Council would work with the school and parents to facilitate extending the locally organised travel arrangements that the school currently has for those who are not entitled to free travel.

Proposal 4

The use of free school meals and maximum working tax credit as the only criteria for waiving the concessionary charge

Exempting those in receipt of free school meals, or whose parent is in receipt of maximum working tax credit, from the concessionary charge for transport would be consistent with the approach adopted by the Department for Children Schools and Families for assessment of low income households. The relevant parent in receipt of WTC is the one with whom the child is ordinarily resident.

This change would simplify the policy and reduce time spent on administration. There would be little detrimental impact on families and no significant cost implications.

Proposal 5

To set the charges for concessionary and post 16 travel at the average commercial fare available at the 3 and 5 mile points.

Under this proposal concessionary places would continue to be made available on home to school transport routes. The cost of the travel would still be relatively low for most families, those on low incomes would continue to benefit from free travel, those not entitled to free travel would continue to have access to subsidised travel but there would be a small reduction in the financial pressure on the Local Authority's transport budget.

The relevant charge would be determined by the distance from the home to the school concerned, as measured by the Local Authority's Geographic information System using the shortest designated public route. As now the Local Authority would not determine charges by a measurement from the pick up point the child would use.

The comparative average costs of the current concessionary fare and those of a season ticket covering a comparable distance are set out in Table 4.

Table 4. Comparative Costs

Type of Charge	Current Concessionary Charges	Current Average Season Fare	Potential Additional Income
Lower	£ 240 per annum (£80 per 2 terms)per two terms	£270 per annum (£90 per two terms)	£30 per annum
Upper	£447per annum (£149 per two terms)	£516 (£172 per two terms)	£69 per annum

Proposal 6

Restrictions on the mileage allowance

Under this proposal parents will only be offered the option of transporting their children to school in their own car if it is the cheapest alternative for the Local Authority. If through a change in circumstance² the payment of the mileage allowance proves no longer to be the cheapest way of transporting the child to school the alternative means of travel will be offered and the parent will be given up to 6 weeks to consider the new arrangement. At the end of that period or when the alternative means of transport is taken up, whichever is the sooner, the mileage allowance will be withdrawn.

The mileage allowance will be provided for the child's journey to school and the return to the child's home. Parents will not be provided with a mileage allowance for their own return to home in the morning or their journey to the school in the afternoon, i.e. the LA will pay a mileage allowance for two journeys per day rather than four. The mileage allowance is the Revenue and Customs All Car Rate (currently 40p). Where free or concessionary travel has been agreed it is provided for attendance at the beginning and end of the school day and not for extracurricular activities.

The relevant charge will be determined by the distance from the home to the school concerned, as measured by the Local Authority's Geographic information System using the shortest designated public route. The Local Authority will not determine charges by measurement from the pick up point the child would use.

Proposal 7

Collaborative Learning Transport

It is proposed to meet the cost of Collaborative Learning Transport from the budgets of 14-19 Partnerships rather than the Home to School Transport Budget and decisions on provision will be made by those Partnerships.

The proposed arrangement is that transport assistance to access collaborative learning opportunities will be determined by distance as set out overleaf:

- a. Any arrangement applies to the nearest provider of that course.
- b. If a single journey from the home school to the nearest course provider is over 3 miles then transport will be provided.

² For example if a taxi contract is awarded to transport another nearby child to the same school and there is a spare seat in the vehicle.

- c. If journey from home to home school is less than 3 miles but the distance from the home school to the nearest provider is over 1.5 miles then transport will be provided from home school to the provider only.
- d. If the journey from home to school is less than 3 miles but the distance from the home /school to the nearest provider is over 1.5 miles then transport will be provided from home/school to the provider only.
- e. If the distance from the student's home to school is over 3 miles but the distance from the home/school to the nearest provider is less than 1.5 miles (safe/reasonable walking distance) then transport will not be provided to continue on to the provider.
- f. If a pre-existing route from the child's home to their nearest provider is available then a place may be offered on that transport if the distance is over 3 miles (with the consortium paying for concessionary places). If the distance is less than 3 miles and a concessionary seat is available the student's parent must apply and pay as set out in the Home to School Transport Policy.
- g. If a course runs over 2 hours of the normal school day then transport will be provided to the child's home but only if that child is living over 3 miles from their home school.

Section 3

Proposed Home to School Travel Policy for 2011/12

Introduction

2. The County Council is keen to encourage young people to walk or cycle to school or college or to make use of public transport, but it also provides free transport and some assisted transport as set out in the Home to School Transport Policy set out in this document.
2. The legal basis for the provision of home to school transport is set out in sections 508A, 508B, 508C, 508D and 509AD and Schedule 35B of the Education Act 1996 (as amended by Part 6 of the Education and Inspections Act 2006) and where appropriate the Equality Act and English and European case law. In addition local authorities are under a statutory duty to have regard to the Home to School Transport Guidance issued by the then DfES (now DCSF) in 2007.
3. The Home to School Transport Policy applies to young people who live in the County of Oxfordshire. Those who are not resident in Oxfordshire are advised to contact their own home local authority for details of any policy that their home authority may have regarding home to school/college transport.
4. Parents of those aged from 4 (Rising Five's) to 16 need to complete and submit a Transport Application Form if they wish to apply for free or subsidised home to school transport. If they wish to apply for subsidised travel an 'Application for Concessionary Travel on a School Bus' needs to be completed.
5. When, under the Home to School Transport Policy, children and young people are entitled to free transport it is provided by the most cost effective means. This will usually be by the provision of a free bus pass. However, where numbers are small children sometimes have to be transported by taxi. Where parents wish to take their children to school and it is therefore possible to avoid the provision of a taxi the Local Authority may agree to the payment of a mileage allowance. The mileage allowance is provided for the child's journey to school and the return to the child's home. Parents are not provided with a mileage allowance for their own return to home in the morning or their journey to the school in the afternoon, i.e. the LA pays a mileage allowance for two journeys per day rather than four. The mileage allowance is the Revenue and Customs All Car Rate (currently 40p). If through a change in circumstance³ the payment of the mileage allowance proves no longer to be the cheapest way of transporting the child to school the alternative means of travel will be offered and the parent will be given up to 6 weeks

³ For example if a taxi contract is awarded to transport another nearby child to the same school and there is a spare seat in the vehicle.

to consider the new arrangement. At the end of that period or when the alternative means of transport is taken up, whichever is the sooner, the mileage allowance will be withdrawn.

6. Where free or concessionary travel has been agreed it is provided for attendance at the beginning and end of the school day and not for extracurricular activities.
9. The responsibility for determining entitlement issues rests with the School Admissions Team since transport decisions relate to the school attended. The responsibility for organising transport rests with the Integrated Transport Unit.
10. Any information regarding Oxfordshire's Home to School Transport Policy obtained from any source other than the Admissions Team of Oxfordshire County Council or the Oxfordshire public website should be disregarded.
9. Buses and coaches used for home to school transport are public service vehicles and are subject to specific safety legislation. This is enforced by an initial inspection and certification of the vehicle followed by subsequent annual checks. Vehicles are also subject to random roadside checks undertaken by the 'Vehicle and Operator Service Agency' (VOSA). VOSA are able to prohibit any vehicle that is non-compliant, i.e. is in a dangerous condition, not roadworthy and/or the driver's hours are irregular. Any Service Provider using sub-standard vehicles may lose their operator's licence.

Statutory Walking Distance

10. In understanding home to school transport and what can and cannot be provided free of charge it is important to understand what is referred to as "the statutory walking distance". This is 2 miles for children who are under 8 years of age, and 3 miles for those of statutory school age who are 8 and over. It is measured along the shortest route along which a child, accompanied by a responsible adult, may walk with reasonable safety. The route may include footpaths, bridleways, and other pathways, as well as recognised roads. All such routes need to be open to the public. When there are issues raised over the possible safety of a walking route the Admissions Team will arrange for an initial assessment by the Integrated Transport Unit and if necessary a full risk assessment by Road Safety.

Distance Measuring for Free Transport for Children of Low Income Families

11. The 2 mile limit is measured in the same way as the "statutory walking distance". However, the 6 mile and 15 mile upper limits are not walking routes. They are measured along routes that are passable using a road route suitable for motorised vehicles.

Home

12. A child's home is considered to be the child's main place of residence during the normal school week. Free transport can only be provided from that one address.

Travel to a Friends Home

13. No seat can be provided on an ad hoc basis to children wishing to travel to the homes of children who are entitled to free transport.

Escorts

14. Escorts are normally only provided when it has been established through the assessment or review process that a child with a Statement of Special Educational Needs has a specific need to be accompanied.
15. Escorts will not normally be provided in any other circumstances.

Parents accompanying children in OCC transport

16. Parents will not normally be able to travel in OCC provided transport.

Assessment of Eligibility for Free Transport on Admission to Primary or Secondary School

17. An assessment of eligibility for free transport is made as part of the normal admissions process for entry to school. Parents are normally notified of the decision in the letter offering a school place.
18. If a child ceases to be eligible during the course of the school term, for example due to moving address, the provision should cease at the end of that term.

Free transport for those of school age (F1 to Year 11)

19. Children within the following categories are eligible for free transport:
 - a. Children attending the designated (catchment) school for their address if the distance from home to school is over the "statutory walking distance" of 3 miles if 8 or over or 2 miles if less than 8 and of statutory school age. This applies whether or not the school was listed on the Common Admissions Preference Form (admissions application form).
 - b. Children attending the nearest available school or educational placement to their address, if the distance from home to school is over the "statutory walking distance" of 3 miles if aged 8 or over or 2 miles if less than aged 8 and of statutory school age. This applies whether or not the school was listed on the Common Admissions Preference Form (CAPF).

- c. Children who are aged 8 or over and are under 11 years old who are eligible for Free School Meals or whose parents are in receipt of the maximum level of Working Tax Credit and attend the nearest school if it is over 2 miles from their home.
- d. Children aged 11 to 16 who are eligible for Free School Meals or whose parents are in receipt of the maximum level of Working Tax Credit and who attend one of their three nearest suitable schools (or places other than school at which they might receive education under section 19(1) of the Education Act 1996), where they live more than two but not more than 6 miles from that school. The 2 mile distance is measured by “walking route” and the 6 mile distance is measured by road route.
- e. Children attending the nearest available school to their address even if it is less than the statutory walking distance, if it would not be safe for a child accompanied by an adult to walk from the home to the school. This applies whether or not the school was listed on the CAPF. If the route is subsequently determined to be safe the free transport will be withdrawn after the parent will be given up to 6 weeks to consider the new arrangement. At the end of that period or when the alternative means of transport is taken up, whichever is the sooner, the mileage allowance will be withdrawn.
- f. Children aged 11 to 16 who are eligible for Free School Meals or whose parents are in receipt of the maximum level of Working Tax Credit and want their child to be educated in accordance with their religion or belief and they attend the nearest suitable school preferred on grounds of religion or belief that is over 2 miles but no more than 15 miles from their home. The 2-mile distance is measured by “walking route” and the 15-mile distance is measured by road route.
- g. Children entitled to free transport who then move house during Year 11 and continue to attend their original school subject to the following limits:
 - i. Transport can be provided other than by taxi
 - ii. The distance travelled is no more than 15 milesTaxis will only be used in exceptional circumstances.
- h. Children with a disability who do not have a Statement of Special Educational Need who by reason of their disability are unable to walk even relatively short distances to school and children with a mobility problem caused by a temporary medical condition, for example a broken leg. This assistance is subject to confirmation of the medical reasons for the provision by a GP or consultant.

- i. Children with a Statement of Special Educational Needs where one of the following applies:
 - (i) The school attended is the nearest suitable school or educational placement to their address that has an available place, if the distance from home to school is over the “statutory walking distance” of 3 miles if aged 8 or over or 2 miles if less than aged 8 and of school age.
 - (ii) The school attended is the nearest suitable school or educational placement to their address that has an available place and the distance from home to school is less than the distances set out in h(i) but it would not be safe for a child accompanied by an adult to walk from the home to the school.
 - (iii) The children concerned are unable to walk to school by reason of their special educational need or, if disabled, their disability or because of a temporary or long term medical condition. Evidence is required from a GP or consultant.

Free Travel to Out County Residential Schools for those with Special Educational Needs

20. Out County Weekly Boarding

The beginning and end of each term of each school week to a total of 76 single journeys per year.

21. Out County Termly Boarding

Children of 11 or over are entitled to free travel at the beginning and end of each term and half term up to a maximum of 16 single journeys per year.

Children of 11 or over are entitled to free travel at the beginning and end of each term and half term, plus 4 discretionary journeys home per year, up to a maximum of 24 single journeys per year.

22. Out County 52 Week Boarding (joint placement with other agency)

All boarders (or parents) are entitled to 12 single trips home per year (broadly relating to term times). Any additional trips will be the responsibility of the other agency.

23. Payment of parental journeys for those with children at out county residential special schools.

Payment will be made if one of the following applies:

- a. Attendance at their child's annual review
- b. Attendance at any meeting called by the LA at the pupils school
- c. Journeys necessitated by a child's sickness or emergency medical appointments
- d. An agreed journey to visit a new school placement
- e. To attend up to three additional meetings per year at the school (called by the school or requested by the parents) if sanctioned by the LA in advance.

24. Overnight Accommodation

The LA will not normally reimburse the cost of overnight accommodation for parents/carers.

16-19 Home to School/College Transport

Annual 16 to 19 Transport Policy Statement

25. Details of travel provision for the 16 to 19 age group will be published by 31 May of each year in the 16-19 Transport Policy Statement. This is intended to ensure that young people can make informed choices regarding post16 education. The Policy Statement can be amended in year in response to complaints or a direction from the Secretary of State. Complaints can be heard by the Appeals Sub-Committee of the Democratic and Organisation Committee (DOC).

Free Travel

26. Students with learning difficulties and/or disabilities who are beyond statutory school age and who are aged 16 to 19, will receive free travel to that placement when they attends the nearest suitable school or educational placement to their home address that has an available place and one of the following applies:
- a. It is over 3 miles from their home to the educational placement.
 - b. It is less than 3 miles from their home to the educational placement but it would not be safe for the young person, even if accompanied by an adult, to walk from home to that placement.
 - c. The young person is unable to walk to the school or education placement due to their learning difficulty and/or disability, or because of a temporary or long term medical condition. Evidence is required from a GP or consultant.

Subsidised Travel (16-19 age group)

27. Students who do not have learning difficulties and/or disabilities who are beyond statutory school age, are aged 16 to 19, and who attend either a college or a school may use the concessionary travel scheme where it is necessary to enable them to access the designated school or college for their area (lower concessionary charge payable) or to access a non designated area school or college (higher concessionary charge payable). The concessionary travel scheme makes places available on transport provided for those who are eligible for free home to school transport.
27. Oxfordshire residents aged 16-19 living within the catchment area of Henley College will continue to be eligible for subsidised travel to that college if the college is over 3 miles or if there is no safe walking route (lower concessionary charge payable). The latter charge will be reviewed on an annual basis.
28. In exceptional circumstances, and only where places on relevant home to school transport routes are unavailable, season tickets on public transport may be provided for travel to the designated college or school from the student's home address at the relevant concessionary charge rate. This is meant to apply where a home to school transport route is full and it would be possible to use public transport and so avoid the unnecessary additional public expense of contracting for additional capacity on that route.

Travel Arrangements for Learners with Learning Difficulties Assessments (aged 19-24)

29. An annual Learning Difficulties and Disabilities Transport Policy Statement will be issued by the LA either with the 16-19 Transport Policy Statement or separately. This document will specify any transport or other arrangements, any payment of travel expenses and concessionary schemes which the LA plans to make available to this group of learners in the following academic year to publication. The Policy Statement will also set out the arrangements for facilitating boarding provision outside both the further education and higher education sectors. Complaints can be heard by the Appeals Sub-Committee of the Democratic and Organisation Committee (DOC).

The Concessionary Travel Scheme

30. Concessionary seats are spare seats on home to school transport routes. These are routes that are operated for the benefit of those who are entitled to free transport to and from school. The key points regarding this scheme are set out below:

- a. The Council cannot guarantee that a young person will keep the seat for longer than two terms
- b. Fare prices are reviewed annually
- c. The parent, or in the case of Years 12 and 13 must complete an application form for concessionary travel
- d. Parents are required to pay for two terms travel in advance
- e. The price charged covers a return journey for every school day of the relevant period
- f. There will be no rebates for those deciding to travel for less than the maximum number of possible journeys per term, for example there is no rebate if a young people decides to use his/her bus pass for morning travel and returns by some other private means in the afternoon
- g. If a seat is available a bus pass will only be issued on receipt of a completed application form, and correct payment
- h. No guarantee can be given that the bus will continue to run throughout a young person's time at a school, or that the place on the bus will not be withdrawn at some future date if the place is required for a young person who is entitled to free travel
- i. The concessionary charge will be waived for those eligible for Free School Meals or for those whose parents are in receipt of the maximum level of Working Tax Credit
- j. When there are more requests to pay for seats on a particular route than there are seats available they will be allocated in the descending order of priority shown in Table 5.

Table 5. Priority for Concessionary Places

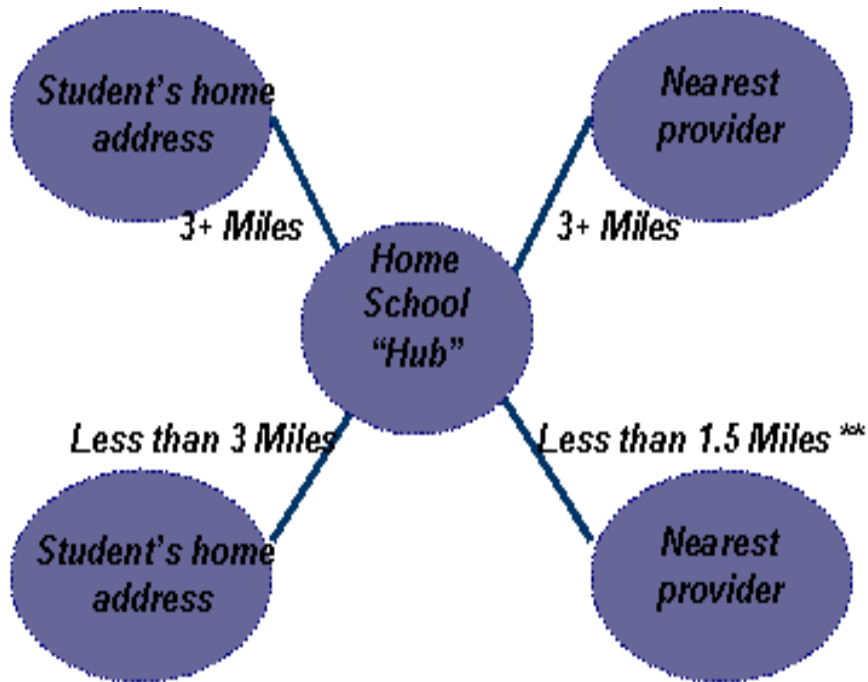
Priority	Category
1.	Those with a Statement of Special Educational Needs naming the school
2.	Looked After Children
3.	Years 12 and 13
4.	Children in receipt of Free School Meals or whose parent/parents are in receipt of the maximum of Working Tax Credit
6.	Those who travelled on the route the previous term

7.	By year group, in ascending order of priority from F1 to Year 11
8.	Those living closest using the shortest designated public route on the County Council's Geographic Information System

Collaborative Learning Transport

31. The cost of collaborative learning transport is met from the budgets of 14-18 Partnerships, not the Home to School Transport Budget and decisions on provision will be made by those Partnerships.
32. Transport assistance to access collaborative learning opportunities is determined by distance as set out below:
 - a. Any arrangement applies to the nearest provider of that course
 - b. If a single journey from the home school to the nearest course provider is over 3 miles then transport will be provided
 - c. If journey from home to home school is less than 3 miles but the distance from the home school to the nearest provider is over 1.5 miles then transport will be provided from home school to the provider only
 - d. If the distance from the student's home to school is over 3 miles but the distance from the home/school to the nearest provider is less than 1.5 miles (safe/reasonable walking distance) then transport will not be provided to continue on to the provider
 - e. If a pre-existing route from the child's home to their nearest provider is available then a place may be offered on that transport if the distance is over 3 miles (with the consortium paying for concessionary places). If the distance is less than 3 miles and a concessionary place is available the student must apply and pay as set out in the Home to School Transport Policy
 - f. If a course runs over 2 hours of the normal school day then transport will be provided to the child's home but only if that child is living over 3 miles from their home school.
33. Diagram 1 illustrates how the Home to School and Collaborative Learning Transport Policy would affect the normal journey for a student to their nearest provider.

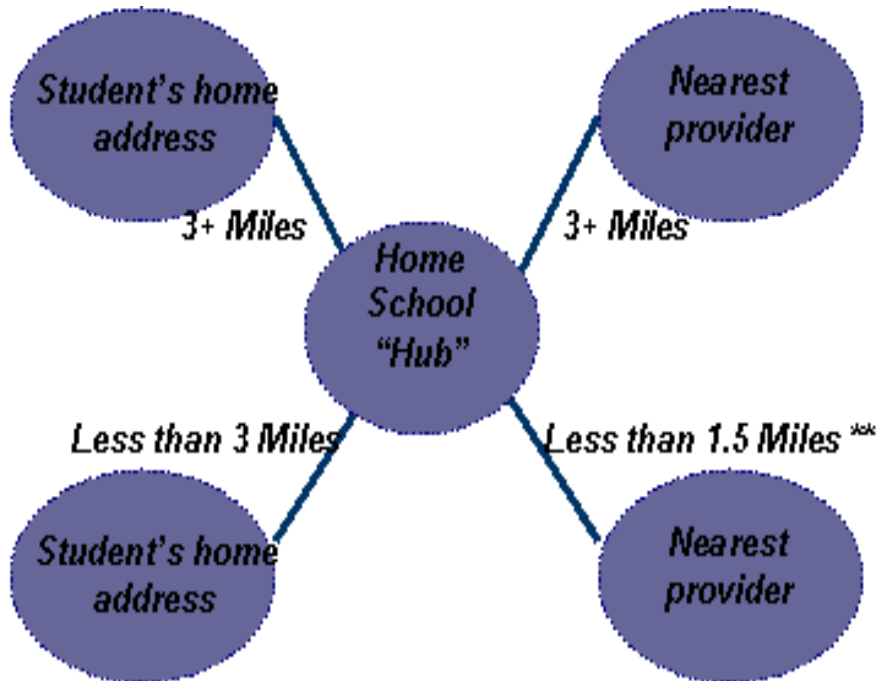
**Diagram 1
"Hub & Spoke"
Journey Criteria Model A**



*** If this journey is greater than 1.5 miles then transport would be provided on the grounds that it is not a reasonable journey time.*

34. Diagram 2 illustrates when a student would not normally be eligible for transport but a seat on a concessionary bus route is available from close to their home address to the nearest provider. If the journey is over 3 miles the relevant consortium may apply for and pay for the seat. If the journey is less than three miles then it would be the responsibility of the parent to apply and pay for the seat.

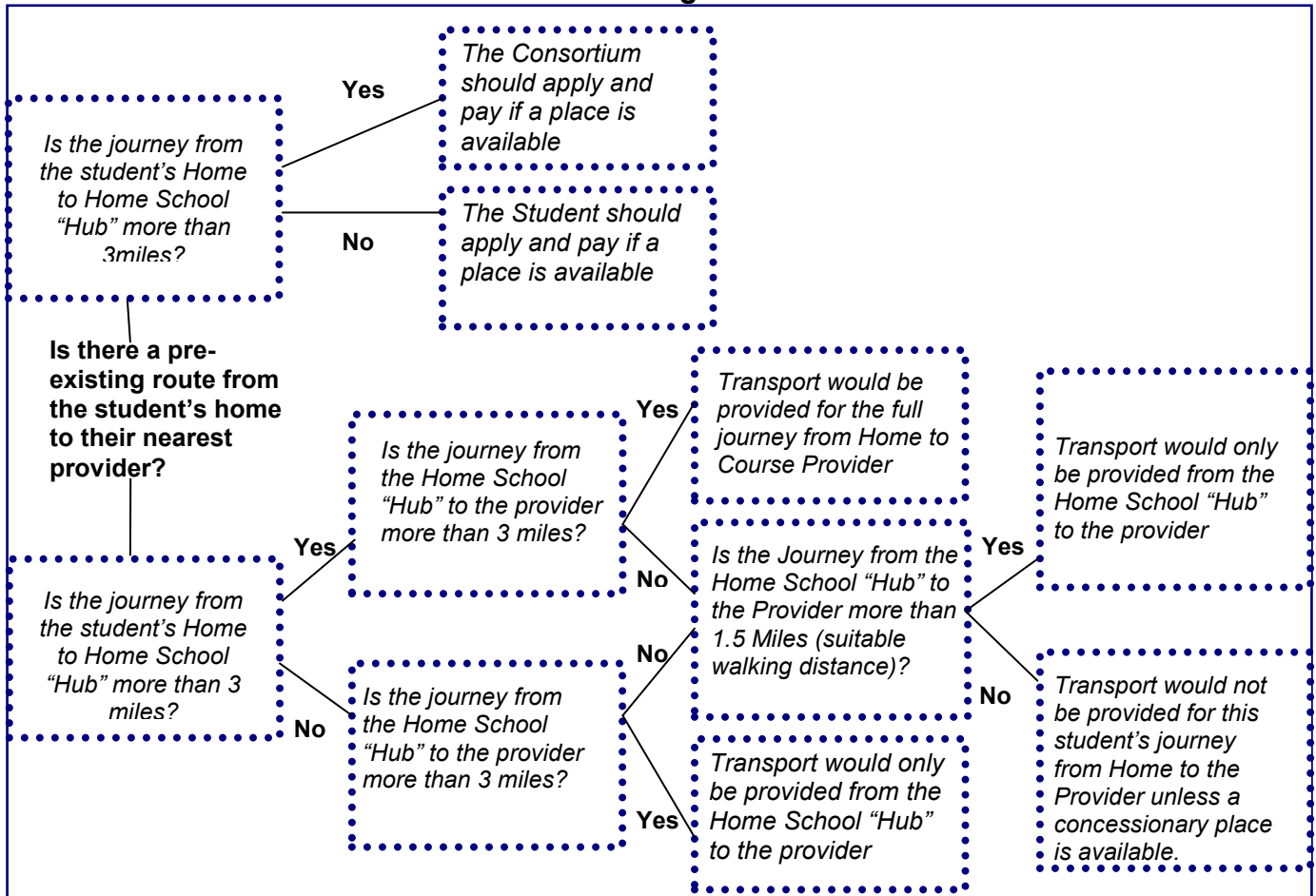
Figure 2
Concessionary Travel
Journey Criteria Model B



*** If this journey is greater than 1.5 miles then transport would be provided on the grounds that it is not a reasonable journey time.*

35. Diagram 3 expresses the criteria in a flow diagram.

**Diagram 3
Flow Diagram**



Transport Appeals

36. Parents can request an appeal to the Appeals Sub-Committee of the Democratic and Organisation Committee (DOC) regarding decisions taken by officers within the Admissions Team or the Integrated Transport Unit should they have cause for complaint or disagreement concerning the eligibility of their child for travel support.
37. The Clerk to the Appeals Sub-Committee will not be a member of the Admissions Team or the Integrated Transport Team.
38. The Appeals Sub-Committee hearings will be organised as soon as possible following the request from parents to lodge an appeal. The timing of the appeal will depend upon the availability of councillors.
39. A representative of the Admissions Team will present the LA's reasons for not providing transport and appellants can present a case in writing and /or in person (if the parent wishes, accompanied by a friend). The format of the appeal is set out below:
 - a. Presentation of the LA's case by the LA representative

- b. Committee members and the parent are able to ask questions of the LA representative
 - c. Presentation of the parent's case
 - d. Summing up by the LA representative
 - e. Summing up of the parents case
 - f. Both the LA representative and the parent/parents friend leave the hearing together.
 - g. Consideration of the case by the Appeals Sub-Committee
 - h. The Appeals Sub-Committee makes a decision as to whether to uphold or refuse the appeal
40. The decision of the Appeals Sub-Committee will be considered binding by the LA and there is no further right of appeal.
41. The LA will not consider requests for a further transport appeal within the school year unless there has been a significant change of circumstance.

Comments Sheet

Consultation on Home to School Transport Policy

Please use this form to make any comments you may have regarding the proposed policy changes and then return it by email to admissions.schools@oxfordshire.gov.uk or by hard copy to The Admissions Team, County Hall, New Road, Oxford OX1 1ND.

It would be particularly helpful if comments could be sent as an e-mail attachment.

Contact name	
Type of organisation (if a school please state type e.g. voluntary aided), if applicable	
Parent (please delete as appropriate)	Yes/No
Contact address	
Contact telephone number	
Date	

Proposal 1

The phased ending of free travel to faith schools

Agree Disagree Neither agree nor disagree

Comments

Proposal 2

To consider written representations from any parents who have religious or philosophical convictions for their children's attendance at a school when determining whether free or subsidised transport can be provided to a particular school.

Agree Disagree Neither agree nor disagree

Comments

Proposal 3

The phased ending of free transport to Chiltern Edge School for those not resident in Oxfordshire

Agree Disagree Neither agree nor disagree

Comments

Proposal 4

The use of free school meals and maximum working tax credit as reasons for waiving the concessionary charge

Agree Disagree Neither agree nor disagree

Comments

Proposal 5

To set the charges for concessionary and post 16 travel at the average commercial fare available at the 3 and 5 mile points.

Agree Disagree Neither agree nor disagree

Comments

Proposal 6

Restrictions on the mileage allowance

Agree Disagree Neither agree nor disagree

Comments

Proposal 7

Collaborative Learning Transport

Agree Disagree Neither agree nor disagree

Comments

Reasons cited for opposition to the changes to faith based transport

Reasons offered	Parents 20 people responded	Schools 4 responses	Total	Remarks
Environmental impact	14		6	Over time, if the proposed policy is adopted, there may be a potential increase in car use
Impact on the character and sustainability of BGN	5	1		Over time, if the proposed policy is adopted, fewer children from the Bicester area may attend The Blessed George Napier School
Difficulty of proving religious conviction	18	2		Most parents are expected to be able to give sufficient proof of their faith The avoidance of unreasonable public expense is the key to understanding this part of the proposed new policy.
Contrary to the Human Rights Act	8	1		The proposed policy was checked by the County legal services before publication and meets legal requirements.
Contrary to the Equalities Act	4			The proposed policy was checked by the County legal services before publication and meets legal requirements.
Financial hardship	14			Those on low incomes will not be affected.
Lack of capacity in Bicester secondary schools	6			There is significant unused capacity in the two Bicester secondary schools. This amounts to approximately 500 places.
Commitment made at the opening of BGN	4	1		No legally binding commitment was made at the opening of BGN
Commitment made at the opening of St Joseph's	1			No legally binding commitment was made at the opening of St Joseph's
Reduces parental choice of school	3	2		Home to school transport is not normally provided on grounds of parental choice for

				any other type of school
Discrimination against Catholics	1			This is untrue. Catholic families have received more favourable treatment than those attending non faith schools. Those Catholic families in the Bicester area have received more favourable treatment than Catholic families living in the area served by St Gregory the Great.
Result of poor investments	2			These comments may refer to the problems encountered with Icelandic banks. There is no direct correlation between home to school transport policy and investments.

Statement from the Blessed George Napier School

History of Catholic Education in North Oxfordshire

- Blessed George Napier School was opened in 1961 and has, for the last 40 years, served the local Catholic population including Bicester and surrounding rural areas. The closure of the flourishing St Mary's All-Age Catholic School in Bicester (established 1883) at the time that we opened created a situation in which pupils had to be bussed to Banbury to continue their Catholic education and a moral and tacit commitment to providing Catholic families with a school of a religious character was thus established.
- Although there have been challenges to the funding of the subsidised funding over the last 40 years, this commitment has been honoured by the local authority.
- BGN has served North Oxfordshire in providing a secondary education in the context of a strong religious faith for not only Catholic children but also those of other denominations and other faiths who recognise the ethos, moral and community values which we hold dear.
- Catholic parents actually pay twice to exercise their right to choose a school of a religious character as they pay through taxes and again through their contributions to the Diocese and the Catholic Education Service.
- We reject the suggestion that we won't see an immediate change to our intake as this proposal will affect the confidence and well-being of families in St Mary's RCP School who feel that they cannot commit themselves to the expense in future years and for future children and so will not choose BGN School for the older children.

Principle of parental Choice

- There are only 2 VA secondary schools of a religious character in the whole of Oxfordshire and so parental choice is already limited. We believe that the proposal to cut funding for buses drastically limits this choice, not for the affluent parents who could afford to continue to send their children to BGN, but directly discriminates against the lower and middle income families who do not qualify for Free School Meals or Working Tax Credits but for whom the transport costs would be prohibitive.

Cost Implications

- We challenge the assertion that £600,000 will be saved to the LA through this proposal. This is not a true saving as:
 1. There will still be transport required by a significant number of pupils from the outlying areas accessing education in Bicester or Banbury;
 2. For some pupils BGN School will still be their nearest school but as they are living at a distance greater than 3 miles from the school will still qualify for funding;

3. Even though it is stated that there are 500 school places in Bicester these do not exist at the present time and although there may be capacity to expand, this will involve the LA in considerable expense requiring huge additional staffing and new buildings or refurbishment.

Environmental Concerns

- This proposal runs contrary to local, national and European government policy in terms of environmental issues as a very significant number of parents will continue to exercise their right to choose a school of religious character and will, in the absence of the provision of public transport, drive their children to school.

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Division(s): All

CABINET – 22 JUNE 2010

HOMES & COMMUNITIES AGENCY SINGLE CONVERSATION: LOCAL INVESTMENT AGREEMENT

Report by Head of Sustainable Development

Introduction

1. On 16 March 2010 Cabinet considered a report on the work with the Homes and Communities Agency to develop a Local Investment Plan (LIP) and Local Investment Agreement (LIA) for Oxfordshire. The LIP was signed off by the Oxfordshire local authorities at the end of March and submitted to the Homes & Communities Agency. The LIA has been prepared to commit the parties (the HCA and local authorities) to implementing the LIP. The aim is for the LIA to be signed off by the Spatial Planning and Infrastructure Partnership (SPIP) at the end of June following consideration by the meetings of the Cabinet/Executive of the six Oxfordshire local authorities.
2. This report recommends that the County Council enters into the proposed Oxfordshire Local Investment Agreement (LIA) and that finalisation of the wording of the LIA is delegated to the Head of Sustainable Development in consultation with the Cabinet Member for Growth and Infrastructure.

The Single Conversation Local Investment Agreement

3. The Single Conversation is a process of dialogue between the HCA, Oxfordshire local authorities and partners to set out investment priorities. The LIP identifies priority investments linked to place making for the short, medium and longer term. The LIA (see draft at Annex 1) has been prepared to commit the parties (the HCA and local authorities) to implementing the LIP (attached at Annex 2). The LIA is in the form of a memorandum of understanding and protocol for joint working; it is not a legally binding document except for a limited number of general provisions relating to issues such as confidentiality, freedom of information and dispute resolution.
4. The LIA refers in general terms to development which has HCA financial or other assistance being delivered in accordance with HCA procurement policies. Current HCA funding commitments are to be appended to the LIA and updated regularly through SPIP. For the local authorities and other partners, the LIA points in general terms to resources such as funding, land, employees, possible use of compulsory purchase powers and leverage of third party resources, which HCA and SPIP will work towards procuring for individual schemes, but these are not detailed. The document lists the 12 broad localities or “interventions” which cover the priority housing schemes identified in the LIP together with the lead district responsible for overall management and monitoring of the LIP.

Comments of Head of Sustainable Development

5. The single conversation is seen as an ongoing, iterative process, for delivering priorities for housing and related infrastructure, which includes building relationships with other delivery agencies including government departments.
6. A key issue for the County Council is to ensure that appropriate priority is given to strategic infrastructure which is necessary to deliver the priority housing schemes. I have concerns that the LIA is focussed around the relationship between districts and HCA for the delivery of housing and less on the role of the County Council in delivering the strategic infrastructure identified in the LIP as essential to deliver the priority housing schemes. However, the LIP and LIA will provide a framework for taking work forward and the context for the regular review and update of the LIP; and against which any issues that arise can be addressed through the SPIP in managing decisions on funding priorities if the LIP is to be implemented effectively.
7. I reported in March that there was a lack of clarity about the amount of funding available to the HCA over the next five years. With the continuing uncertainty around public sector funding the deliverability of infrastructure projects necessary to support delivery of the top priority growth schemes is a major concern. The need for any additional prioritisation beyond that identified already in the LIP is likely to be a major challenge for the partners working through the SPIP in the coming year.

Financial and Staff Implications

8. The LIP and LIA could provide an important element in the allocation of public funding for infrastructure. Work on the single conversation has been met out of existing resources and has had a major impact on staff resources and input to other work areas. We are learning from the single conversation process and will take work forward on infrastructure planning in the next year but it is not anticipated that this will have any additional staffing implications

RECOMMENDATION

9. **The Cabinet is RECOMMENDED to:**
 - (a) **agree that the County Council enters into the proposed Oxfordshire Local Investment Agreement (LIA); and**
 - (b) **delegate authority to finalise the wording of the LIA to the Head of Sustainable Development, to be exercised after consultation with the Cabinet Member for Growth and Infrastructure.**

CHRIS COUSINS
Head of Sustainable Development

Background papers: Nil

Contact Officer: Ian Walker Tel: 01865 815588

June 2010
CAJUN2210R022.doc

ANNEX 1**Draft Local Investment Agreement****1. PARTIES**

- 1.1 HOMES AND COMMUNITIES AGENCY having its principal place of business at 110 Buckingham Palace Road, London SW1W 9SA (the “Agency”).
- 1.2 [OXFORDSHIRE SPATIAL PLANNING AND INFRASTRUCTURE PARTNERSHIP _ -SPIP - AND ITS CONSTITUENT COUNCILS]¹ representing Cherwell District Council, Oxford City Council, South Oxfordshire District Council, Vale of White Horse District Council, West Oxfordshire District Council and Oxfordshire County Council and their partners (the “SPIP”).

OBJECTS

- 2.1 The parties² have identified that the Area is in need of investment to support growth and regeneration objectives^{3,4}:
- 2.2 The parties have previously agreed a Local Investment Plan (LIP) for the Area. This Agreement should be read in conjunction with the LIP. A copy of the LIP is attached. The Agreement sets out the respective contributions of the parties and how they will work together to achieve the vision below and objectives set out in para 2.3 for the benefit of⁵ the Area.
- 2.2.1 Create a World Class economy for Oxfordshire building particularly on the high tech sector;
- 2.2.2 Have healthy and thriving communities to sustain what is good about the City, Towns and Villages while also responding to the needs of the 21st Century including the impact of demographic and lifestyle changes;
- 2.2.3 Look after the environment and respond to the threat of climate change and the potential for more extreme weather conditions, particularly the threat of flooding;
- 2.2.4 Break the cycle of deprivation by addressing the regeneration needs of disadvantaged communities; reducing the gap between the best and worst off, and helping people maximise their talents and raise their aspirations;

Ref : Page of the LIP

¹ Insert full name of (each of) the relevant local authority/ies.

² Refer to the relevant strategy or policy document(s). If none, put “parties”.

³ State what the problems are, the principles of intervention and what type of support is required.

⁴ Set out the vision for the Area.

⁵ Include whichever is more appropriate, or delete both and replace with more relevant wording.

2.3 The Agency and the SPIP will work towards achieving the following objectives:

- 2.3.1 Deliver new housing, including affordable homes
- 2.3.2 Support economic growth
- 2.3.4 Achieve regeneration and tackle deprivation
- 2.3.5 Contribute to meeting strategic infrastructure needs⁶

Ref ; Page of the LIP

AREA

3.1 This Agreement relates to Oxfordshire (the “**Area**”). The Area is shown more particularly [edged red] on the plan attached to this Agreement⁷.

STATUS

- 4.1 This Agreement is treated as a “Memorandum of Understanding and a protocol for joint working”. It is not legally binding upon the parties except for the provisions of paragraph 12⁸.
- 4.2 Nothing contained in or carried out pursuant to this Agreement and no consents given by the Agency or the SPIP will prejudice the Agency's or the SPIP and its constituent local authorities (as appropriate) rights, powers or duties and/or obligations in the exercise of its functions or under any statutes, byelaws, instruments, orders or regulations.⁹
- 4.3 This Agreement is without prejudice to the SPIP and its constituent local authorities and/or the Agency’s functions as a local planning authority, and both parties may continue to exercise such functions as if they were not a party to this Agreement.¹⁰
- 4.4 This Agreement is subject to the constitutional right of any future Parliament and/or the Agency’s sponsor department to determine the amount of money to be made available to the Agency in any year and the purpose for which such money can be used.¹¹
- 4.5 This Agreement is also subject to the terms of the Framework Document between the Agency and its sponsor department, as the same may be amended or replaced from time to time.¹²

⁶ Insert details of all the objectives that the parties wish to achieve.

⁷ It is useful to attach a plan showing the Area so that all parties are clear about the extent of the land covered by the LIA. If further land may be subject to the LIA in future, this could be shown differently on the plan, and the intention to add in such land recorded as a new point 3.2.

⁸ If there are any other contractually binding commitments, they need to be cross-referred to here. Please involve the HCA’s legal team or external lawyers if it is intended to do this.

⁹ Do not amend this paragraph.

¹⁰ Do not amend this paragraph.

¹¹ Do not amend this paragraph.

¹² Do not amend this paragraph.

GOVERNANCE AND RISK

- 5.1 The parties agree that the SPIP will act as the appropriate governance body and mechanism for the purposes of this agreement and implementation of the LIP. The Agency and the constituent councils will each appoint senior representatives to the SPIP Board. The Board will meet quarterly and will undertake regular review and update of the LIP and this agreement. The Board will be supported by a SPIP Executive Group which will meet monthly¹³. This will be made up of officers from the 6 member authorities and the HCA and other partners. This group will be responsible for all the operational management and monitoring arrangements for the LIP and LIA. Any party may change its representative(s) following (where possible) consultation with the other party. The SPIP governance arrangements will allow for membership by GOSE, SEEDA, Environment Agency, Highways Agency, Natural England, Oxfordshire Economic Partnership, Oxfordshire Environment & Waste Partnership, Oxfordshire PCT, SEEPB, Thames Valley Police. Additional representation can be agreed by the principal parties as appropriate¹⁴.
- 5.2 The items to be discussed regularly by the SPIP Executive Group are:
- 5.2.1 Progress in achieving the agreed outputs and delivering the LIP (including addressing risks in respect of infrastructure constraints)
 - 5.2.2 Priorities for delivery
 - 5.2.3 Allocation of resources
 - 5.2.4 **Input from other public agencies on their role in assisting with implementation of the LIP...**¹⁵
- 5.3 Decisions of the SPIP and its Executive Group will be made by consensus.¹⁶ The local authority members of the SPIP will each nominate one of their representatives to be Chairperson on a rolling annual basis, (alphabetical order with agreed handover date). The Chair of the Executive Group will be held by the same Council as chairs the SPIP Board.
- 5.4 **Legal structure:** nothing in this Agreement creates the need for additional legal structures. The parties intend to use the SPIP for management of the Oxfordshire Single Conversation.¹⁷

¹³ Insert frequency of meetings e.g. once a quarter / once a month.

¹⁴ If other parties are to join the steering group, such as RDA's, district councils, existing delivery vehicles etc, set out how many representatives each organisation (other than HCA and the Council(s) signing this Agreement) will be asked to nominate.

¹⁵ Include items that will be subject to further discussion / agreement. These could include timetable and milestones, progress against any other relevant agreements / frameworks, how sites will be brought forward for development, input from other public agencies etc.

¹⁶ Delete whichever option is not appropriate.

¹⁷ Consider whether any new legal entities will in fact be required - although, where possible, existing entities should be used.

5.5 **Approvals and consents:** individual councils responsible for locality priorities and projects may need to enter into more detailed arrangements and contracts with HCA and other partners. Before entering into any more detailed contractual commitments in relation to the Area and/or matters arising from this Agreement:

- 5.5.1 the Agency will need to obtain Project Executive and (where relevant) Board approval and Secretary of State consent .
- 5.5.2 the individual council and other partners involved will need to obtain committee / cabinet or other appropriate project approvals.

STAKEHOLDERS

6.1 Working jointly the SPIP and the Agency will engage with a wide range of public and private sector partners in order to achieve the Strategic Objectives for Oxfordshire identified within the Local Investment Plan.. This will be achieved through all available consultation mechanisms (including those specific to particular locality or project requirements), but, in particular, the Partnership will hold occasional stakeholder events (known as the SPIP Forum).

INTERVENTIONS

- 7.1 The parties' priorities in terms of interventions are listed below from paragraph 7.11 to paragraph 7.22.
- 7.2 The parties' intend to undertake individual scheme investment appraisals. It is envisaged that legally binding agreements will be entered into in the future by the HCA and SPIP (and any other relevant parties) to regulate the carrying out of these project appraisals.
- 7.3 **Non-Negotiables**
 - 7.3.1 Development achieved as a consequence of:
 - 7.3.1.1 Financial Assistance provided by the HCA pursuant to the Housing and Regeneration Act 2008; and/or
 - 7.3.1.2 Where the HCA otherwise contributes to the development (e.g. by contributing land)
 Must meet the HCA Design and Quality Standards.
 - 7.3.2 The HCA will expect delivery to be carried out in accordance with its procurement policies.
 - 7.3.3 The SPIP must adhere to the HCA's requirements in relation to apprenticeships and skills training, including provision of Employment and Skills strategies, plans and method statements to achieve at least the HCA's minimum benchmarks and to report on monitoring and compliance.
 - 7.3.4 The Agency will expect adherence in all cases to its policies on Equality and Diversity and Community Engagement

- 7.3.5 The HCA reserves the right to insist on using its standard documentation in respect of any Financial Assistance or transactions relation to HCA land resulting from this Agreement
- 7.4 **Funding:** Subject to all necessary approvals and the availability of resources the Agency will endeavour to provide the investment from the following funding streams for 2010/11 onwards:
- 7.4.1.1 National Affordable Housing Programme
 - 7.4.1.2 Property and Regeneration Programme
 - 7.4.1.3 Growth Point Funding
 - 7.4.1.4 Places for Change
 - 7.4.1.5 Eco Town Funding
 - 7.4.1.6 Decent Homes
 - 7.4.1.7 Gypsies and Travellers
 - 7.4.1.8 LA New Build
 - 7.4.1.9 Public Land Initiative
- 7.4.10 Details of the HCA's funding commitments at the time of the initial version of this agreement (as allocated to individual localities) are contained in Appendix 1 of the LIA. This Appendix will be updated regularly through the SPIP and updates should be viewed alongside the agreement.
- 7.4.11 Decisions on funding priorities and associated specific project arrangements will be managed using the relevant assessment sheets in Appendix 5 and 6 of the LIP. The sheets include estimates of potential funding shortfalls. These Appendices in the LIP will be updated as required by the partners directly involved and details will be maintained alongside the regular update of Appendix 1 of the LIA.
- 7.5 **Other Agency resources:** Subject to all necessary approvals and the availability of resources the Agency also intends to provide:¹⁸
- 7.5.1 Land – (As of April 2010 the only land holding the HCA control in Oxfordshire is the Fair Mile Hospital Site)
 - 7.5.2 Advisory / Consultancy / Enabling / Training / Secondment / Joint Management
 - 7.5.3 Technical support – The HCA internal Land and Development Consultancy provide a range of technical advice including, design and sustainable place making, financial appraisal and viability advice, strategic planning and environmental sustainability
 - 7.5.4 Project Management
 - 7.5.5 ATLAS – enabling support on individual large scale projects based on high quality planning, transportation, urban design, infrastructure and environmental sustainability
 - 7.5.6 HCA – Skills & Knowledge Team

¹⁸ These are examples only – delete if not appropriate. Where possible, set out the headline detail for each type of resource e.g. broadly what it will cover, how often and for how long and by whom such support will be provided.

7.6 **SPIP resources:** the constituent councils intend to provide the following support¹⁹:

7.6.1 Funding / land / employees / use of Compulsory Purchase Powers (if considered appropriate, although nothing in this Agreement will fetter the Council's discretion as to whether or not it will exercise its CPO powers)²⁰

7.7 **Leverage of third party resources:** the HCA²¹ and the SPIP will work towards procuring²²:

7.7.1 other public funding for economic development / business analysis / skills / education / environment / transport / health

7.7.2 3rd sector involvement

7.7.3 Private sector investment

The Assessment sheets in Appendix 5 and 6 of the LIP will be used to indicate the arrangements for wider partner involvement (particularly private sector and housing association development partnerships and the role of other public agencies on infrastructure provision)

7.8 **Outputs and Outcomes:** The parties with lead responsibility for each locality will work together towards achieving the outcomes listed in Appendix 1 of the LIA and Part 3: Place Making of the LIP.

7.9 **Returns:** The HCA and SPIP will put into effect contractual arrangements to ensure that investments (other than normal scheme preparation / consultancy and grant payments) are recovered and recycled where appropriate.

7.10 **Timescales:** The key milestones for specific interventions are to be determined as part of detailed project management arrangements supporting the LIP (see 7.4.10/11 above). The overall LIP is managed on the basis of a 5 year plan where all schemes listed are regarded as deliverable in the short term (2010 – 2015). Detailed arrangements for interventions will be recorded and managed through update of the Assessment sheets at Appendices 5 and 6 of the Local Investment Plan as required. This will be undertaken by the partners directly involved in implementation. SPIP will receive reports on overall progress and the outcomes of progress monitoring will be included in the LIP when it is formally reviewed (see 8 below).²³

¹⁹ See the note relating to paragraph 7.5.

²⁰ Care must be taken to avoid any perception that the Council has pre-judged whether or not to use its CPO powers for a particular scheme.

²¹ If the Agency and the Council will be jointly responsible for leveraging some/all third party resources, rephrase to state that “the Agency and the Council will work together towards procuring”.

²² See the note relating to paragraph 7.5.

²³ List the major stages of the project along with indicative dates.

Intervention 1: Abingdon and Faringdon Locality²⁴ - (Former Nursery and Cricket Ground Faringdon, South of Park Road and Coxwell House, Coxwell Road, Faringdon, Old Gaol, Abingdon, Sutton Courtenay (2 Sites), Other Towns and Villages) (Refer to Page 21 of Local Investment Plan)

- 7.11 **Structure and Delivery:** the Agency's role in delivering interventions is to facilitate and assist the constituent council in delivering sustainable places at the local level.²⁵
- 7.11.1 The Vale of White Horse will be responsible for overall management and monitoring of the LIP and outcomes achieved.
- 7.11.2 The relevant partner (normally the lead council) identified at Appendix 5 of the LIP will designate a project manager for each specific intervention.
- 7.11.3 The SPIP Executive Group will require a monitoring report on overall progress every quarter.
- 7.11.4 Individual interventions will be sponsored by the South East Regional Director in the Agency and the relevant SPIP Executive Group representatives
- 7.11.5 The relevant partner (normally the lead council) will be the contracting party for specific interventions. It is envisaged that locally specific contracts will be required with relevant sector partners, relevant 3rd sector partners and private sector partners.
- 7.11.6 Either party may change the identity of the parties named above on written notice to the other, following consultation with the other party and taking their views into account.

Intervention 2 Banbury Locality²⁶ - (Bankside Urban Extension, Banbury Canalside) (Refer to Page 23 of Local Investment Plan)

- 7.12 **Structure and Delivery:** the Agency's role in delivering interventions is to facilitate and assist the constituent council in delivering sustainable places at the local level.²⁷
- 7.12.1 Cherwell will be responsible for overall management and monitoring of the LIP and outcomes achieved.
- 7.12.2 The relevant partner (normally the lead council) identified at Appendix 5 of the LIP will designate a project manager for each specific intervention.
- 7.12.3 The SPIP Executive Group will require a monitoring report on overall progress every quarter.

²⁴ Complete paragraphs 7.4-7.13 for each intervention envisaged.

²⁵ If the Council is not the accountable body, specify who is. State aid will need to be considered especially where the accountable body is not a public authority.

²⁶ Complete paragraphs 7.4-7.13 for each intervention envisaged.

²⁷ If the Council is not the accountable body, specify who is. State aid will need to be considered especially where the accountable body is not a public authority.

- 7.12.4 Individual interventions will be sponsored by the South East Regional Director in the Agency and the relevant SPIP Executive Group representatives .
- 7.12.5 The relevant partner (normally the lead council) will be the contracting party for specific interventions. It is envisaged that locally specific contracts will be required with relevant sector partners, relevant 3rd sector partners and private sector partners.
- 7.12.6 Either party may change the identity of the parties named above on written notice to the other, following consultation with the other party and taking their views into account.

Intervention 3 Bicester and Upper Heyford Locality²⁸ - (NW Bicester Eco Town, SW Urban Extension, Bicester Business Park, Gavray Drive, Former RAF Upper Heyford) (Refer to Page 25 of Local Investment Plan)

- 7.13 **Structure and Delivery:** the Agency's role in delivering interventions is to facilitate and assist the constituent council in delivering sustainable places at the local level.²⁹
- 7.13.1 Cherwell will be responsible for overall management and monitoring of the LIP and outcomes achieved
- 7.13.2 The relevant partner (normally the lead council) identified at Appendix 5 of the LIP will designate a project manager for each specific intervention
- 7.13.3 The SPIP Executive Group will require a monitoring report on overall progress every quarter.
- 7.13.4 Individual interventions will be sponsored by the South East Regional Director in the Agency and the relevant SPIP Executive Group representatives.
- 7.13.5 The relevant partner (normally the lead council) will be the contracting party for specific interventions. It is envisaged that locally specific contracts will be required with relevant sector partners, relevant 3rd sector partners and private sector partners.
- 7.13.6 Either party may change the identity of the parties named above on written notice to the other, following consultation with the other party and taking their views into account.

Intervention 4 Botley Locality³⁰ - (Timbmet, Tilbury Lane, Lime Road) (Refer to Page 27 of Local Investment Plan)

- 7.14 **Structure and Delivery:** the Agency's role in delivering interventions is to facilitate and assist the constituent council in delivering sustainable places at the local level.³¹

²⁸ Complete paragraphs 7.4-7.13 for each intervention envisaged.

²⁹ If the Council is not the accountable body, specify who is. State aid will need to be considered especially where the accountable body is not a public authority.

³⁰ Complete paragraphs 7.4-7.13 for each intervention envisaged.

³¹ If the Council is not the accountable body, specify who is. State aid will need to be considered especially where the accountable body is not a public authority.

- 7.14.1 Vale of White Horse will be responsible for overall management and monitoring of the LIP and outcomes achieved.
- 7.14.2 The relevant partner (normally the lead council) identified at Appendix 5 of the LIP will designate a project manager for each specific intervention.
- 7.14.3 The SPIP Executive Group will require a monitoring report on overall progress every quarter.
- 7.14.4 Individual interventions will be sponsored by the South East Regional Director in the Agency and the relevant SPIP Executive Group representatives .
- 7.14.5 The relevant partner (normally the lead council) will be the contracting party for specific interventions. It is envisaged that locally specific contracts will be required with relevant sector partners, relevant 3rd sector partners and private sector partners.
- 7.14.6 Either party may change the identity of the parties named above on written notice to the other, following consultation with the other party and taking their views into account.

Intervention 5 Didcot Locality³² - (Great Western Park (South), Great Western Park (Vale), Ladgrove East (South), Didcot NE Urban Extension (South)) (Refer to Page 29 of Local Investment Plan)

- 7.15 **Structure and Delivery:** the Agency’s role in delivering interventions is to facilitate and assist the constituent council in delivering sustainable places at the local level.³³
 - 7.15.1 Vale of White Horse and South Oxfordshire will be responsible for overall management and monitoring of the LIP and outcomes achieved.
 - 7.15.2 The relevant partner (normally the lead council) identified at Appendix 5 of the LIP will designate a project manager for each specific intervention.
 - 7.15.3 The SPIP Executive Group will require a monitoring report on overall progress every quarter.
 - 7.15.4 Individual interventions will be sponsored by the South East Regional Director in the Agency and the relevant SPIP Executive Group representatives
 - 7.15.5 The relevant partner (normally the lead council) will be the contracting party for specific interventions. It is envisaged that locally specific contracts will be required with relevant sector partners, relevant 3rd sector partners and private sector partners.
 - 7.15.6 Either party may change the identity of the parties named above on written notice to the other, following consultation with the other party and taking their views into account.

Intervention 6 Oxford Locality[Name of place, project or theme]³⁴ - (Small/Medium Windfall Sites, Oxford West End Renaissance, Barton,

³² Complete paragraphs 7.4-7.13 for each intervention envisaged.

³³ If the Council is not the accountable body, specify who is. State aid will need to be considered especially where the accountable body is not a public authority.

Small Regeneration Projects, Blackbird/Greater Leys, New Council House, Northern Gateway, Homelessness Projects) (Refer to Page 31 of Local Investment Plan)

- 7.16 **Structure and Delivery:** the Agency's role in delivering interventions is to facilitate and assist the constituent council in delivering sustainable places at the local level.³⁵
- 7.16.1 Oxford City Council will be responsible for overall management and monitoring of the LIP and outcomes achieved.
- 7.16.2 The relevant partner (normally the lead council) identified at Appendix 5 of the LIP will designate a project manager for each specific intervention.
- 7.16.3 The SPIP Executive Group will require a monitoring report on overall progress every quarter.
- 7.16.4 Individual interventions will be sponsored by the South East Regional Director in the Agency and the relevant SPIP Executive Group representatives.
- 7.16.5 The relevant partner (normally the lead council) will be the contracting party for specific interventions. It is envisaged that locally specific contracts will be required with relevant sector partners, relevant 3rd sector partners and private sector partners.
- 7.16.6 Either party may change the identity of the parties named above on written notice to the other, following consultation with the other party and taking their views into account.

Intervention 7 Science Vale Locality³⁶ - (Science Vale UK) (Refer to Page 33 of Local Investment Plan)

- 7.17 **Structure and Delivery:** the Agency's role in delivering interventions is to facilitate and assist the constituent council in delivering sustainable places at the local level.³⁷
- 7.17.1 Vale of White Horse will be responsible for overall management and monitoring of the LIP and outcomes achieved.
- 7.17.2 The relevant partner (normally the lead council) identified at Appendix 5 of the LIP will designate a project manager for each specific intervention.
- 7.17.3 The SPIP Executive Group will require a monitoring report on overall progress every quarter.
- 7.17.4 Individual interventions will be sponsored by the South East Regional Director in the Agency and the relevant SPIP Executive Group representatives .

³⁴ Complete paragraphs 7.4-7.13 for each intervention envisaged.

³⁵ If the Council is not the accountable body, specify who is. State aid will need to be considered especially where the accountable body is not a public authority.

³⁶ Complete paragraphs 7.4-7.13 for each intervention envisaged.

³⁷ If the Council is not the accountable body, specify who is. State aid will need to be considered especially where the accountable body is not a public authority.

- 7.17.5 The relevant partner (normally the lead council) will be the contracting party for specific interventions. It is envisaged that locally specific contracts will be required with relevant sector partners, relevant 3rd sector partners and private sector partners.
- 7.17.6 Either party may change the identity of the parties named above on written notice to the other, following consultation with the other party and taking their views into account.

Intervention 8 Thame and Chinnor Locality³⁸ - (Thame Extension, Thame United Football Club, Chinnor Cement Works, Chinnor) (Refer to Page 35 of Local Investment Plan)

- 7.18 **Structure and Delivery:** the Agency's role in delivering interventions is to facilitate and assist the constituent council in delivering sustainable places at the local level.³⁹
- 7.18.1 South Oxfordshire will be responsible for overall management and monitoring of the LIP and outcomes achieved.
- 7.18.2 The relevant partner (normally the lead council) identified at Appendix 5 of the LIP will designate a project manager for each specific intervention
- 7.18.3 The SPIP Executive Group will require a monitoring report on overall progress every quarter.
- 7.18.4 Individual interventions will be sponsored by the South East Regional Director in the Agency and the relevant SPIP Executive Group representatives
- 7.18.5 The relevant partner (normally the lead council) will be the contracting party for specific interventions. It is envisaged that locally specific contracts will be required with relevant sector partners, relevant 3rd sector partners and private sector partners.
- 7.18.6 Either party may change the identity of the parties named above on written notice to the other, following consultation with the other party and taking their views into account.

Intervention 9 Wallingford and Cholsey Locality⁴⁰ - (Fair Mile Hospital, Wallingford Extension) (Refer to Page 37 of Local Investment Plan)

- 7.19 **Structure and Delivery:** the Agency's role in delivering interventions is to facilitate and assist the constituent council in delivering sustainable places at the local level.⁴¹
- 7.19.1 South Oxfordshire will be responsible for overall management and monitoring of the LIP and outcomes achieved.

³⁸ Complete paragraphs 7.4-7.13 for each intervention envisaged.

³⁹ If the Council is not the accountable body, specify who is. State aid will need to be considered especially where the accountable body is not a public authority.

⁴⁰ Complete paragraphs 7.4-7.13 for each intervention envisaged.

⁴¹ If the Council is not the accountable body, specify who is. State aid will need to be considered especially where the accountable body is not a public authority.

- 7.19.2 The relevant partner (normally the lead council) identified at Appendix 5 of the LIP will designate a project manager for each specific intervention.
- 7.19.3 The SPIP Executive Group will require a monitoring report on overall progress every quarter.
- 7.19.4 Individual interventions will be sponsored by the South East Regional Director in the Agency and the relevant SPIP Executive Group representatives.
- 7.19.5 The relevant partner (normally the lead council) will be the contracting party for specific interventions. It is envisaged that locally specific contracts will be required with relevant sector partners, relevant 3rd sector partners and private sector partners.
- 7.19.6 Either party may change the identity of the parties named above on written notice to the other, following consultation with the other party and taking their views into account.

Intervention 10 Wantage, Grove and Harwell Locality⁴² - (Grove Airfield, Grove, St Johns, NE, Wantage, Chilton Fields, Harwell, N Harwell Science and Innovation Campus) (Refer to Page 39 of Local Investment Plan)

- 7.20 **Structure and Delivery:** the Agency's role in delivering interventions is to facilitate and assist the constituent council in delivering sustainable places at the local level.⁴³

- 7.20.1 Vale of White Horse will be responsible for overall management and monitoring of the LIP and outcomes achieved.
- 7.20.2 The relevant partner (normally the lead council) identified at Appendix 5 of the LIP will designate a project manager for each specific intervention.
- 7.20.3 The SPIP Executive Group will require a monitoring report on overall progress every quarter.
- 7.20.4 Individual interventions will be sponsored by the South East Regional Director in the Agency and the relevant SPIP Executive Group representatives .
- 7.20.5 The relevant partner (normally the lead council) will be the contracting party for specific interventions. It is envisaged that locally specific contracts will be required with relevant sector partners, relevant 3rd sector partners and private sector partners.
- 7.20.6 Either party may change the identity of the parties named above on written notice to the other, following consultation with the other party and taking their views into account.

Intervention 11 West Oxfordshire Strategic Sites Locality⁴⁴ - (Chipping Norton, Carterton Expansion, Carterton, West Witney/ North

⁴² Complete paragraphs 7.4-7.13 for each intervention envisaged.

⁴³ If the Council is not the accountable body, specify who is. State aid will need to be considered especially where the accountable body is not a public authority.

⁴⁴ Complete paragraphs 7.4-7.13 for each intervention envisaged.

Curbridge SDA, Market Town Schemes) (Refer to Page 43 of Local Investment Plan)

- 7.21 **Structure and Delivery:** the Agency's role in delivering interventions is to facilitate and assist the constituent council in delivering sustainable places at the local level.⁴⁵
- 7.21.1 West Oxfordshire will be responsible for overall management and monitoring of the LIP and outcomes achieved
 - 7.21.2 The relevant partner (normally the lead council) identified at Appendix 5 of the LIP will designate a project manager for each specific intervention
 - 7.21.3 The SPIP Executive Group will require a monitoring report on overall progress every quarter
 - 7.21.4 Individual interventions will be sponsored by the South East Regional Director in the Agency and the relevant SPIP Executive Group representatives
 - 7.21.5 The relevant partner (normally the lead council) will be the contracting party for specific interventions. It is envisaged that locally specific contracts will be required with relevant sector partners, relevant 3rd sector partners and private sector partners
 - 7.21.6 Either party may change the identity of the parties named above on written notice to the other, following consultation with the other party and taking their views into account

Intervention 12 Rural Housing Locality⁴⁶ - (Cherwell, South, West, Vale)
(Refer to Page 43 of Local Investment Plan)

- 7.22 **Structure and Delivery:** the Agency's role in delivering interventions is to facilitate and assist the constituent council in delivering sustainable places at the local level.⁴⁷
- 7.22.1 SPIP will be responsible for overall management and monitoring of the LIP and outcomes achieved
 - 7.22.2 The relevant partner (normally the lead council) identified at Appendix 5 of the LIP will designate a project manager for each specific intervention
 - 7.22.3 The SPIP Executive Group will require a monitoring report on overall progress every quarter
 - 7.22.4 Individual interventions will be sponsored by the South East Regional Director in the Agency and the relevant SPIP Executive Group representatives
 - 7.22.5 The relevant partner (normally the lead council) will be the contracting party for specific interventions. It is envisaged that

⁴⁵ If the Council is not the accountable body, specify who is. State aid will need to be considered especially where the accountable body is not a public authority.

⁴⁶ Complete paragraphs 7.4-7.13 for each intervention envisaged.

⁴⁷ If the Council is not the accountable body, specify who is. State aid will need to be considered especially where the accountable body is not a public authority.

locally specific contracts will be required with relevant sector partners, relevant 3rd sector partners and private sector partners

7.22.6 Either party may change the identity of the parties named above on written notice to the other, following consultation with the other party and taking their views into account

7.23 **Change control:** if SPIP believes that the timescales and/or scheme outcomes outputs referred to in this agreement will not be achieved, they will discuss the reasons why and agree a revised programme and/or outputs. Any changes to anticipated expenditure and receipts will also need to be approved in writing by the relevant partners through detailed contracting arrangements for the relevant scheme and intervention. If timescales, outputs and/or anticipated expenditure/receipts are not achieved, the SPIP reserves the right to consider requiring repayment of funding and other resources provided and/or reallocation to an alternative intervention.

MONITORING AND REPORTING

8.1 The SPIP will collate monitoring data on a quarterly basis and share this information widely. The information for each intervention is to be collated into one report by reference back to the objectives set out in paragraph 2.3 above.

8.2 The SPIP will review the objectives report (arising from 8.1 above) regularly to consider progress made, and, at 18 month intervals, will formally decide whether the LIP itself and the terms of this Agreement should be reviewed and/or amended.

RISK MANAGEMENT

9.1 The SPIP has identified the following general risk factors:

9.1.1 Limited Public Sector Funding available

9.1.2 No robust regional or local level Planning Policy in place

9.1.3 Lack of Public and Political Support

9.1.4 Land Ownership Issues⁴⁸

9.2 The SPIP will manage risk using the assessment sheets at Appendices 5 and 6 of the LIP. And will undertake the following in order to mitigate the above risks:

9.2.1 Ensure early liaison with relevant public sector partners

9.2.2 Provide a strong evidence base to support the relevant planning documents

9.2.3 Undertake early, comprehensive consultation with Council Members and Local Community

9.2.4 Early engagement with landowners

⁴⁸ Set out the main risks - this may be by reference to individual interventions.

- 9.3 The regular update of Appendices 5 and 6 of the LIP will provide an agreed current risk plan relating to individual schemes and interventions. This will support this Agreement.

ADDED VALUE

- 10.1 The parties will work to achieve the shared ambitions identified within the Local Investment Plan⁴⁹

TIMETABLE

- 11.1 This Agreement will commence on 30th June 2010 and covers the five year period 2010 – 2015. This Agreement will automatically end, or be renewed, five years from that date⁵⁰. Either party can withdraw from this Agreement on written notice to the other party (subject to paragraph 12).

GENERAL PROVISIONS

In consideration of the parties agreeing entering into negotiations for achieving the objectives set out in paragraph 2, the parties agree to be bound by the following sub paragraphs:

- 12.1 **Confidentiality and Freedom of Information:** each party recognises that it may receive confidential information (which should be marked as such) belonging to the other in connection with this Agreement. Neither party will disclose any such confidential information without the other party's prior written consent subject to paragraph 13.2.

The parties are both subject to various statutory requirements including in the Freedom of Information Act 2000 and the Environmental Information Regulations 2004, which may oblige them to disclose information if required to do so. The parties will co-operate with each other to fulfil their statutory duties.

- 12.2 **Publicity:** any public announcements relating to this Agreement and its subject matter must be agreed with the other party in advance of the announcement.
- 12.3 **Dispute resolution:** if there is a disagreement over the terms of this Agreement, it will be escalated to Chief Executive / Director levels within the SPIP. If they cannot agree within a reasonable timescale, the matter will be referred to an appropriate expert for determination.
- 12.4 **Governing law and jurisdiction:** the terms of this Agreement will be governed by and construed in accordance with English law.

⁴⁹ Consider whether the additional benefits should be included in the objectives report (see paragraph 8).

⁵⁰ Fix a longstop date which gives sufficient time for parties to perform.

12.5 The parties agree to be legally bound by the provisions of this Section (12).

TIMEBOUND TARGETS

13.1 *Formal review of the LIP to be completed at 18 month intervals from the date of this agreement*

13.2 *50% of the housing development sites individually identified and listed as priority projects in the LIP to be started on site by 2013⁵¹*

Signed for and on behalf of Homes and Communities by xxxxxxxx Signed:

Name:

Position:

Authorised Signatory

For and on behalf of []⁵²

Date:

Date:

Annexures

Table showing current HCA Committed Funding (to be reviewed and updated quarterly)

Plan showing the extent of the Area

Local Investment Plan

[Other relevant documents, studies or reports]

Summary intervention plan

Risk plan

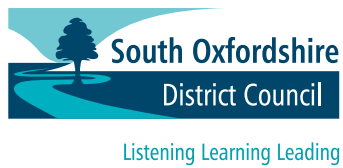
⁵¹ Targets must be clearly defined and easily understood by both parties.

⁵² Insert full name of (each) local authority – as per point 1.2. Depending on the constitutional make up of any local authority grouping, each authority may need to sign separately.



Oxfordshire Local Investment Plan

Spatial Planning and Infrastructure Partnership



Foreword



I know I speak for all the District Councils in Oxfordshire and the County Council too when I say how pleased we were when Oxfordshire was selected by the Homes and Communities Agency (HCA) as

one of the pilot areas for their new Single Conversation. We agreed with the HCA that the Spatial Planning and Infrastructure Partnership (SPIP) and its supporting Executive Group would conduct the Single Conversation on behalf of Oxfordshire. We are grateful to David Edwards, Regional Director for the South East, and his team for selecting us as one of their pilots and for working with us to prepare this Local Investment Plan (LIP).

The LIP outlines and integrates, for the first time, the housing, economic development and infrastructure plans for the next 20 years of Cherwell, Oxford, South Oxfordshire, Vale of White Horse and West Oxfordshire District Councils, Oxfordshire County Council, the Oxfordshire Primary Care Trust, the Highways Agency, Network Rail, and the Environment Agency. It lays out how we are all working together to deliver new housing as part of creating sustainable communities.

This LIP provides a robust foundation for our continuing conversation with the HCA as we move on to discuss and agree the Local Investment Agreement. We will do this in light of the publication of the Comprehensive Spending Review (CSR) and confirmation of the nature of future HCA funding streams and the funds allocated to the South East and Oxfordshire.

At the same time, the LIP adds value to a number of current discussions, including economic development across the county, the next Local Transport Plan, and the five Local Development Frameworks. It is necessarily an evolving document, which we will review and update regularly.

We finalise this LIP just as we are heading into a General Election. Much of the national and regional strategic framework under which we have developed this document could look very different in the future. I believe we are better prepared to respond to potential future changes now we have this LIP.

Councillor Barry Wood

Chairman, Oxfordshire Spatial Planning and Infrastructure Partnership

31 March 2010

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Executive summary

Introduction

This Local Investment Plan (LIP) for Oxfordshire, finalised in March 2010, is the first formal document resulting from Oxfordshire's Single Conversation with the Homes and Communities Agency (HCA). The 'Single Conversation' is the process through which local authorities, in collaboration with the HCA, the Government Office for the South East (GOSE) and other key partners, develop a LIP and a Local Investment Agreement (LIA). Oxfordshire was chosen as one of three pilot areas in the South East, the others being Kent, Thames Gateway and Portsmouth and Urban South Hampshire (PUSH).

While local authorities have a leading role in developing the Single Conversation, reflecting their responsibilities in setting out future ambitions and visions for their areas, other key stakeholders also need to be involved. This LIP has been prepared by the Oxfordshire Spatial Planning and Infrastructure Partnership (SPIP) and sets out a shared vision and priorities for delivering housing growth, economic development, regeneration, and infrastructure; in other words 'sustainable place making'.

This LIP outlines and integrates the plans of Cherwell, Oxford, South Oxfordshire, Vale of White Horse and West Oxfordshire District Councils, Oxfordshire County Council, the Highways Agency, Network Rail, the Environment Agency and the Oxfordshire Primary Care Trust to deliver housing and economic growth and associated strategic infrastructure to 2030. Collectively, these plans will begin to meet the requirements of the South East Plan, the Regional Economic Strategy, the five Local Development Frameworks, Oxfordshire 2030, and the five District Sustainable Community Strategies.

Our opportunities and challenges

This LIP responds to the opportunities and challenges in housing growth and economic development that the members of the Oxfordshire SPIP are tackling individually and collectively.

Oxfordshire is renowned as a place of architectural and natural beauty. The internationally famous city of Oxford is at the heart, with a series of historic market towns serving communities across the county and including Abingdon; Banbury; Bicester; Henley; Thame; Wallingford; Wantage and Witney. Oxfordshire has many villages set in attractive countryside, including three areas of outstanding natural beauty: the Chilterns; the Cotswolds and North Wessex Downs.

Oxfordshire is also acknowledged internationally as a centre of excellence for learning and research, with the highest concentration of science and biotechnology industries in Western Europe. It plays a critical role in the regional, national and, in many respects, international economies.

Over the next 20 years, we expect significant population and development growth across Oxfordshire. All SPIP partners face difficulties in managing that growth in a way that meets economic, housing and regeneration pressures and provides sufficient infrastructure. At the same time, the environmental quality of the county and our impact on environmental sustainability are major considerations for us.

Economic prosperity and quality of environment make Oxfordshire an attractive place. But there are pockets of deprivation where residents have low wages, few skills and poor housing; where young people do not fulfil their potential at school; and where older people have poorer health and significantly shorter life expectancy. The LIP can play a vital part in tackling these issues.

Our priorities

This LIP has four overall strategic objectives – to:

- deliver new housing, including affordable homes
- support economic growth
- achieve regeneration and tackle deprivation, and
- contribute to meeting strategic infrastructure needs.

The LIP focuses mainly on our five-year county-wide development programme to meet these strategic objectives. All the schemes outlined in this document are priorities for Oxfordshire, given the pressing need for more homes and for the transport, employment, education and other infrastructure they will require.

From our five-year development programme we have derived a shortlist of the 17 housing schemes and 36 strategic infrastructure schemes we believe to be top priorities. Some of the housing schemes already have planning permission. Others are likely to be granted planning permission soon. Taken together, these 17 housing schemes could deliver over 17,000 new homes, 7,200 of which would be ‘affordable’ (contributing to a South East Plan 2006–2026 requirement for 55,000 new homes, of which 22,000 need to be affordable).

Many of the schemes in our overall five-year programme will come forward without public-sector intervention from the HCA or any other organisation. However, these shortlisted schemes are those we would like the HCA to treat as being the highest priorities for immediate public-sector investment. We will review this shortlist again once we know the nature and extent of future HCA funding, and may draw other or alternative schemes from the overall development programme onto this shortlist as a result.

Place making across Oxfordshire

We consider housing growth and strategic infrastructure investment as a whole in 11 key urban localities. We also consider housing growth and strategic infrastructure across all the rural areas as in effect a twelfth locality. The localities are:

- Abingdon and Faringdon
- Banbury
- Bicester and Upper Heyford
- Botley
- Didcot
- Oxford
- Science Vale UK
- Thames and Chinnor
- Wallingford and Cholsey
- Wantage, Grove and Harwell
- West Oxfordshire strategic sites
- Rural housing sites across Cherwell, South Oxfordshire, Vale of White Horse and West Oxfordshire.



Next steps

The LIP is a living document. The SPIP will review it every 18 months to ensure it reflects the evolution of the five Local Development Frameworks and other local strategies as well as national and regional strategies. The SPIP will also need to review how far we proceed with short-term housing and infrastructure plans in light of continuing market difficulties.

The priorities identified in this LIP will inform the development of Oxfordshire's Local Investment Agreement (LIA) with the HCA. The SPIP and the HCA are working together to produce the LIA, which will detail future HCA funding commitments, by end of June 2010.

The LIP's overview of the public sector investment required to deliver affordable housing and infrastructure will provide a firm foundation for discussion with other national, regional and sub-regional agencies around how they might best support local development aspirations.

SPIP partners will also seek to engage other partners in this LIP. House builders, for example, both private and social, have a central role in delivering the housing growth in Oxfordshire and need to understand this LIP. We hope the document will lead to greater certainty and clarity among all stakeholders.

The LIP will support the SPIP in informing and testing the Local Transport Plan 3 (LTP3) as it progresses through crucial consultation stages. The LIP will also influence the economic development policies and actions that will emerge from the review of the Oxfordshire Economic Strategy. It will be vital in informing SPIP members' individual and collective thinking on the infrastructure required through S106 agreements, the new Community Infrastructure Levy or other ways of getting contributions from developments in the future.

Part 1: Our vision

Context

Oxfordshire is renowned as a place of architectural and natural beauty. The internationally famous city of Oxford is at the heart, with a series of historic market towns serving communities across the county and including Abingdon; Banbury; Bicester; Henley; Thame; Wallingford; Wantage and Witney. Oxfordshire has many villages set in attractive countryside, including three areas of outstanding natural beauty: the Chilterns; the Cotswolds and North Wessex Downs.

Oxfordshire is acknowledged internationally as a centre of excellence for learning and research, with the highest concentration of science and biotechnology industries in Western Europe. Some of the world's foremost academic institutions and major research and development organisations are here. The University of Oxford and Oxford Brookes University have strong links to a network of high technology companies located throughout the county. 'Science Vale UK', in the southern part of the county, is a concentration of important research establishments, including the Harwell Science and Innovation Campus; Milton Park, Didcot; and Wantage and Grove.

Over the next 20 years, we expect significant population and development growth across Oxfordshire. All SPIP partners face difficulties in managing that growth in a way that meets economic, housing and regeneration pressures and provides sufficient infrastructure. At the same time, the environmental quality of the county and our impact on environmental sustainability are major considerations for us.

Over the next 20 years Oxfordshire's population is expected to grow by 12 per cent, while over the same period the number of people aged 75 and over is expected to grow by 60 per cent. The number of people aged over 85 is expected to double.

Growth in the number of older people has implications for the type of housing and services that will be needed. It will be critical to ensure that appropriate housing and support are available for our older people, to enable them to remain independent or live in homely environments in the community (or both) for as long as possible.

The South East Plan provides for the building of over 55,000 new homes between 2006 and 2026, of which 22,000 homes should be affordable. Within the South East Plan, Central Oxfordshire is established as a sub-region, with Oxford providing higher-order services (including retail, health, and education) for the surrounding area. This sub-region has been identified as one of eight 'Diamonds for Investment and Growth' in the Regional Economic Study and will provide much of Oxfordshire's housing growth. The main locations identified for development are Bicester; Didcot; Oxford; and Wantage and Grove. Bicester has been selected as one of the first four government-backed eco towns in the country, with a 5,000-home eco development at NW Bicester.

Outside the major towns, Oxfordshire is mainly a rural county, with a large number of villages and hamlets. Access to affordable housing in rural areas is restricted by the small number of properties coming onto the market. The effect is a lack of new housing options and the departure of young people from rural areas.

There will be a need for considerable investment in new infrastructure to meet the pressures on essential services such as schools, transport and other community facilities against a background of reducing spending by the public sector.

Public transport increases access to jobs and services, and reduces road congestion and carbon emissions. While Oxford has an extensive public transport system, many parts of Oxfordshire experience real isolation and would greatly benefit from improved public transport services and infrastructure.

A rapid and substantial growth in demand for primary school places is forecast over the period to 2016. Oxfordshire's 43 secondary and special schools are being included in the Building Schools for the Future programme – the government's largest public works programme. The multi-million pound programme will be carried out in six phases over the next 15–20 years. The project aims to raise educational achievement in Oxfordshire by providing world-class learning facilities, inspiring young people to realise their potential.

Economic prosperity and quality of environment make Oxfordshire an attractive place. But there are pockets of deprivation where residents have low wages, few skills and poor housing; where young people do not fulfil their potential at school; and where older people have poorer health and significantly shorter life expectancy. The LIP can play a vital part in tackling these issues.

Vision

The Oxfordshire Partnership sets out in Oxfordshire 2030 (Oxfordshire's Sustainable Community Strategy) a vision based on the following ambitions:

- create a world-class economy for Oxfordshire, building particularly on the high-tech sector
- have healthy and thriving communities to sustain what is good about the city, towns and villages while also responding to the needs of the 21st century, including the impact of demographic and lifestyle changes
- look after the environment and respond to the threat of climate change and the potential for more extreme weather conditions, particularly the threat of flooding
- break the cycle of deprivation by addressing the regeneration needs of disadvantaged communities; reducing the gap between the best and worst off, and

helping people maximise their talents and raise their aspirations.

Each local authority has developed its own vision, ambitions and priorities for its area, which inform and are informed by the Oxfordshire 2030 vision. A summary of each community strategy and corporate plan is set out in Appendix 2.

Strategic objectives

Four strategic objectives for this LIP result from this vision. They are of equal weight and have been used to arrive at the LIPs priorities. The strategic objectives are to:

- deliver new housing, including affordable homes
- support economic growth
- achieve regeneration and tackle deprivation, and
- contribute to meeting strategic infrastructure needs.

Deliver new housing, including affordable homes

Oxfordshire has a tremendous need for more housing of various types. Challenges include:

- the need for affordable homes
- geographic demands, both urban and rural
- providing for a variety of household sizes, particularly for young families and the elderly
- the need to provide supportive housing for those with physical or learning disabilities, and
- the demand for specialist housing e.g. Gypsy and Traveller sites.

This LIP identifies 43 priority housing-led schemes that are deliverable in the next five years. While these schemes vary by

location and scale, the common aim is to deliver housing, including affordable homes, to support the local economy and the development of healthy and thriving communities. These schemes could deliver 21,520 homes by 2015, of which 8,946 would be affordable.

At the same time we will continue to maximise the use of existing stock, fill empty properties and encourage under-occupiers to move to smaller accommodation – all of which help meet housing need as well as wider objectives.

Support economic growth

While Oxfordshire has a strong economy, attributed in part to the knowledge-based industries centred on Oxford and Science Vale UK, we have been affected by the global economic crisis. As the country comes out of the recession, it is particularly important to maintain a strong diverse economy and provide opportunities for growth and inward investment. In the past, we have been too complacent. The challenges ahead mean we must take a proactive approach. This includes allocating more land for economic development. The priority employment-led economic development schemes in this LIP include Bicester Business Park, Oxford and Science Vale UK. We also seek to raise educational attainment, improve skill levels to support the needs of local businesses, and help young people find work.

Achieve regeneration and tackle deprivation

There are pockets of relative deprivation in Oxfordshire, characterised by poorer housing stock, limited access to job opportunities, lower-paid jobs, limited educational attainment, poor health and shorter life expectancy. Regeneration is about tackling social and economic issues as well as about the physical changes to an area.

In Oxfordshire, the places with the highest levels of deprivation are parts of Banbury and Oxford. The priority regeneration schemes are the Canalside area in Banbury and Barton, and Blackbird Leys, Greater Leys, Rose Hill and Wood Farm in Oxford. These schemes provide particular benefits in tackling the cycle of deprivation through revitalising each area to improve the quality of life for residents and businesses.

Oxford also has a homelessness problem. Over recent years, partners in Oxford have done great work to provide services and programmes for the homeless, but the city still attracts homeless people from across the region. Oxford continues to work on several homelessness projects, including the Old Fire Station.

Contribute to meeting strategic infrastructure needs

In this LIP we distinguish between key infrastructure needed for housing and economic growth, such as a new hospital or improvements to a motorway junction ('strategic' infrastructure), and the infrastructure needed as a direct result of a single development, such as an extension to a school ('mitigation' infrastructure).

Building strategic infrastructure helps create a complete place by providing access and amenities or contributing to the overall sustainability of the existing or new community. Strategic infrastructure is important to the delivery of many of the housing, employment or regeneration-led schemes identified in this LIP.

Through the Single Conversation, 47 strategic infrastructure schemes have been identified. These cover:

- public transport facilities
- improvements to and additional road schemes
- education programmes and facilities
- community amenities, facilities and services

- improvements to hospitals and emergency services
- waste management sites, and
- green infrastructure to improve energy efficiency, mitigate the effects of climate change and create more sustainable places.

We will need to invest heavily in transport to facilitate new development; improve accessibility by alternative modes of transport; and enable people to get to work, education and other key services. Key to this will be:

- enabling the A34, and the network in its vicinity, to fulfil its various local and international roles
- securing improvements to junctions 9 and 10 of the M40
- delivering strategic rail network enhancements, such as the East-West rail and Evergreen (Chiltern Rail) projects
- implementing 'Access to Oxford', and
- transforming transport in Oxford.

Shared ambitions

A series of shared ambitions for Oxfordshire underpins the vision and strategic objectives:

Economy

- create a world-class economy – as a world leader in education, science and technology
- contribute to and benefit from economic prosperity
- create prosperous, inclusive and thriving communities in urban and rural areas
- provide good access to a range of jobs.

Education and skills

- develop an educated and skilled workforce
- provide services to ensure that everyone can realise their potential.

Housing and affordable housing

- deliver more housing, including affordable housing and key worker housing
- provide good access to a range of housing options
- create high-quality and sustainable homes
- regenerate areas and communities.
- provide for more rural housing
- provide decent Gypsy and Traveller sites that offer access to sufficient services.

Health and social inclusion

- create safer, stronger, healthier, more cohesive communities
- break the cycle of deprivation through the regeneration of disadvantaged communities, and reduce inequalities
- provide for an ageing population, for example offering opportunities for independent living
- encourage active participation in local communities
- provide good access to a range of services.

Infrastructure

- coordinate infrastructure investments to support new development
- improve existing infrastructure, including public transport, to facilitate access to employment and services.

Services (especially rural services)

- maintain or enhance local services, particularly in rural communities
- improve access to basic services by alternative modes of transport.

Sustainability

- ensure everyone can feel safe and enjoy life
- meet the needs of current and future generations without compromising the natural and built heritage or significantly changing the intrinsic character of the district
- continue to make Oxfordshire one of the best places to visit or live, work and play in
- ensure new development respects and complements the distinctive character of Oxfordshire
- maintain a network of safe, inclusive, vibrant and prosperous market towns and villages
- create and maintain a healthy and attractive environment.

Environment

- ensure an outstanding environment and high quality of life
- look after our environment
- improve the quality of our built environment.

Climate change

- reduce greenhouse gas emissions to mitigate adverse impacts of climate change, through:
 - zero carbon developments, and
 - waste and carbon reduction
- adapt to cope with the impacts of climate change, particularly flooding
- Provide alternative transport options.

Part 2: Our priorities

How we decided our priorities

Our prioritisation criteria are set out in Appendix 3. They have been used to identify the housing growth and associated infrastructure schemes in our five-year development programme. For each scheme we have considered:

- whether it is achievable in the short term
- whether it accords with and links to long-term plans
- how it will promote housing and economic development
- its wider benefits, including social, transport and sustainability
- the overall investment required
- value for money
- an assessment of the risk.

Appendix 5 includes a detailed assessment sheet for each scheme.

Development programme 2010–15

Over the next five years the priority development programme for Oxfordshire comprises 97 schemes:

- 43 housing schemes
- 3 economic development schemes
- 4 regeneration schemes, and
- 47 strategic infrastructure schemes.

Taken together, these schemes could deliver 22,920 homes, including 9,226 affordable homes.

Shortlist 2010–15

From this five-year programme we have produced a shortlist of 17 housing schemes (shown in Table 1). These schemes are seen as the most important by SPIP partners, and best meet the prioritisation criteria in Appendix 3. This highest-priority list could deliver 17,713 homes, including 7,237 affordable homes, over the next five years. It is important to note that these are the agreed priorities as we publish this Local Investment Plan in March 2010. All SPIP partners think that every scheme on the long list of short-term deliverable schemes requires funding. However, if there is not enough money in the future to pay for all the short-term deliverable schemes, funds should be used for the highest-priority shortlist.

Table 2 identifies the strategic infrastructure necessary to deliver these 17 top-priority housing schemes.

Development programme to 2030

Each local authority has also taken a long-term view of which sites and schemes are likely to come forward over the next 20 years (2010–30). The long-term sites are identified mainly on evidence from the Strategic Housing Land Availability Assessments and the emerging Local Development Frameworks, and the local knowledge of the housing and planning teams. This information is key when taking a long-term view of the development pressures facing an area, and the infrastructure needed. The long-term development programme for each district is in Appendix 6.

Table 1: Top-priority growth schemes ('shortlist') deliverable in the short term 2010–15

District	Scheme	Total homes 2010 –2030	Number of homes 2010 –2015	Number of affordable homes 2010 –2015
Oxford	Oxford small and medium sites (including Blackbird/ Greater Leys and windfalls) (HRA land capacity tbc)	n/a	3,222	1,344
South / Vale	Didcot new growth point area (part of Science Vale UK)	5,742	2,000	640
ALL	Oxfordshire rural housing schemes	n/a	1,498	1,023
Vale	Wantage, Grove and Harwell (part of Science Vale UK)	4,675	1,401	446
Cherwell	NW Bicester Eco Town, Bicester	5,000	1,250	300
Cherwell	Banbury Canalside, Banbury	1,200	1,200	180
Cherwell	SW Bicester urban extension, Bicester	1,585	1,000	476
ALL	Oxfordshire extra-care schemes	n/a	900	600
Vale	Abingdon and Faringdon	2,059	959	382
Oxford	Oxford West End renaissance project	830	830	415
West	West Oxfordshire large strategic sites	1,400	700	280
South	Wallingford and Cholsey	1,103	603	241
Oxford	Barton (including regeneration of Barton and Northway Estates)	1,000	500	250
West	West Oxfordshire small and medium market town schemes	2,000	500	200
South	Thame and Chinnor	1,128	478	191
Vale	Botley	472	472	189
West	Carterton Expansion, Carterton	1,000	200	80
Total: 17 Schemes (min)		n/a	17,713	7,237

Table 2: Strategic infrastructure schemes to deliver top-priority growth schemes in the short term 2010–15

District	Infrastructure scheme	Area linked to infrastructure	Lead agency
ALL	Access to Oxford	Oxford	Oxfordshire County Council
ALL	Chiltern Railways Evergreen 3 Project	Oxford, Bicester and Upper Heyford	Chiltern Railways
ALL	East West Rail (western section)	Oxford, Bicester and Upper Heyford	East West Rail Consortium / DfT
ALL	Transport schemes identified through LTP3 process 2011 to 2030	Oxfordshire wide	Oxfordshire County Council
Cherwell	Banbury priority north-south vehicular corridor	Banbury	Oxfordshire County Council
Cherwell	Bicester Community Hospital, Bicester	Bicester and Upper Heyford	Oxfordshire PCT
Cherwell	Bicester Park and Ride Facility	Bicester and Upper Heyford	Oxfordshire County Council
Cherwell	M40 Junction 9 improvements	Bicester and Upper Heyford	Highways Agency
Cherwell	SW Bicester perimeter road	Bicester and Upper Heyford	Oxfordshire County Council
Cherwell	Transport improvements at and around Bicester	Bicester and Upper Heyford	Oxfordshire County Council
Cherwell	Primary schools (new) to support growth (Banbury 1 school, Bicester 3 schools)	Banbury, Bicester	Oxfordshire County Council
Cherwell	Secondary schools (new) to support growth (Bicester 1 school)	Bicester	Oxfordshire County Council
Oxford	Primary schools provision to support growth (Barton, Blackbird Leys, West End)	Oxford	Oxfordshire County Council
Oxford	Secondary schools (BSF) programme (2 schools – Cheney and Iffley Mead)	Oxford	Oxfordshire County Council
South	Didcot town centre phase two development	Didcot/Science Vale UK	South Oxfordshire District Council
South	Didcot northern perimeter road Phase 3	Didcot/Science Vale UK	Oxfordshire County Council
South	Cow Lane Underpass, Didcot	Didcot/Science Vale UK	Oxfordshire County Council

continued

Table 2: Strategic infrastructure schemes to deliver top-priority growth schemes in the short term 2010–15

District	Infrastructure scheme	Area linked to infrastructure	Lead agency
South	Didcot Parkway station interchange	Didcot/Science Vale UK	Oxfordshire County Council
South	Didcot Parkway (Foxhall Car Park and pedestrian improvements)	Didcot/Science Vale UK	Oxfordshire County Council
South / Vale	Accessing Science Vale UK transport package	Didcot/Science Vale UK / Wantage, Grove and Harwell	Oxfordshire County Council/ Highways Agency
South /Vale	Primary schools (new) to support growth (5 schools)	Didcot	Oxfordshire County Council
South / Vale	Secondary schools (new) to support growth (1 school)	Didcot	Oxfordshire County Council
South / Vale	Science Vale UK Learning Park	Didcot/Science Vale UK	Vale of White Horse District Council/SVUK Board
South / Vale	Science Vale UK High Speed Broadband Access	Science Vale UK	SVUK Board/ SEEDA
South	Thornhill Park and Ride, Oxford	Oxford	Oxfordshire County Council
South	Primary school (new) to support growth (Wallingford 1 school)	Wallingford and Cholsey	Oxfordshire County Council
Vale	Abingdon Town Centre Improvements	Abingdon and Faringdon	Vale of White Horse District Council
Vale	Primary school (new) to support growth (Faringdon 1 school)	Abingdon and Faringdon	Oxfordshire County Council
Vale	Sewage pumping station	Botley	Thames Water
Vale	Grove and Wantage Railway Station	Wantage, Grove and Harwell	Network Rail/ First Great Western
Vale	Primary schools (new) to support growth (Grove 2 schools, NE Wantage 1 school)	Wantage, Grove and Harwell	Oxfordshire County Council
Vale	Secondary schools (new) to support growth (Grove 1 school)	Wantage, Grove and Harwell	Oxfordshire County Council
West	Cogges Link Road and Witney town centre enhancement, Witney	West Oxfordshire large strategic sites	Oxfordshire County Council
West	Cotswold Line redoubling	West Oxfordshire large strategic sites	Network Rail

continued

Table 2: Strategic infrastructure schemes to deliver top-priority growth schemes in the short term 2010–15

District	Infrastructure scheme	Area linked to infrastructure	Lead agency
West	Witney Downs Road A40 Junction, Witney	West Oxfordshire large strategic sites	Oxfordshire County Council
West	Primary schools (new) to support growth (Chipping Norton 1 school, Witney 1 school)	West Oxfordshire large strategic sites	Oxfordshire County Council
Total: 36 schemes			

Part 3: Place making

Place making is a holistic approach to development in a locality. We have considered by locality what development is expected to take place, the infrastructure required to deliver it, and identified the various funding streams and agencies involved. The approach is based on the idea that aligning capital investment in key locations, and linking the capital investment with housing and employment and regeneration schemes, will produce more efficient strategies that better coordinate public and private spending in a place and create a more complete place.

We have identified 12 key localities that would benefit from a place-making approach due to their future housing and employment growth:

- Abingdon and Faringdon
- Banbury
- Bicester and Upper Heyford
- Botley
- Didcot
- Oxford
- Science Vale UK
- Thame and Chinnor
- Wallingford and Cholsey
- Wantage, Grove and Harwell
- West Oxfordshire strategic sites
- Rural housing sites across Cherwell, South Oxfordshire, Vale of White Horse and West Oxfordshire.

The commentary and diagrams on the following pages show the links between infrastructure, employment, housing and regeneration by location. We hope to persuade all stakeholders to channel capital funds through our place-making agenda.

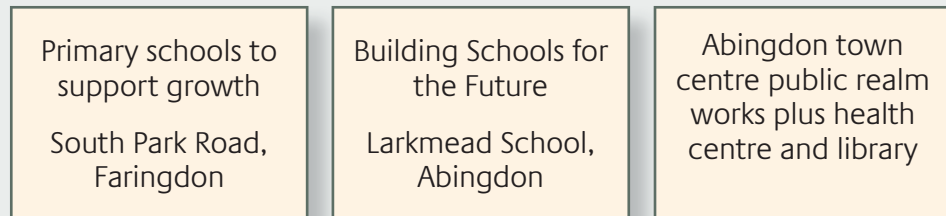
1. Abingdon and Faringdon

The area of Abingdon and Faringdon in the Vale of White Horse District could deliver 959 homes over the next five years. Growth in this area comes from six housing-led schemes. These include:

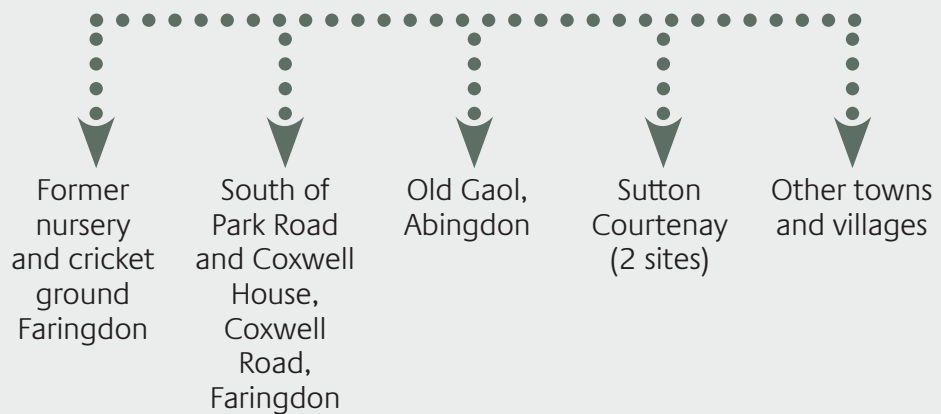
- former nursery and cricket ground, Faringdon
- South of Park Road and Coxwell House, Faringdon
- Old Gaol, Abingdon
- two sites in Sutton Courtenay, and
- yet-to-be-identified sites, mainly in Abingdon and larger villages.

Three priority strategic infrastructure projects will be required in the short term. These include the expansion of primary-school provision at South of Park Road, Faringdon and a secondary school in Larkmead, Abingdon, as part of Building Schools for the Future. Improvements to Abingdon town centre include plans for public-realm and access improvements, such as a new health centre and library.

Strategic infrastructure



Schemes



Short Term 2010–2015	332 homes	135 homes	62 homes	30 homes	400 homes
Medium Term 2015–2020	0 homes	250 homes	0 homes	0 homes	400 homes
Long Term 2020–2030	0 homes	50 homes	0 homes	0 homes	400 homes
Total	332 homes	435 homes	62 homes	30 homes	1200 homes

This is not an exhaustive list. There may be other strategic infrastructure and partners involved

2. Banbury

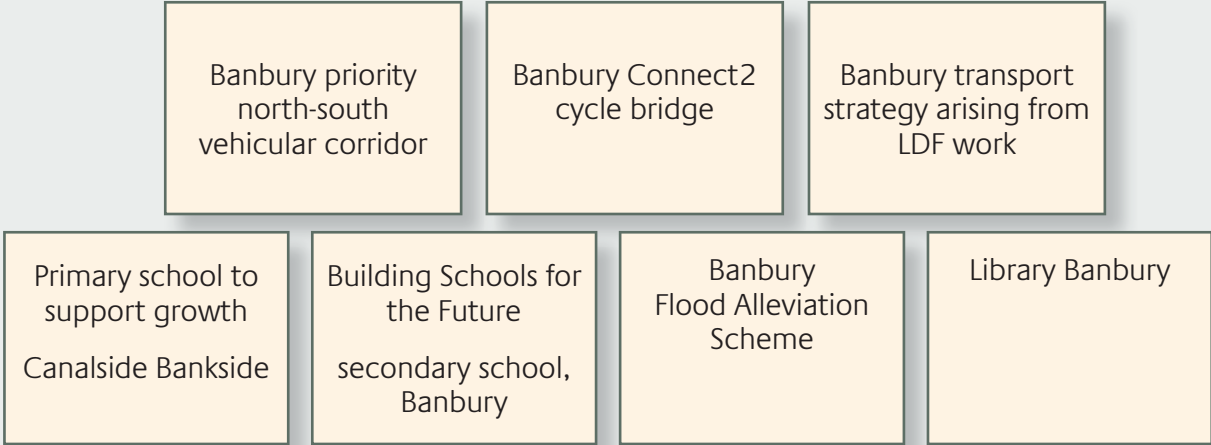
Banbury is the most northern major town in Oxfordshire and has major catchment areas in and links with other towns in Oxfordshire and across the county boundary. It also has strong links to the surrounding rural areas. Banbury has a well-defined local housing market area and economy with a distinct character. There is a focus on continued local growth and a strong emphasis on urban regeneration to tackle the cycle of deprivation and enhance the local economic and employment base.

Two priority growth schemes, the Bankside Urban Extension and the regeneration of Banbury Canalside, are deliverable in the short-term. They combine housing and regeneration-led schemes.

These schemes could deliver 2,270 new homes in the first five years. The strategic infrastructure needed to deliver them includes:

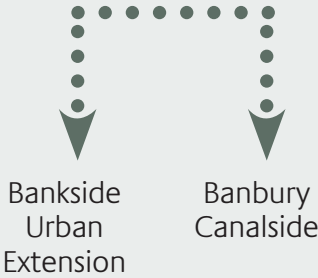
- Banbury priority north-south vehicle corridor
- Banbury Connect2 cycle bridge
- a new primary school as part of Banbury Canalside and Bankside Urban Extension
- a rebuilt/refurbished secondary school in Banbury as part of Building Schools for the Future
- a new library in Banbury, and
- the Banbury Flood Alleviation Scheme.

Strategic infrastructure



Banbury

Schemes



Short Term 2010–2015	1,070 homes	1,200 homes
Medium Term 2015–2020	400 homes	0 homes
Long Term 2020–2030	0 homes	0 homes
Total	1,470 homes	1,200 homes

This is not an exhaustive list. There may be other strategic infrastructure and partners involved

3. Bicester and Upper Heyford

Bicester is highly accessible and relatively free of environmental restrictions, making it the primary growth area in Cherwell District. The future development of Bicester is based on continued expansion around Bicester to enhance the economic health of the Central Oxfordshire sub-region, which is a 'Diamond for Investment and Growth'. Much of the future growth in this area will be in North West Bicester, which has been identified as an eco town location, with plans for a sustainable development of 5,000 homes by 2030.

Bicester is a country town identified as a main focus of housing growth in successive structure plans. An increase in economic development and more new local jobs would now help improve its self-containment and therefore its sustainability.

In the next five years, Bicester and Upper Heyford could deliver 3,825 homes through the following schemes:

- NW Bicester Eco Town
- SW Urban Extension
- Bicester Business Park
- former RAF Upper Heyford, and
- Gavray Drive.

These schemes represent a mix of employment and housing-led schemes, which aim to increase local employment, provide more housing, and reduce local commuting pressures.

The strategic infrastructure necessary to deliver these priority projects include a mix of transport, education and community facilities.

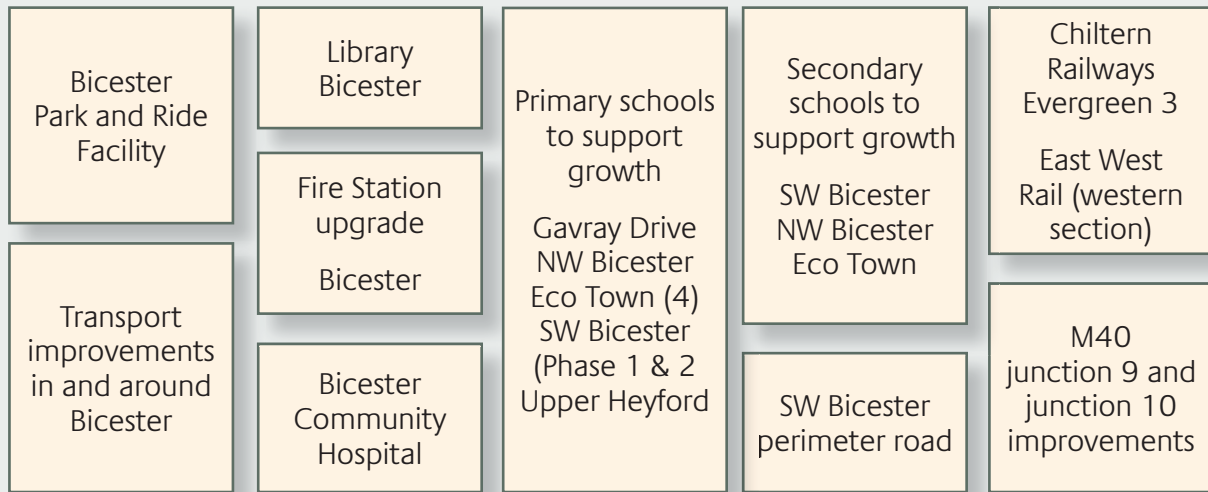
The transport infrastructure includes:

- Bicester Park and Ride
- improvements in and around Bicester including SW Bicester perimeter road
- M40 Junction 9 and Junction 10, and
- Chiltern Railways/Evergreen 3 Project (linked to East West Rail).

Additional infrastructure includes:

- new primary schools and secondary schools to support growth
- improvements to Bicester Community Hospital
- a new library, and
- an upgrade to the fire station at Bicester.

Strategic infrastructure



Bicester and Upper Heyford

Schemes



Short Term 2010–2015	1,250 homes	1,000 homes	30,000 m ²	500 homes	1,075 homes
Medium Term 2015–2020	2,000 homes	585 homes	30,000 m ²	0 homes	0 homes
Long Term 2020–2030	1,750 homes	0 homes	0 m ²	0 homes	400 homes
Total	5,000 homes	1,585 homes	60,000 m²	500 homes	1,475 homes

This is not an exhaustive list. There may be other strategic infrastructure and partners involved

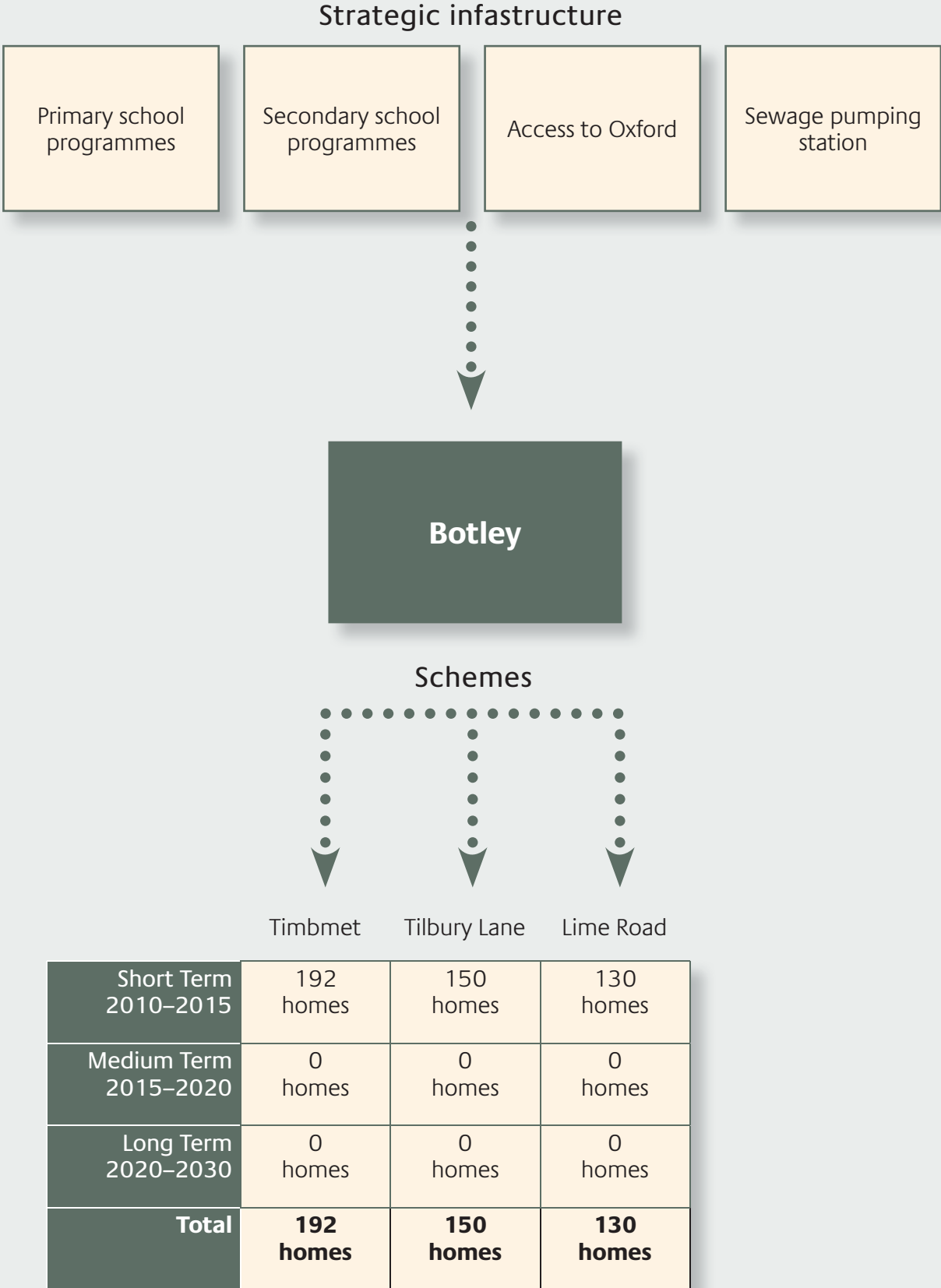
4. Botley

Botley is in the Vale of White Horse, to the west of Oxford. There are important employment, housing and infrastructure links between Botley and Oxford.

Three priority schemes have been identified in Botley. They include Lime Road, Tilbury Lane and Timbmet. Together, these housing-led schemes could deliver a total of 472 homes and 189 affordable homes in the first five years.

Currently all development in Botley is at a standstill, awaiting a sewage pumping station. Thames Water has programmed this work for 2012.

The strategic infrastructure identified to deliver these housing schemes includes primary and secondary school programmes and various transport improvements as they relate to Access to Oxford.



This is not an exhaustive list. There may be other strategic infrastructure and partners involved

5. Didcot

Didcot has been identified as a country town in several successive structure plans, and has experienced rapid growth since the 1980s. It is one of Oxfordshire's two New Growth Point areas and it will deliver a further 8,750 homes by 2026. Didcot is at the centre of Science Vale UK (SVUK), one of the UK's biggest science growth areas. The provision of affordable housing and development of a thriving town centre at Didcot is central to the planned employment growth of the science parks in SVUK. A further phase of town-centre retail and leisure development is under way.

Didcot falls across the district boundary of South Oxfordshire and Vale of White Horse and for a number of years cross-boundary collaboration has brought housing growth.

Four housing-led schemes have been identified as priorities. They could deliver 2,000 homes over the next five years. They include Great Western Park (South), Great Western Park (Vale), Ladygrove East (South), and Didcot Northern Urban Extension (South).

Essential to the delivery of new housing and employment is the strategic infrastructure needed to support these schemes.

Transport improvements include:

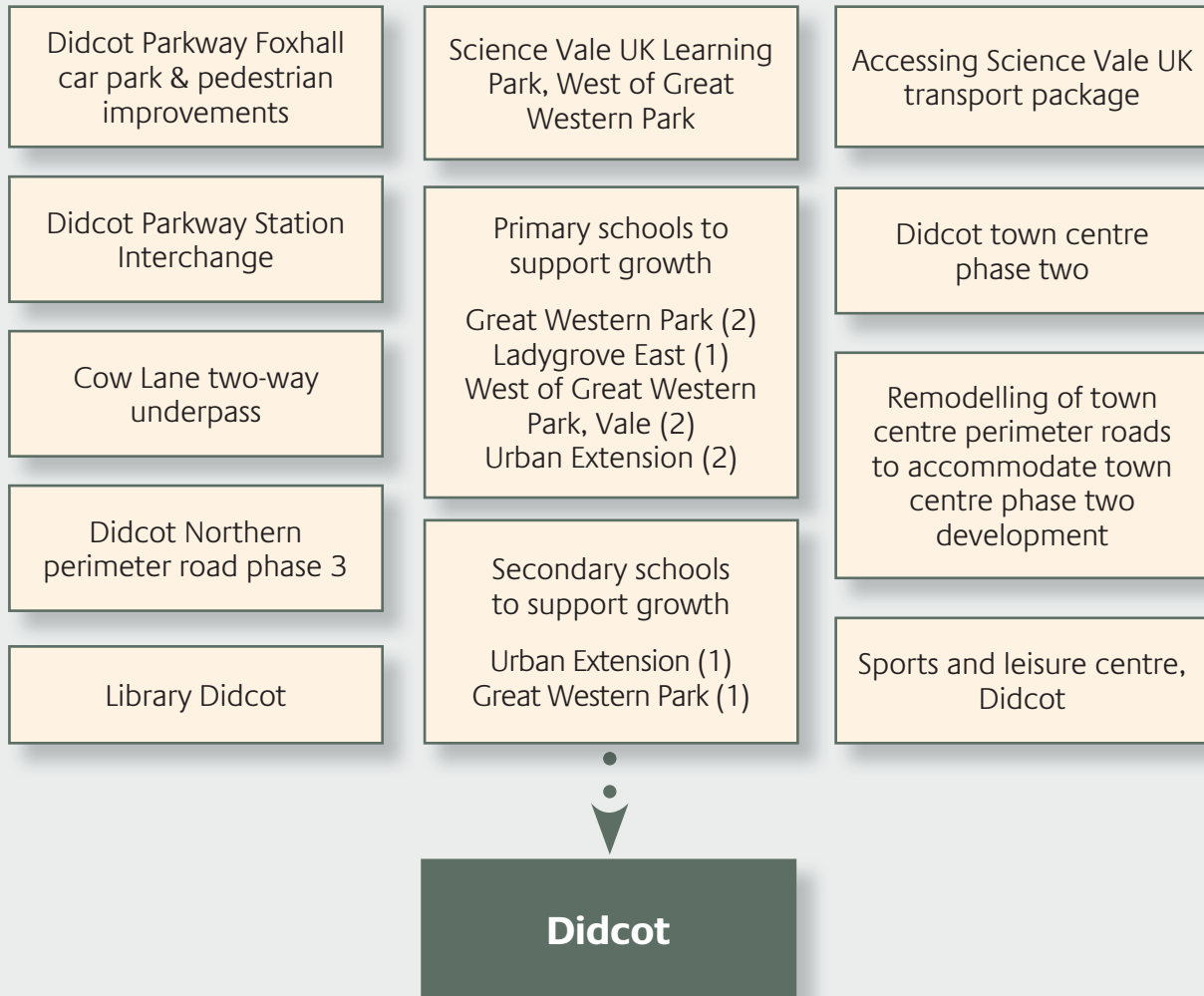
- Didcot Northern perimeter road phase 3
- a new two-way underpass at Cow Lane to link the town and the northern development areas
- remodelling of Hitchcock way and roundabout as part of the town centre phase two development
- Didcot Parkway Station Interchange, and
- Didcot Parkway Foxhall Car Park and pedestrian improvements.

Accessing Science Value UK has identified the need for several strategic road, cycle and public transport schemes in the area to support the growth to 2026. This has led to a strategic infrastructure bid to the Regional Transport Board, titled 'Accessing Science Vale UK'. The SCOT study showed that this transport package is essential to Didcot's further housing growth.

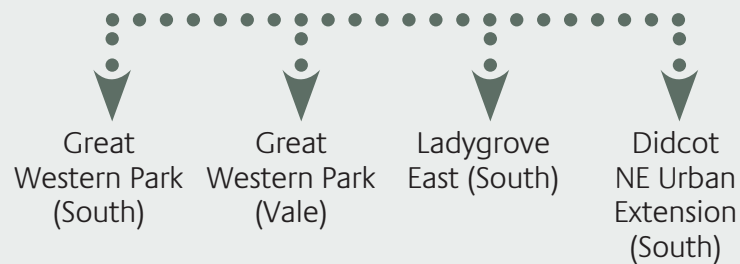
Additionally, the town needs new primary and secondary schools to support growth, as well as a new sport and leisure centre and a new library.

Plans are being developed for a science-based learning park at Didcot to service the needs of growth businesses and to meet further education demands within SVUK. Five hectares of land is reserved for the learning park to the west of Didcot within the Vale of White Horse Local Development Framework Core Strategy.

Strategic infrastructure



Schemes



Short Term 2010–2015	700 homes	600 homes	300 homes	400 homes
Medium Term 2015–2020	1,250 homes	0 homes	342 homes	1,000 homes
Long Term 2020–2030	750 homes	0 homes	0 homes	400 homes
Total	2,700 homes	600 homes	642 homes	1,800 homes

This is not an exhaustive list. There may be other strategic infrastructure and partners involved

6. Oxford

Oxford is the city at the heart of the Central Oxfordshire sub-region, and is one of two New Growth Points (NGPs) identified in Oxfordshire. Oxford and Central Oxfordshire sub-region has been identified as one of eight 'Diamonds for Investment and Growth'. As one of 21 regional hubs across the South East region, Oxford is a centre of economic activity and transport services, serving the needs of the wider region. These designations highlight Oxford's strategic importance in the delivery of housing, employment and regeneration.

Eight priority short-term deliverable growth schemes have been identified in Oxford. These include four housing-led schemes, one employment-led scheme and three regeneration schemes.

In the short term (by 2015), Oxford could deliver 4,810 homes, of which 2,167 would be affordable. This includes housing schemes at:

- Barton
- Blackbird and Greater Leys
- Oxford West End
- small and medium housing sites throughout Oxford, and
- the new council-house building programme.

Oxford West End Renaissance and the Northern Gateway site (subject to the outcome of the Oxford Core Strategy) could provide significant floor space and job opportunities, which will improve the county economy.

Oxford's adopted Regeneration Framework sets out an action plan covering the physical, social and economic activities needed for regeneration, and seeks to break the cycle of deprivation. There are regeneration schemes to address five areas in Oxford: Barton, Blackbird Leys, Oxford West End, Rose Hill and Wood Farm. In addition, various aim to tackle homelessness.

Eight pieces of strategic infrastructure have been identified to deliver the priority housing, employment and regeneration schemes. In transport, these are:

- Access to Oxford
- Chiltern Railway/Evergreen 3 proposal (which will deliver the first part of East West Rail), and
- Thornhill Park and Ride.

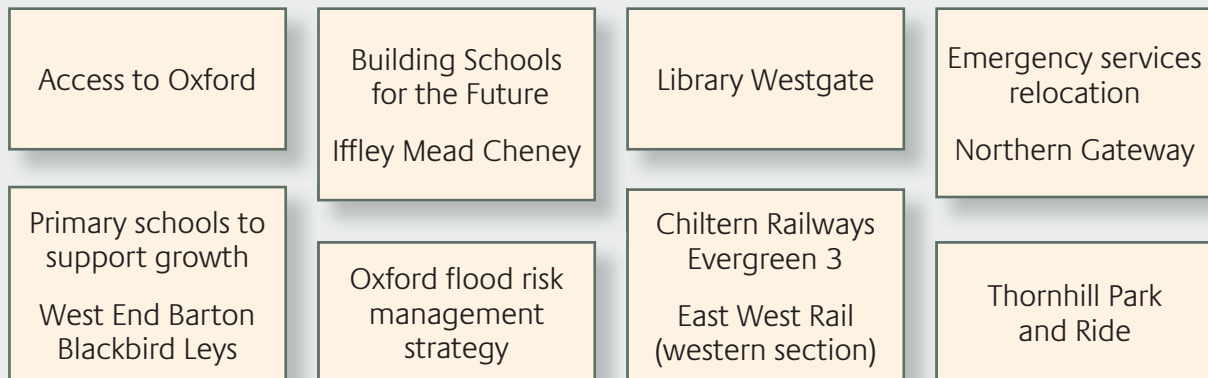
Educational infrastructure includes:

- new primary schools at Barton, Blackbird Leys and the West End
- improvements to the secondary schools at Iffley Mead and Cheney as part of the Building Schools for the Future programme. The Oxford School may also enter the academies programme during this time frame.

The other main infrastructure projects are:

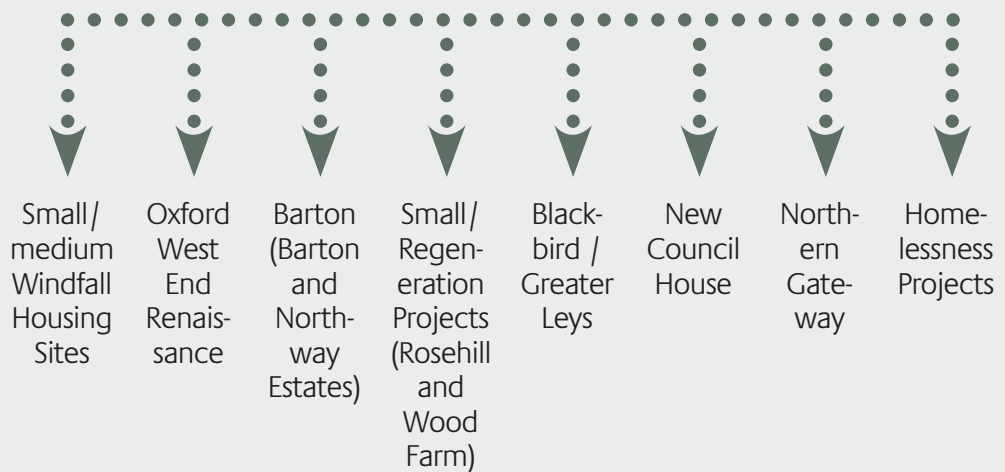
- the Oxford Flood Alleviation Scheme
- the relocation of emergency services to the Northern Gateway site, and
- the refurbishment of the Westgate library.

Strategic infrastructure



Oxford

Schemes



Short Term 2010–2015	2,722 homes	830 homes	500 homes	n/a	500 homes	58 homes	200 homes	n/a
Medium Term 2015–2020	1,151 homes	35,000 m ²	500 homes	n/a	0 homes	0 homes	20,000 m ²	n/a
Long Term 2020–2030	1,900 homes	0 homes	0 homes	n/a	0 homes	0 homes	35,000 m ²	n/a
Total	5,773 homes	830 homes 35,000 m²	1,000 homes	n/a	500 homes	58 homes	200 homes 55,000 m²	n/a

This is not an exhaustive list. There may be other strategic infrastructure and partners involved

7. Science Vale UK

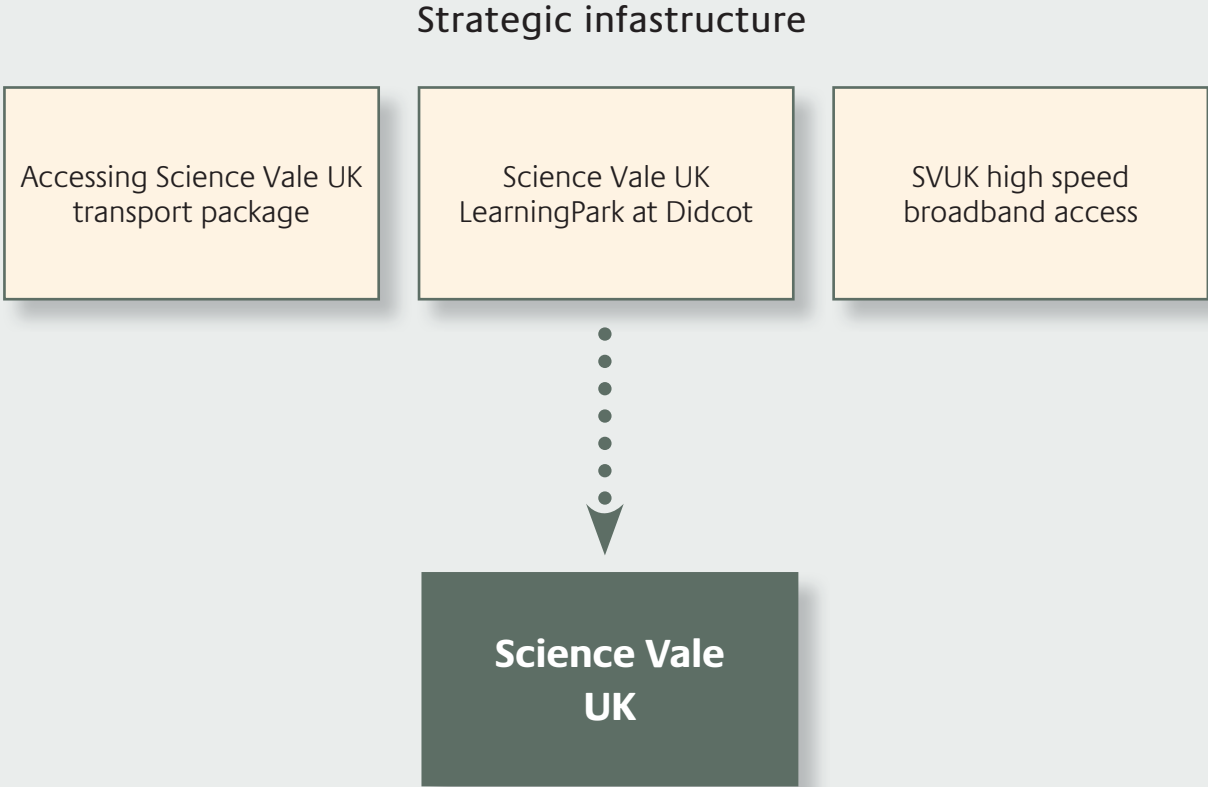
Science Vale UK (SVUK) sits in the Oxford and Central Oxfordshire 'Diamond for Investment and Growth'. It includes the areas of Didcot, Wantage and Grove, Harwell Science and Innovation Campus (HSIC), Culham Science Centre, and Milton Park. Didcot and the Wantage, Grove and Harwell conurbation are covered elsewhere as separate place-making localities.

SVUK is an area of economic growth focused around enterprise and innovation. It includes a significant proportion of the region's scientific research and development and high technology businesses.

Harwell SIC has just under 70 ha of land earmarked for mixed-use development, including science and innovation, business, and residential uses. A further 24 ha of land could be used for business development in the period to 2020. An additional 100 ha has been earmarked for a mix of science, business and residential development from 2020. Milton Park is one of the largest business parks in Europe and is a cluster of knowledge-based businesses. It covers 77 ha of land and has 340,000 m² of floor space, employing more than 6,300 people.

Each of the areas which form SVUK has specific infrastructure needs, but the overarching infrastructure requirements for the whole of the SVUK area is the Accessing Science Value UK package, which includes a new railway station to serve Wantage and Grove.

Further plans include the roll-out of high-speed broadband across SVUK and the creation of an innovation learning park, which will address the learning and development needs of employees in all sorts of businesses as well as meeting the increasing demands for further education across SVUK.



Schemes



Science Vale
UK

Short Term 2010–2015	70 ha
Medium Term 2015–2020	24 ha
Long Term 2020–2030	100 ha
Total	194 ha

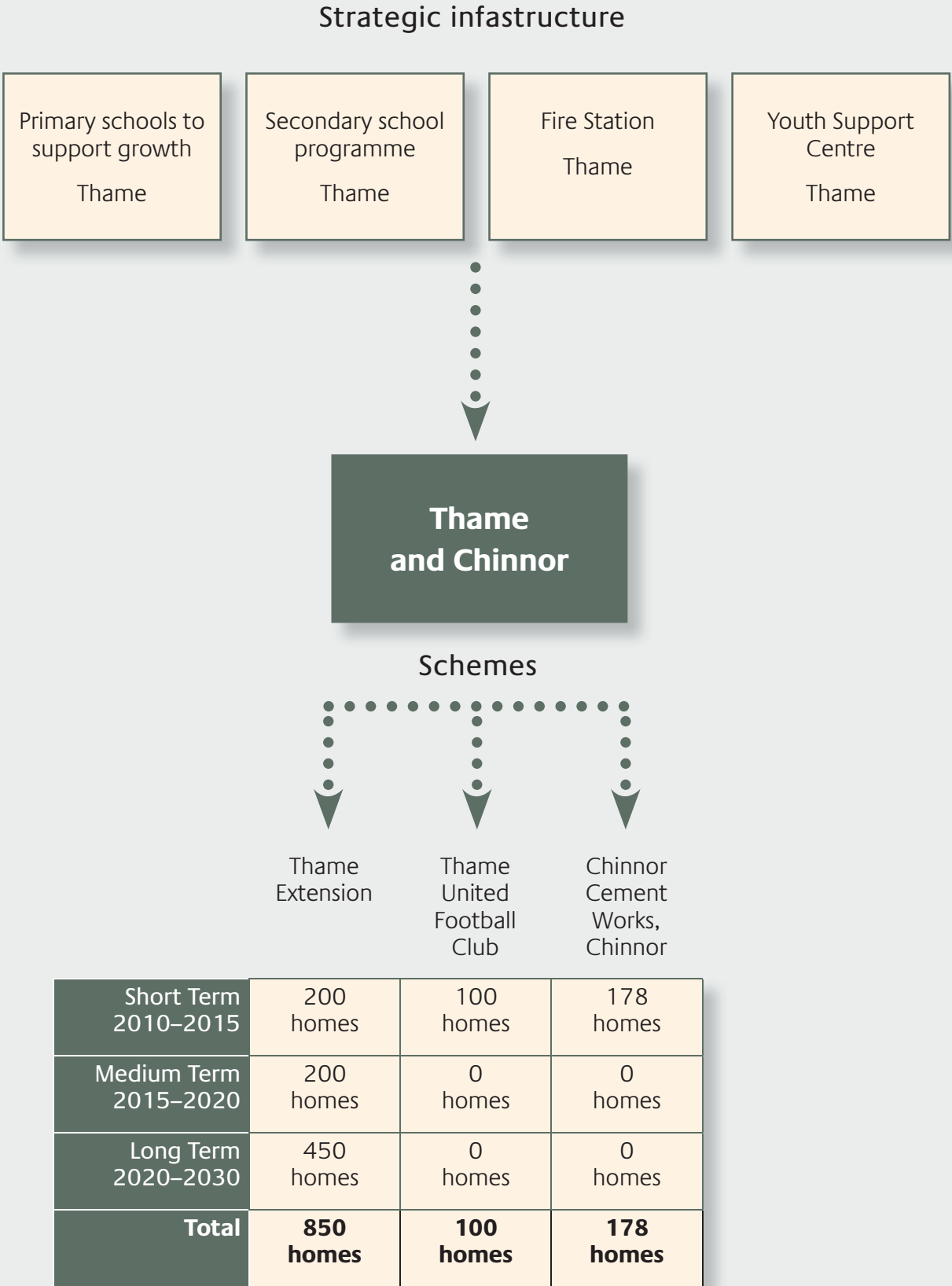
This is not an exhaustive list. There may be other strategic infrastructure and partners involved

8. Thame and Chinnor

The Thame and Chinnor area could provide 478 homes in the next five years, and a total of 1,128 homes by 2030. This expansion would come from three housing-led schemes; the extension to Thame; the redevelopment of Thame United Football Club; and Chinnor Cement Works.

Four strategic pieces of infrastructure have been identified to ensure a rounded development within the larger area. These are (all in Thame):

- a new primary school
- a youth support centre
- secondary education provision, and
- a new fire station.



This is not an exhaustive list. There may be other strategic infrastructure and partners involved

9. Wallingford and Cholsey

The area comprising Wallingford and Cholsey in South Oxfordshire could deliver a total of 603 new homes in the next five years and a total of 1,103 homes by 2030. Two priority housing schemes have been identified: Fair Mile Hospital and an extension to Wallingford.

Strategic pieces of infrastructure to support these housing-led schemes are new primary school and secondary school improvements, and a new fire station at Wallingford.

Strategic infrastructure



Wallingford and Cholsey

Schemes



Thame Extension

Thame United Football Club

Short Term 2010–2015	353 homes	250 homes
Medium Term 2015–2020	0 homes	250 homes
Long Term 2020–2030	0 homes	250 homes
Total	353 homes	750 homes

This is not an exhaustive list. There may be other strategic infrastructure and partners involved

10. Wantage, Grove and Harwell

The towns of Wantage, Grove and Harwell form the western boundary for Science Vale UK and both will be receiving major housing. The Local Plan already allocates Grove Airfield for 2,500 homes and the emerging Core Strategy is proposing to allocate a further 1,500 homes north-east of Wantage.

Major pieces of infrastructure include the Northern Link Road at Grove and the Wantage Eastern Link Road. Also included are a new secondary school, two or three primary schools, a new library, contributions to the Accessing Science Value UK package and improvements/replacement of Wantage Leisure Centre.

The area around the Harwell Campus could take an additional 550 homes in the next five years, and a total of 675 by 2020. This is made up of Chilton Fields, which has recently been granted planning permission; and the land north of the Campus, which is being proposed as a strategic site as part of the emerging Core Strategy.

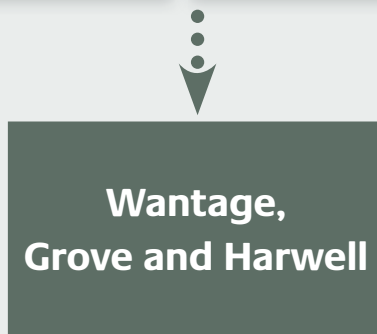
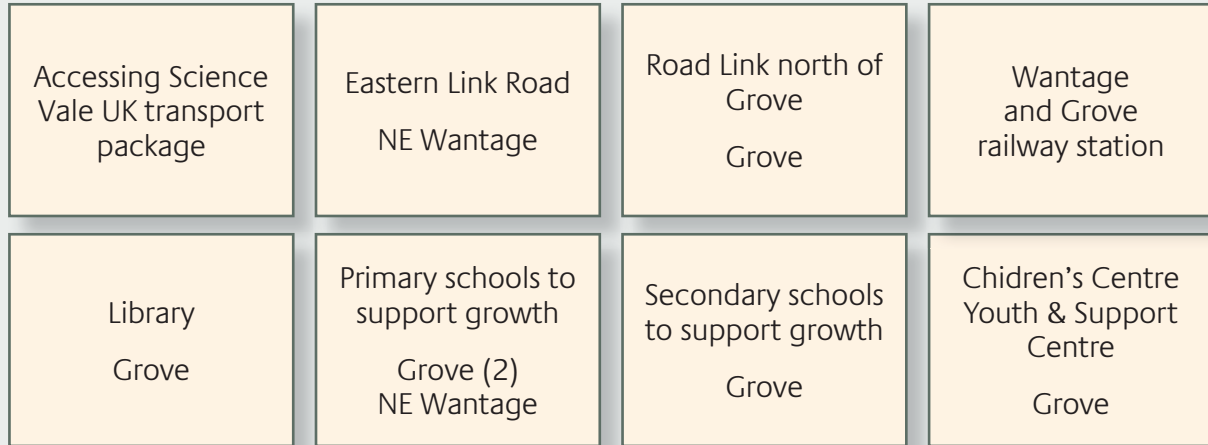
Taken together, the Wantage, Grove and Harwell area could deliver a total of 1,401 new homes in the next five years.

The strategic infrastructure to deliver these schemes includes the Accessing Science Value UK package. This covers road, rail, public transport and cycle schemes across the Wantage/Grove, Harwell and Didcot area.

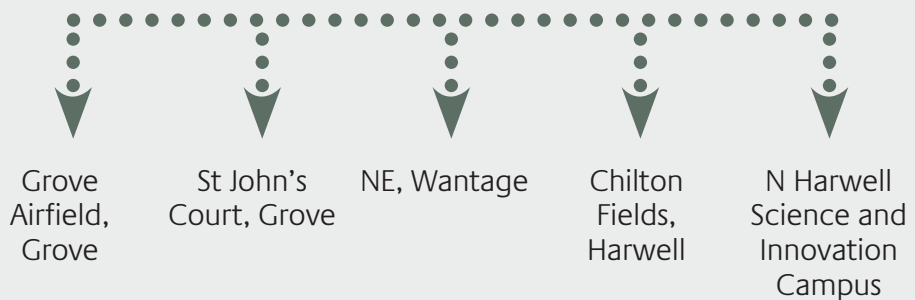
Other infrastructure needs are:

- the improvement/replacement of Wantage Leisure Centre
- a new library at Grove, and
- new primary schools and secondary schools.

Strategic infrastructure



Schemes



Short Term 2010–2015	650 homes	11 homes	190 homes	275 homes	275 homes
Medium Term 2015–2020	1,250 homes	0 homes	600 homes	0 homes	125 homes
Long Term 2020–2030	600 homes	0 homes	710 homes	0 homes	0 homes
Total	2,500 homes	11 homes	1,500 homes	275 homes	400 homes

This is not an exhaustive list. There may be other strategic infrastructure and partners involved

11. West Oxfordshire strategic sites

Significant growth is expected in the towns of Carterton, Chipping Norton, and Witney. Additionally, there are considerable development pressures and housing needs, particularly for rural housing and the elderly. Much of the planned future investment aims to improve and expand the existing infrastructure in towns as well as villages.

Witney, the largest town in West Oxfordshire, has expanded considerably over the last 20 years. Carterton, the next largest town, is also undergoing major expansion related to the redevelopment of the air transport base.

Five housing-led priority growth schemes have been identified in West Oxfordshire. Together, these schemes could deliver 1,400 homes in the first five years. The schemes include:

- Chipping Norton
- Northern Carterton
- West Witney/North Curbridge SDA
- Carterton Expansion, and
- various market-town schemes.

Seven pieces of strategic infrastructure have been identified to help deliver these housing schemes. The transport infrastructure includes:

- Cogges Link Road and Witney town-centre enhancement
- Witney Downs Road A40 Junction, and
- the Cotswold railway line redoubling.

Also identified are:

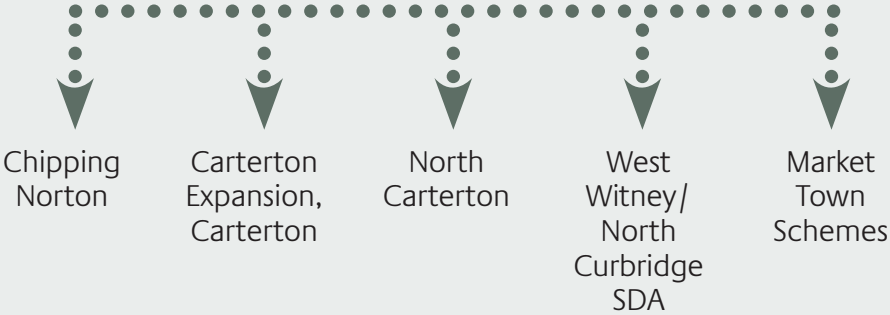
- a new primary school at Chipping Norton
- a new primary and secondary school at North Curbridge ,and
- community hospitals in Chipping Norton and Witney.

Strategic infrastructure



West Oxfordshire strategic sites

Schemes



Short Term 2010–2015	200 homes	200 homes	200 homes	300 homes	500 homes
Medium Term 2015–2020	0 homes	400 homes	0 homes	700 homes	500 homes
Long Term 2020–2030	0 homes	400 homes	0 homes	0 homes	1,000 homes
Total	200 homes	1,000 homes	200 homes	1,000 homes	2,000 homes

This is not an exhaustive list. There may be other strategic infrastructure and partners involved

12. Rural housing

Almost half (49 per cent) the population of Oxfordshire live in rural settlements, making Oxfordshire the most rural county in the South East region. The Oxfordshire Rural Housing Strategy (RHS) recognises 450 rural settlements in Oxfordshire, which accounts for about 19 per cent of the rural settlements in the region.

While house prices vary significantly across Oxfordshire, there is strong evidence of high prices in many rural parishes, and affordability is a key concern. The supply of affordable housing in rural areas is limited because not many properties are coming onto the market. As a result, there is a lack of accommodation for newly forming households wishing to live in rural settlements, and many young people are leaving rural areas.

Many small villages are becoming exclusive communities of retired people and wealthy commuters. The loss of services, schools and shops in rural areas contributes to longer commute times and places a toll on the local economy. For this reason Oxfordshire County Council's primary Strategy for Change reaffirms its commitment to keeping local schools. There are no proposals for the closure of rural primary schools.

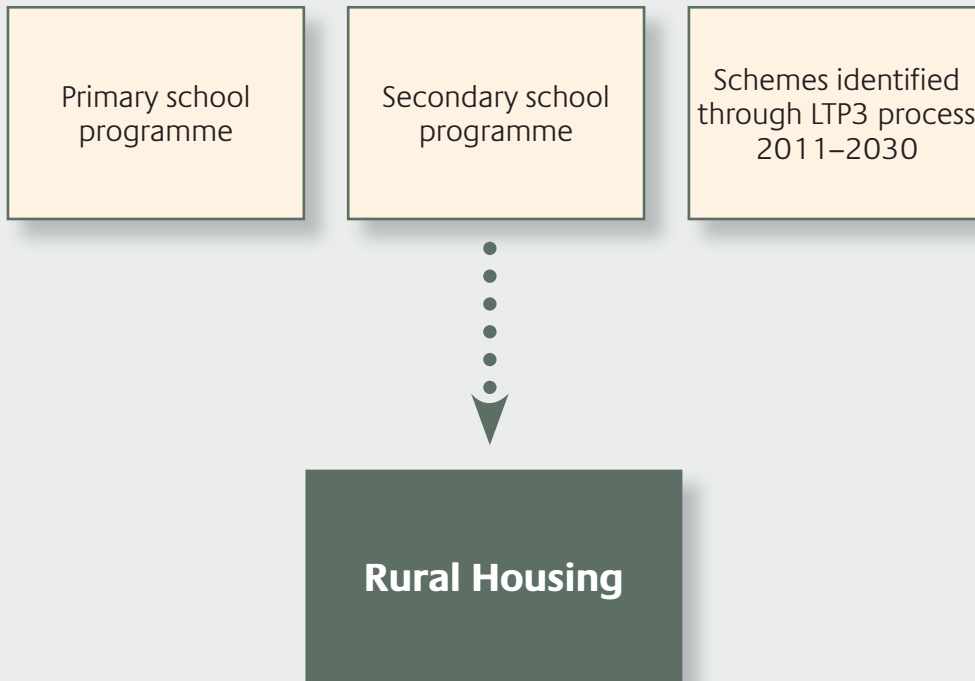
The RHS aims to promote sustainable communities in the rural areas of Oxfordshire; prevent the decline of local services; and enhance community life. It recognises the importance of market towns in delivering sustainable, thriving local communities.

The population of Oxfordshire is getting older, and the proportion of people aged 65 or older is expected to grow. This growth is substantial in the rural districts and will have implications for the type of housing and services that will be needed. It will be important to provide appropriate housing and support for the elderly in rural areas, to enable them to remain independent or live in homely environments in the community for as long as possible.

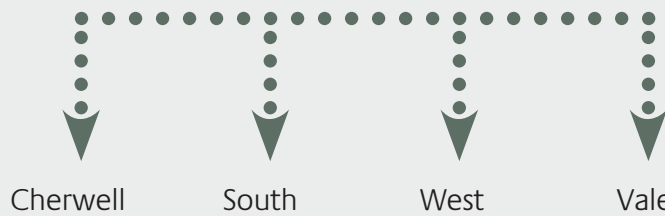
Cherwell, South Oxfordshire, Vale of White Horse and West Oxfordshire have identified rural housing schemes. Taken together, the schemes in these four districts are expected to deliver 1,498 homes within the next five years.

Because these schemes are not site specific, it is difficult to identify the specific strategic infrastructure they will need. In general, they will use existing transport and education infrastructure, but the plans will be re-examined as the development programme progresses and the Local Development Frameworks are finalised.

Strategic infrastructure



Schemes



	Cherwell	South	West	Vale
Short Term 2010–2015	275 homes	120 homes	603 homes	500 homes
Medium Term 2015–2020	80 homes	100 homes	400 homes	100 homes
Long Term 2020–2030	160 homes	200 homes	800 homes	200 homes
Total	515 homes	420 homes	1,803 homes	800 homes

Numbers do not include windfalls on unidentified sites

This is not an exhaustive list. There may be other strategic infrastructure and partners involved

Part 4: Next steps

Delivering the LIP

Local Investment Agreement (LIA)

The Local Investment Agreement (LIA) flows from the LIP and is a non-legally binding Memorandum of Understanding between the local authorities and the HCA about the investments and resources that they will provide. The LIA seeks to give certainty to all parties in preparing schemes and interventions. The LIA will also complete the analysis of the different funding streams available.

The LIA will be prepared by SPIP, but by its nature it also needs to be formally agreed by each local authority. The LIA should be completed by the end of June 2010.

The SPIP will consider using a similar format for agreements with other funding and delivery partners to ensure they formally commit to investing in Oxfordshire.

Monitoring

The success of any plan is proved by monitoring its impact. Monitoring, in turn, leads to assessing when and to what degree the plan needs to be reviewed. Each local authority is already responsible for monitoring issues relating to house building, the number of new affordable homes, and employment floor space, through the annual monitoring report, which relates to the Local Development Framework. SPIP will use this information, as well as other context, to assess the LIP's success as part of this established cycle.

Reviewing

The LIP is an evolving document, and the SPIP will be able to review and if necessary

update it to reflect changing circumstances. At the same time, it needs to have a long enough 'shelf life' so that key partners can rely on it to inform their investment decisions. We expect to review, and if necessary update, the LIP every 18 months.

Informing Oxfordshire programmes

The LIP will be used to inform work in the following areas.

Local Development Frameworks

Each district is responsible for producing a portfolio of documents to guide its future spatial planning, known collectively as the Local Development Framework (LDF). The LIP sets out a shared vision and identifies strategic objectives for Oxfordshire, which the five LDFs will help deliver.

LTP3

The third Local Transport Plan (LTP3) for Oxfordshire is currently being developed. Unlike the previous two documents, which had to be short-term bidding documents for regional transport funding, LTP3 takes a long-term view to 2030. LTP3 will seek to quantify the investment required for the highway and transport infrastructure that will support the planned growth; and will bid for public funding.

The key issue in the emerging LTP3 is the need to secure transport investment, which will enable development to go ahead, support the growth and competitiveness of the local economy, and make it easier to get around the county, while reducing the impact of transport on the environment, tackling climate change, and promoting

healthy, safe and sustainable travel.

The LIP will support SPIP in informing and testing LTP3 as it progresses through crucial consultation stages.

Community Infrastructure Levy

The LIP will be vital in informing SPIP members' individual and collective thinking on the transition from Section 106 agreements to the new Community Infrastructure Levy (CIL).

SPIP has agreed to use the Local Investment Plan (LIP) and Local Investment Agreement (LIA) as a basis for advising the local planning authorities on development-related infrastructure needed by local government (particularly County Council) services; and by other providers. This advice will help local planning authorities decide on infrastructure planning in their LDFs and on whether to introduce CIL or other ways of getting contributions from developments.

Oxfordshire Economic Strategy

The LIP will be an important document in informing and testing the future Oxfordshire Economic Strategy, which SPIP is also responsible for. This LIP has been prepared in parallel with the County Council's Oxfordshire Economic Assessment (EA). The LIP and the EA will inform the issues that need to be addressed in the Economic Strategy.

South East Regional Strategy

The LIP will inform the production of the South East Regional Strategy by the South East England Partnership Board (SEEPB). The new document will replace the adopted South East Plan (Regional Spatial Strategy) and the Regional Economic Strategy, and will cover the period to 2031. This LIP, with its agreed shared visions, strategic objectives, and housing, employment and

regeneration schemes, will seek to inform the direction and content of this South East Regional Strategy as far as it relates to Oxfordshire.

Total Place/Total Capital

Total Place looks at how a 'whole-area' approach to public services and investments can lead to better outcomes. It seeks to identify and avoid overlap and duplication between organisations, so improving local services and efficiency. Through the LIP, we have started to apply our place-making approach to 12 locations across Oxfordshire. This could develop into a formal 'Total Place/Total Capital' approach, which could help deliver housing, employment, and regeneration schemes throughout the county.

Formal adoption

The local authorities and the Homes and Communities Agency (HCA) formally sign up to the contents of this Local Investment Plan as part of the ‘Single Conversation’, and in advance of the Local Investment Agreement, which will be signed and sealed with the HCA in due course.

We are clear that the success of this LIP depends on the actions of ourselves and all our partners, and that we will seek to work together to achieve the growth we have outlined here.

On behalf of our individual organisations, working together within the Oxfordshire Strategic Planning and Infrastructure Partnership, we formally adopt this document.

Councillor Barry Wood

Leader, Cherwell District Council

Councillor Bob Price

Leader, Oxford City Council

Councillor Ian Hudspeth

Portfolio Holder for Growth and Infrastructure, Oxfordshire County Council

Councillor Ann Ducker

Leader, South Oxfordshire District Council

Councillor Tony de Vere

Leader, Vale of White Horse District Council

Councillor Barry Norton

Leader, West Oxfordshire District Council

David Edwards

Homes and Communities Agency

The LIP will be held by SPIP and the HCA. The HCA will formally seal this document. It will be publicly accessible through the local authorities’ and HCA websites.

Date: 31 March 2010

Division(s):

CABINET– 22 JUNE 2010

SPECIALIST HEALTH SERVICES FOR PEOPLE WITH LEARNING DISABILITIES CONTRACT AWARD

Report by Director of Social & Community Services

Introduction

1. Oxfordshire Social & Community Services and NHS Oxfordshire currently purchase services for adults with learning disabilities through a pooled budget with the Council as lead commissioner. As part of this responsibility, the Council contracts with Ridgeway NHS Partnership Trust for the provision of specialist health services for adults with learning disabilities in Oxfordshire as part of an integrated health and social care Learning Disability Service, including both community health support and inpatient services. The current contract runs until December 2010.

Exempt Information

2. This report contains information in Annexes 1 & 2 that relates to the competitive procurement process and is commercially sensitive. The public should therefore be excluded if cabinet wishes to consider Annex 1 further as their discussion in public would be likely to lead to the disclosure of information in the following categories prescribed by Part 1 of Schedule 12A to the Local Government Act 1972 (as amended): paragraph 3 – information relating to the financial or business affairs of any particular person (including the authority holding that information) – and since it is considered that, in all circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information, in that disclosure would distort the proper process of the transaction and the Council's standing generally in relation to such transactions in future, to the detriment of the Council's ability properly to discharge its fiduciary and other duties as a public authority.

Procurement Activity Undertaken

3. In line with the Council's Contract Procurement Rules, the business opportunity to provide Learning Disability Specialist Health Services was internationally advertised (via OJEU) as part of restricted procurement process in September 2009. The specification was for a whole system solution across community and inpatient services, ensuring that people are supported close to home and the provision of flexible support to facilitate swift discharge following admission.
4. The contract opportunity on offer was for 5 years with the option to extend for a further 2 years. This is a high value business opportunity with an indicative value over 5+2 years of £42 million.

5. Following advertisement and some initial interest, only three providers returned pre-qualification questionnaires (PQQs) for inclusion in the procurement, including the incumbent provider – Ridgeway Partnership.
6. PQQs were evaluated by a joint panel, including representation from NHS Oxfordshire and the LD Commissioning & Contracting Team (C&C Team), supported by the Council's Procurement Team. Following evaluation of the PQQ it was clear that submissions from two providers failed to meet basic criteria; achieving considerably lower overall scores, failing the Health & Safety section (gaining less than the clearly advertised pass-mark of 60%) and not demonstrating any resource or plan as to how they would deliver inpatient facilities within Oxfordshire. This outcome left the Council in the position where only one viable service provider was able to deliver the required service.
7. This situation has been discussed with the NHS Oxfordshire representatives, Legal Services and the County Procurement Team. In order to test robustness of the evaluation, PQQs from the two failing providers were further scrutinised but still failed to meet the required standard. Of further note, consideration was given to the potential conflicts of interest in decision making in light of long term and close working relationships between the Council and the incumbent provider. These issues were raised at an early stage and an agreed action plan and declarations of interest put in place.
8. It was agreed that the process had been fair and non-discriminatory and would withstand challenge.
9. The outcome of the PQQ stage put the Council in an unusual position with regard to continued procurement, there are no written guidelines for future action.
10. Extensive consideration has been given to the range of options. Taking into account the views of the NHS Oxfordshire, Legal Services, the County Procurement Team and the C&C Team approval was given to pursue negotiations with Ridgeway Partnership.

Negotiations

11. Ridgeway Partnership were asked to provide a detailed proposal for how they would deliver the service and make the required efficiency savings. They also provided an accessible version which was evaluated by a panel of service user representatives who also interviewed selected Ridgeway Partnership staff.
12. The proposal was evaluated by a panel made up of representatives of NHS Oxfordshire, LD Contracting & Commissioning Team, County Procurement Team and Assistant Head of Service (Learning Disabilities). A series of negotiation meetings to examine this proposal were held with the following results:-

- Ridgeway Partnership have accepted the service specification that was sent out as part of the tender process.
- Ridgeway have revised their proposal to incorporate all queries and clarifications from the panel. This document will form part of their contract

Financial and Staff Implications

13. Ridgeway Partnership and Oxfordshire County Council have agreed an efficiency saving plan which will deliver £500,000 of savings over the lifetime of the contract.
14. Negotiations have ensured that any future efficiency savings imposed by NHS Oxfordshire will not be included in the £500,000 mentioned above and further negotiations would be required between the commissioners and provider to agree the service changes that would be required to deliver these.
15. The proposed contract contains a clause which enables the County Council to break the contract if there are any changes to the pooled budget arrangements currently in place between it and NHS Oxfordshire resulting in a cessation or reduction in funding from NHS Oxfordshire.

Conclusion

16. Following constructive negotiations and positive feedback from service user representatives an agreement has been made with Ridgeway Partnership to recommend that Oxfordshire County Council enters into a contract with them.

RECOMMENDATION

17. **The Cabinet is RECOMMENDED to approve the signing of a contract with Ridgeway Partnership to provide specialist health services for people with Learning Disabilities**

JOHN JACKSON
Director for Social & Community Services

Background papers: Nil

Contact Officer: Adam Marshal Tel: 01865 323635

June 2010

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By virtue of paragraph(s) 3 of Part 1 of Schedule 12A
of the Local Government Act 1972.

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of the Local Government Act 1972.

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Division(s): All

CABINET – 22 JUNE 2010

EXEMPTION REQUEST FROM THE COUNCILS CONTRACT PROCEDURE RULES FOR 16-19 EDUCATION CONTRACTS FOR 2010/11

Report by Director for Children, Young People & Families

Introduction

1. Following the enactment of the Apprenticeships, Skills, Children and Learning Act 2009 (ASCL Act) and the subsequent dissolution of the Learning and Skills Council (LSC) on 31 March 2010, one of the new statutory responsibilities for Oxfordshire County Council is the transfer of financial and contractual responsibilities from the LSC for 16-19 education funding (except for apprenticeships which is the responsibility of the newly formed Skills Funding Agency).
2. The Young People's Learning Agency (YPLA) was launched in April 2010 with a responsibility for supporting local authorities to commission suitable education and training opportunities for all 16-19 year olds.

Exemption Information

Introduction to the Request

3. LSC contracts run from 1st August to 31st July, aligning with the academic year, and the existing contracts for the period April 2010 to July 2010 have been novated to the Council under a nationally laid down statutory transfer scheme.
4. For the 2010/11 academic year i.e. for contracts running from August 2010 to July 2011 (AY 2010/11), the LSC determined the allocation of funding prior to the transfer of responsibilities and providers have been notified of this allocation.
5. The Council is now the lead commissioner for 8 further education providers and will be contracting directly with these providers for 16-19 education provision in AY 2010/11. One of these providers is the Council itself which has a small contract to deliver 16-19 education (100 places) which will be covered by a service level agreement and is therefore not part of this exemption request.
6. The 7 remaining providers with their AY 2010/11 16-19 funding allocation values are listed in the table below:

Provider	Provider Type	2010/11 Learner Number Target	2010/11 Contact Value
Abingdon & Witney College	College	2,038	£10,584,760
Oxfordshire Ethnic Minority Business Services	Independent Training Provider	60	£15,422
Oxford Brookes University	HE Institution	92	£497,799
Oxford & Cherwell Valley College	College	3,160	£15,983,582
The Henley College	College	1,971	£9,582,450
Languages Training & Development	Independent Training Provider	122	£388,861
Swan Lake	Independent Training Provider	60	£188,848

7. The total value of these contracts for 2010/11 is: £37,241,722 with an associated overall target of 7,503 16-19 year olds participating in 16-19 education.

Reason for requesting exemption from Contract Procedure Rules

8. This is the transitional commissioning cycle during which local authorities became responsible for delivering the plans and allocations made by the LSC up to 31 March 2010 for delivery in the academic year August 2010 to July 2011.
9. The AY 2010/11 allocations for 16-19 education provision were negotiated and finalised by the LSC prior to the transfer of responsibilities to the LA. Therefore, although the contracts will be with the Council, the Council was not responsible for nor party to the procurement of this provision.
10. The Council will be bound by grant conditions issued by the YPLA that will specify the individual allocations to providers.
11. As a consequence of the constraints of the funding allocations, the Council is unable to procure these services through a normal procurement route as it is prevented from seeking competitive quotes. A request for exemption from CPR Rule 13.3 is therefore being submitted under CPR Rule 4.

Consequences if the proposed action is not approved

12. If approval is not given the Council will not be able to enter into the contracts. This would mean that the Council would be in breach of the grant conditions of the YPLA.

13. If the Council does not sign up to the YPLA grant conditions it will not receive the funding and therefore will be unable to fulfil its statutory responsibilities to provide 16-19 education.

Legal, Financial and Procurement Implications

Legal Appraisal

14. Set out in the Annex to this report.

Financial Appraisal

15. The funding allocations to be passed on to FE colleges will be determined by and fully funded by YLPA. The 2010/11 academic year contracts can clarify that the only resources to be passed to the colleges will be those provided by YPLA. Furthermore, Government confirmed in a speech by the Chief Secretary to the Treasury on 24th May 10, that budgets for 16-19 Education in 2010/11 would be protected and therefore there should be no risk of reduction in funding to these contracts. Accordingly no ongoing revenue costs can arise.
16. Not entering into the contracts originally procured by YPLA is likely to give rise to substantial revenue costs potentially including damages claims by the colleges.

Procurement Appraisal

17. It should be noted that this may bring this council into conflict with EU Procurement Legislation and as a result is a risk to the council. Unfortunately, though, the actions and lack of information coming from the LSC in the lead up to the transfer has effectively left the council in a position where it is contractually obliged with no evidence that the legislation has been adhered to prior to the obligations being made.
18. It should also be noted that all other local authorities in England will be in the same situation.

RECOMMENDATION

19. **The Cabinet is RECOMMENDED to approve exemption from the Council's Contract Procedure Rules (under rule 5.4.2) for the 2010/11 academic year.**

MEERA SPILLETT
Director for Children, Young People & Families

Contact Officer: Sarah Cullimore, 16-19 Education Service Manager
Tel: (01865) 328089
Name of Instructing Officer: Sandra Higgs
Tel: (01865) 328546

Background paper: Nil
May 2010

Children Young People & Families Directorate

Request for exemption from tendering under Contract Procedure Rule (“CPR”) 4 in respect of 16-19 Education Contracts for 2010/11

Legal Appraisal by County Solicitor

A. Background

1. The Children Young People and Families Directorate (“CYP&F”) is seeking exemption under CPR 4 from the tendering requirements under CPRs 12-18 in relation to the letting of seven contracts (“the Contracts”) for the provision of education to 16-19 year olds for the academic year 2010/11.
2. Details of the providers and annual values of the Contracts are shown in the report to which this legal appraisal is attached. In summary:
 - 3 contracts are with colleges (total annual value £36.15m);
 - one contract is with an HE Institution (annual value £498,000); and
 - 3 contracts are with independent training providers (total annual value £593,000) (“the Providers”).
3. On 1st April 2010 existing contracts between the LSC and the Providers were novated from the LSC to the Council under a statutory transfer scheme (Apprenticeships, Skills, Children and Learning Act 2009 (“ASCL Act”). It appears that these contracts expire on 31st July 2010 (although this has yet to be confirmed as the LSC has not provided local authorities with copies of the original contracts). Under the ASCL the Council has a statutory responsibility for 16-19 education provision.
4. The YPLA which has taken on the role of the LSC has determined allocations and named providers which the Council must contract with for the academic year 2010/11 under its own procurement rules. This will be dealt with in a grant agreement between the Council and the YPLA (yet to be issued).

B. Grounds for Exemption

Special factors relevant to the Contracts are cited by CYP&F as follows:

1. Grant Conditions imposed by YPLA

The YPLA has determined providers and allocations for the academic year 2010/11 and the Council will be bound by the YPLA’s grant conditions to pass on such allocations as directed.

2. YPLA procurement

The YPLA/LSC has followed its own procurement rules when selecting providers and making allocations. For some providers (particularly the colleges) providers will have been selected directly without competition whilst in other cases some form of competitive procurement may have been

followed. As a public body the LSC/YPLA is subject to the same procurement rules as local authorities.

3. The Council's Statutory Obligations

Under the ASCL Act the Council has a statutory duty to secure that enough suitable education and training is provided to meet the reasonable needs of—

- (a) persons in their area who are over compulsory school age but under 19, and
- (b) persons in their area who are aged 19 or over but under 25 and are subject to learning difficulty assessment.

If the Council decided to follow its own procurement process and allocate to providers other than those directed by YPLA it would be in breach of its grant agreement with YPLA and could not therefore guarantee receipt of the funding it requires to fulfil this duty.

C. Appraisal

1. In making its contract arrangements, the Council is required to demonstrate that it has acted in accordance with the EU Treaty-based principles of fairness, transparency, non-discrimination and proportionality (“the EU Principles”). Aside from the application of the Council’s own Contract Procedure Rules, public bodies are also required to comply with the Public Contracts Regulations 2006 (“the Regulations”), which impose further procedural requirements in relation to contracts for services over a prescribed pecuniary threshold.
2. Both the Contract Procedure Rules and the Regulations are drafted with the EU Principles in mind. The Regulations impose two levels of procedural requirement, depending on the nature of services being procured. The Contracts fall under the much less rigorous Part B regime imposed by the Regulations and are therefore subject to limited procedural requirements.
3. The Council is at risk of failing to comply with EU Principles in awarding the Contracts directly to providers without any form of competition.
4. The YPLA is a public body and so is also subject to the EU Principles when selecting providers and awarding contracts. It has, in the past, viewed certain types of provider (notably the colleges) as not requiring a competitive tender process. One assumes that its justification is that there are no or very few alternative providers for this type of provision and that this market has no cross-border interest.
5. The Contracts are for one year only and so this is a further factor that might mean the Contracts will not be of interest to alternative providers.
6. In assessing the risk of the Council being challenged on the basis of a failure to comply with EU Principles it is important to note that the allocations of the YPLA have been made at a national level and so these issues will affect all

local authorities not just the Council. It is also the way the LSC has been operating for several years without challenge.

7. Although there is some risk to the Council of such a challenge this is clearly outweighed by the greater risk if the Council failed to follow the YPLA's directions in respect of the selection of providers and the allocation of funding. In such circumstances the YPLA may withdraw funding and the Council would be unable to meet its statutory duties.
8. The County Solicitor considers therefore that the requested exemption is justified in these special circumstances.

D. Recommendations

In light of the information in the exemption report prepared by the Director of CYP&F, the County Solicitor recommends that the request for exemption is approved in these special circumstances.

Peter Clark
County Solicitor

26 May 2010

Division(s): N/A

CABINET – 22 JUNE 2010

REVIEW OF APPOINTMENTS

Report by Assistant Head of Legal & Democratic Services

Introduction

1. This report asks the Cabinet to consider member appointments to a variety of bodies which in different ways support the discharge of the Council's executive functions. The report identifies the basis on which appointments to the respective bodies have been made in the past and, subject to any adjustments that may be considered appropriate, invites the Cabinet to agree arrangements for filling the councillor places on those bodies.

Joint Committees

2. These are formal bodies set up to exercise statutory functions jointly with other authorities. Members of joint committees exercising executive functions must be members of the Cabinet.

The current joint committees are listed in **Section 1** of the Annex to this report.

Local Statutory Bodies

3. The County Council is required to set up and run a number of local bodies in connection with certain of its statutory functions, typically in partnership with other organisations. County Council representation is not generally limited to Cabinet Members although the view has been taken in the case of the Supporting People Commissioning Body that the appointee should be a Cabinet Member.

The current local statutory bodies are listed in **Section 2**.

Strategic Partnerships

4. This category comprises a small number of bodies, membership of which was agreed by Cabinet in November should be linked to the role of the cabinet member not to individually named members.

The current strategic partnerships are listed in **Section 3**.

Standing Advisory Bodies

5. This category comprises a small number of bodies which have been set up on a permanent basis in connection with particular functions. They do not

posses executive powers but provide a forum for discussion and liaison. County Council representation is not limited to Cabinet Members.

The current standing advisory bodies are listed in **Section 4**.

Informal Member/Officer Working Groups

6. This is a large and diverse group of informal bodies set up from time to time to assist with the discharge of the responsibilities of the Cabinet. There is a wide variety of form and purpose, from purely internal management tools to inter-authority forums for overseeing issues of common interest. Members and officers share an equal status on these bodies, which are not subject to the access to information rules applying to formal committees and sub-committees. However some are open to the public and allow public address at their meetings.
7. These bodies cannot exercise executive functions themselves but provide a valuable forum for discussion of issues outside the formal decision-making processes. Thus, where voting on such groups is permitted this can only be on the basis of an indicative view and cannot in any way bind the body responsible for the ultimate decision.

The informal member / officer working groups are listed in **Section 5**.

Member Champions

8. Under the Council's Constitution the Cabinet may designate member champions and appoint councillors to, and remove them from these roles.

The current member champions are listed in **Section 6**.

Outside Bodies

9. The Cabinet is responsible for appointments to those Outside Bodies which it has identified as 'strategic' and 'noted as such on a list of all relevant offices and bodies from time to time presented to and endorsed by the Council'. Appointments need to be made to those bodies for 2009/10 onwards.

The relevant outside bodies are listed in **Section 7**.

RECOMMENDATIONS

10. **The Cabinet is RECOMMENDED to:**
 - (a) **appoint Councillor Lorraine Lindsay-Gale to the position of 'Heritage Champion' (in place of Councillor Don Seale);**
 - (b) **create the new position of 'Motorcycle Champion' and appoint Councillor Lorraine Lindsay-Gale to that position;**

- (c) **create the new position of 'Efficiencies Champion' and appoint Councillor CH Shouler to that position; and**
- (d) **agree the remaining appointments as set out in the Annex to this report and, where necessary, make further or substitute appointments.**

TONY CLOKE
Assistant Head of Legal & Democratic Services

Background Papers Nil

Contact Officer: Tony Cloke Tel: (01865) 815314

June 2009

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Standing Joint Committees

<i>Joint Committee</i>	Places	Appointees for 2010/11
S.E. Fire & Rescue Services Regional Management Board	1	Cabinet Member for Safer & Stronger Communities - Heathcoat
Parking & Traffic Regulations Outside London Adjudication Committee	1	Cabinet Member for Transport - Rose
Thames Valley Police Authority Joint Committee	3	Mallon Patrick Viney

Local Statutory Bodies

Statutory Body	Places	Basis of Member Appointment	Con	Lib Dem	Lab	Grn
Admission Forum	2	On the nomination of the political groups according to political balance	2 Stratford Waine	0	0	0
Adoption & Permanency Panels & Fostering Panels	5	On the nomination of the political groups according to political balance: Adoption & Permanency Fostering	3 Fitzgerald- O'Connor Biles Tilley 2 Fitzgerald- O'Connor Tilley	0	0	0
Oxfordshire Supporting People Commissioning Body	1 1	Cabinet Member for Adult Services Alternate-Leader of the Council or his Cabinet nominee	1 Fatemian 1 Chapman	0	0	0
South East Fire & Rescue Control Centre Ltd.	1	Usually a Cabinet Member	1 Rose	0	0	0

Statutory Body	Places	Basis of Member Appointment	Con	Lib Dem	Lab	Grn
Standing Advisory Council for Religious Education (SACRE)	3	On the nomination of the political groups according to political balance	3 Mathew Viney Ahmed	0	0	0
Thames Valley Police Authority	2	Allocated by the TVPA Joint Committee to reflect the political proportionality of the TVPA area * S.20 Police Act 1996 - to respond to questions in Council	1 Heathcoat	1 Patrick*	0	0

SECTION 3**Strategic Partnerships**

Oxfordshire Partnership Board	Leader of the Council
Public Service Board	Deputy Leader of the Council
Thematic Partnerships: Children & Young People's Trust Health & Well Being Partnership Spatial Planning & Infrastructure Partnership Oxfordshire Economic Partnership Oxfordshire Safer Communities Partnership Oxfordshire Stronger Communities Alliance Environment & Waste Partnership	Cabinet Member for Children, Young People & Families and Cabinet Member for Schools Improvement Cabinet Member for Adult Services Cabinet Member for Growth & Infrastructure Deputy Leader of the Council Cabinet Member for Police & Policy Co-ordination Cabinet Member for Safer & Stronger Communities Cabinet Member for Growth & Infrastructure

Standing Advisory Bodies

Body	Places	Basis of Member Appointment	Con	Lib Dem	Lab	Grn
Music House Committee	3	On the nomination of the political groups according to political balance	3 Waine Fulljames Mitchell	0	0	0
Outdoor Centres House Committee	3	On the nomination of the political groups according to political balance	3 Brown Hayward Gearing	0	0	0
Oxfordshire Schools Forum	2 Observers (with no voting rights)	Constitution of the Forum Cabinet Members for CYP&F and Schools Improvement	2 Chapman Waine			

Body	Places	Basis of Member Appointment	Con	Lib Dem	Lab	Grn
Schools Organisation Stakeholder Group	5	On the nomination of the political groups according to political balance	4 Jones Nimmo-Smith Stratford +1	1 Altaf-Khan		
	2 observers (with no voting rights)	Cabinet Members for CYP&F and Schools Improvement	Chapman Waine			
Youth Work Advisory Group	5	On the nomination of the political groups according to political balance, one Councillor for each District Council area	4 Chapman-City Rose-West Fitzgerald-O'Connor-Vale Bonner-Cherwell	1 D.Turner - South	0	0

Informal Member/Officer Working Groups

Working Group	Places	Basis of Appointment	Con	Lib Dem	Lab	Grn
Abingdon Integrated Transport Strategy Working Group	3	Cabinet Member for Transport and two others nominated by the Leader of the Council Director for Environment & Economy and/or representative(s)	3 Rose Jones Michael Badcock	0	0	0
Corporate Parenting Panel	10	On the nomination of the political groups according to political balance, to include the Cabinet Members for Children, Young People & Families and Schools Improvement and the three members serving on the Fostering & Adoption Panels & Chairman of Children's Services Scrutiny Committee Director for Children, Young People & Families and Director for Social & Community Services or nominees	8 Billington Bonner Chapman Fitzgerald- O'Connor Handley Hibbert- Biles Tilley Waine	1 Fooks	1 V. Smith	0
Better Offices Programme	2	Leader of the Council and Cabinet Member for Finance & Property	2 Mitchell Couchman			
Climate Change Board	1	Cabinet Member for Growth & Infrastructure Representative(s) of all Directorates	1 Hudspeth	0	0	0

Working Group	Places	Basis of Appointment	Con	Lib Dem	Lab	Grn
Headington and Marston Area Transport Steering Group (HAMATS) (DORMANT)	3	Cabinet Members for Growth & Infrastructure and Transport and one other nominated by the Leader of the Council Representatives of Director for Environment & Economy	3 Hudspeth Rose Robertson			
ICT Steering Group	2	Deputy Leader of the Council and the Cabinet Member for Finance & Property CCMT and/or respective representative(s)	2 Robertson Couchman	0	0	0
Joint Oxfordshire Museums Group	3	On the nomination of the political groups according to political balance Head of Cultural & Adult Learning Services and/or representative(s)	3 Heathcoat Stratford Mathew	0	0	0
Minerals & Waste Local Plan Working Group	5	On the nomination of the political groups according to political balance, to include the Cabinet Members for Growth & Infrastructure and Transport (or respective nominees) Director for Environment & Economy and/or representative(s)	4 Hudspeth Reynolds Jones Greene	1 Purse	0	0
Oxfordshire County Council South Africa Link Group	4	On the nomination of the political groups according to political balance	3 Hibbert- Biles Lovatt Gearing	1 D. Turner	0	0

Working Group	Places	Basis of Appointment	Con	Lib Dem	Lab	Grn
School Governor Appointments Panel	6	On the nomination of the political groups according to political balance Representatives of the Children, Young People & Families Governors Team	4 Fitzgerald-O'Connor Hibbert-Biles Jones Waine	1 Altaf-Khan	1 Brighthouse	0
Social Inclusion Reference Group	5	On the nomination of the political groups according to political balance Representatives of all Directorates	4 Mitchell Fatemian Hibbert-Biles Tilley	1 Goddard	0	0
Special Educational Needs Partnership	5	On the nomination of the political groups according to political balance, to include the Cabinet Members for Children, Young People & Families and Schools Improvement Representatives of Headteachers, governors and teacher unions Director for Children, Young People & Families and/or representative(s)	4 Chapman Hayward Sexon Waine	1 Godden (sub. Altaf-Khan)	0	0
Strategic Procurement Board	1	Cabinet Member for Finance & Property A senior officer from each Directorate with responsibility for procurement; and a Strategic Procurement Manager	1 Couchman	0	0	0

Working Group	Places	Basis of Appointment	Con	Lib Dem	Lab	Grn
West End Steering Group	2	Leader of the Council and Deputy Leader	2 Mitchell Robertson	0	0	0

Member Champions

To be appointed* by the Cabinet:

- Bus Champion	Councillor Stewart Lilly
- Cycling	Councillor Arash Fatemian
- Heritage Champion	Councillor Don Seale (see recommendations)
- Motorcycle Champion	Councillor Lorraine Lindsay-Gale
- Older People's Champion	to be appointed
- Olympics Champion	Councillor Bill Service
- Risk Management	Chairman, Audit Committee

* See the Council's Constitution (Part 2, Article 2, Appendix 1) for guidance notes.

(Champions to produce:

- quarterly reports for all members via the web site on the following dates - 30 September, 31 December, 31 March, 30 June; and
- an annual report to Cabinet)

Strategic Outside Bodies

Outside Body	OCC Entitlement	Appointees for 2010/11
County Councils Network	4 county councillors	Hudspeth Hayward Robertson Tilley
Local Government Association	4 county councillors (* to cast additional OCC vote)	Hudspeth Mitchell* Robertson Tilley
LGA: Rural Commission	1 county councillor	Carter
LGA: Urban Commission	1 county councillor	Fatemian
Oxfordshire Association of Local Councils	1 county councillor	Jones
Oxfordshire Care Partnership Board	1 county councillor	Couchman Fatemian
Oxfordshire Countryside Access Forum	1 county councillor	Rose
Oxfordshire Rural Community Council	1 county councillor	David Nimmo Smith
South East Employers	3 county councillors + 3 <i>deputies (d)</i>	Robertson Wilmshurst Hallchurch <i>Rose</i> <i>Tilley</i> <i>Fatemian</i>
South East England Councils	1 county councillor + 1 <i>deputy (d)</i>	Hudspeth <i>Rose</i>
Thames Valley Waste Forum	2 county councillors	Hudspeth Greene

(Members to produce a single report after each meeting for all members via the Council's web site)

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Division(s): N/A

CABINET – 22 JUNE 2010

FORWARD PLAN AND FUTURE BUSINESS

Items identified from the Forward Plan for Forthcoming Decision

Topic/Decision	Portfolio/Ref
Cabinet, 20 July 2010	
<ul style="list-style-type: none"> <p>▪ Building Schools for the Future - July 2010 To set out the Building Schools for the Future model and its implications for the Council.</p> <p>▪ Delegated Powers of the Chief Executive - July 2010 To report on a quarterly basis any executive decision taken by the Chief Executive under the specific powers and functions delegated to her under the terms of Part 7.4 of the Council's Constitution – Paragraph 1(A)(c)(i). Item not for scrutiny call in.</p> <p>▪ Response to the Queen's Speech 2010 To agree a response to the legislative programme outlined in the Queen's Speech on 25 May 2010.</p> <p>▪ Adult Social Care Resource Allocation System Policy To seek approval of the resource allocation system as a means of providing financial resources to an individual who is supported by Adult Social Services.</p> <p>▪ Financial Monitoring - July 2010 Monthly financial report on revenue and capital spending against budget allocations, including virements between budget heads.</p> <p>▪ Treasury Management 2009/10 Outturn To review Treasury Management activity in 2009/10 in accordance with the CIPFA code of practice.</p> <p>▪ Local Transport Plan 3 - July 2010 To seek approval of the scenarios for the Plan.</p> <p>▪ Developer Contributions to Service Infrastructure To consider a summary of developer contributions secured to County service infrastructure through the planning process for 2009/10 and the amounts negotiated, received and spent throughout the year.</p> <p>▪ Expansion of Sandhills Primary School To consider the expansion of Sandhills Primary School and approve issue of statutory notice if objections received.</p> <p>▪ Expansion of Age Range at Uffington CE Primary School If objections are received, to consider the statutory notice to expand the age range at Uffington CE Primary School to 3-11.</p> <p>▪ Expansion of Age Range at Dr South's CE(A) Primary School If objections are received, to consider the statutory notice to expand the age range at Dr South's CE(A) Primary School to 3-11.</p> 	<ul style="list-style-type: none"> Cabinet, 2010/044 Cabinet, 2010/030 Cabinet, 2010/107 Cabinet, 2010/083 Cabinet, 2010/028 Cabinet, 2010/097 Cabinet, 2009/235 Cabinet, 2010/029 Cabinet, 2010/021 Cabinet, 2010/064 Cabinet, 2010/065

- **Cogges Link Road Compulsory Purchase and Side Roads Order** Cabinet, 2010/098
To seek authority to publish orders.

Cabinet Member for Children, Young People & Families, 6 July 2010

- **Chill Out Fund 2010/11 - July 2010** Cabinet Member for Children, Young People & Families, 2010/053
To consider applications received (if any) from the Chill Out Fund.
- **Early Years Capital Grants** Cabinet Member for Children, Young People & Families, 2010/106
To consider full applications received (if any) for Early Years Capital Grants.

Cabinet Member for Growth & Infrastructure, 15 July 2010

- **Van and Trailer Permitting** Cabinet Member for Growth & Infrastructure, 2010/099
To seek approval of the proposed policy on van and trailer permits at the Waste Recycling Centres in Oxfordshire.

Cabinet Member for Safer & Stronger Communities, 5 July 2010

- **Village Hall and Community Centre Grants 2010/11** Cabinet Member for Safer & Stronger Communities, 2010/031
The County Council's grant scheme for the improvement of village halls and other community buildings is administered by the Oxfordshire Rural Community Council (ORCC). This report summarises the applications received and recommends allocations from the grant fund for 2010/11.
- **Approval of the Trading Standards and Food Law Enforcement Plan** Cabinet Member for Safer & Stronger Communities, 2010/035
To consider the review and seek formal approval of the Trading Standards Service and Food Law Enforcement Plan as required by the Food Standards Agency Code of Practice for food law enforcement.
- **Trading Standards Service and Food Law Enforcement Plan and Tobacco Enforcement Plan** Cabinet Member for Safer & Stronger Communities, 2010/051
To seek approval of the Trading Standards "Service and Food Law Enforcement Plan" as required by the Food Law Code of Practice. To seek approval of the tobacco enforcement plan as required by section 5 of the Children and Young Persons (Protection from Tobacco) Act 1991.
- **Primary Authority Arrangements with the Trading Standards Service** Cabinet Member for Safer & Stronger Communities, 2010/080
To seek approval to enter into a formal Primary Authority partnership arrangement.

Cabinet Member for Schools Improvement, 6 July 2010

- **Expansion of Age Range at Uffington CE Primary School**
If no objections are received, to consider the statutory notice to expand the age range at Uffington CE Primary school to 3-11. Cabinet Member for Schools Improvement, 2010/061
- **Expansion of Age Range at Dr South's CE(A) Primary School**
If no objections are received, to consider the statutory notice to expand the age range at Dr South's CE(A) Primary School to 3-11. Cabinet Member for Schools Improvement, 2010/062
- **Expansion of Larkrise Primary School**
If no objections are received, to consider the statutory notice to expand Larkrise Primary School to 2-form entry. Cabinet Member for Schools Improvement, 2010/063

Cabinet Member for Transport, 15 July 2010

- **Bicester Market Square**
To seek approval for the proposed scheme to be taken forward to preliminary and detailed design stages. Cabinet Member for Transport, 2010/084
- **Proposed Improvements to Weirs Lane (Eastbound) Bus Stop (off Donnington Bridge Road), Oxford**
To seek approval to improve bus stop on Weirs Lane. Cabinet Member for Transport, 2010/096

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