

Agenda

www.oxford.gov.uk



City Executive Board

Date: **Thursday 9 February 2017**

Time: **5.00 pm**

Place: **St Aldate's Room, Town Hall**

For any further information please contact:

Sarah Claridge, Committee and Member Services Officer

Telephone: 01865 529920

Email: executiveboard@oxford.gov.uk

As a matter of courtesy, if you intend to record the meeting please let the Committee Services Officer know how you wish to do this before the start of the meeting.

City Executive Board

Membership

Chair	Councillor Bob Price	Corporate Strategy and Economic Development
	Councillor Ed Turner	Finance, Asset Management and Public Health
	Councillor Susan Brown	Customer and Corporate Services
	Councillor Alex Hollingsworth	Planning and Regulatory Services
	Councillor Pat Kennedy	Young People, Schools and Skills
	Councillor Mike Rowley	Housing
	Councillor Christine Simm	Culture and Communities
	Councillor Dee Sinclair	Community Safety
	Councillor Linda Smith	Leisure, Parks and Sport
	Councillor John Tanner	A Clean and Green Oxford

The quorum for this meeting is three, substitutes are not allowed.

Future items to be discussed by the City Executive Board can be found on the Forward Plan which is available on the Council's [website](#)

HOW TO OBTAIN A COPY OF THE AGENDA

In order to reduce the use of resources, our carbon footprint and our costs we will no longer produce paper copies of agenda over and above our minimum requirements. Paper copies may be looked at the Town Hall Reception and at Customer Services, St Aldate's.

A copy of the agenda may be:-

- Viewed on our website – mycouncil.oxford.gov.uk
- Downloaded from our website
- Subscribed to electronically by registering online at mycouncil.oxford.gov.uk

AGENDA

PART ONE PUBLIC BUSINESS

Pages

- 1 APOLOGIES FOR ABSENCE
- 2 DECLARATIONS OF INTEREST
- 3 ADDRESSES AND QUESTIONS BY MEMBERS OF THE PUBLIC
- 4 COUNCILLORS ADDRESSES ON ANY ITEM FOR DECISION ON THE BOARD'S AGENDA
- 5 COUNCILLOR ADDRESSES ON NEIGHBOURHOOD ISSUES
- 6 ITEMS RAISED BY BOARD MEMBERS
- 7 SCRUTINY COMMITTEE REPORTS

All scrutiny reports will be published in a supplementary agenda.

- a SCRUTINY RESPONSE: RECYCLING RATES
- b SCRUTINY RESPONSE: SAFEGUARDING LANGUAGE SCHOOL STUDENTS
- c SCRUTINY RESPONSE_CYCLING
- d SCRUTINY RESPONSE CARBON MANAGEMENT PLAN: 2017 -2022
- e SCRUTINY RESPONSE: GRANT ALLOCATIONS TO COMMUNITY AND VOLUNTARY ORGANISATIONS 2017/2018
- f SCRUTINY RESPONSE: UPDATE ON THE CORPORATE PLAN 2016- 2020
- g SCRUTINY RESPONSE: BUDGET 2017/2018
- h SCRUTINY RESPONSE: TREASURY MANAGEMENT STRATEGY 2017/18

8 TREASURY MANAGEMENT STRATEGY 2017/18

13 - 36

Lead Member: Councillor Turner, Board Member for Finance, Asset Management and Public Health

The Head of Financial Services has submitted a report which presents the Council's Treasury Management Strategy for 2017/18 together with the Prudential Indicators for 2017/18 to 2019/20.

Recommendations: That the City Executive Board resolves to:

1. **Recommend that Council** approve the Treasury Management Strategy 2017/18, and adopt the Prudential Indicators for 2017/18 – 2019/20 as set out in paragraphs 7 to 37, and Appendix 2;
2. **Recommend that Council** approve the Borrowing Strategy at paragraphs 7 to 18;
3. **Recommend that Council** approve the Minimum Revenue Provision (MRP) Statement at paragraphs 19 to 22 which sets out the Council's policy on charging borrowing to the revenue account; and
4. **Recommend that Council** approve the Investment Strategy for 2017/18 and investment criteria as set out in paragraphs 23 to 37 and Appendix 1.

9 SALE OF PROPERTIES TO OXFORD CITY HOUSING LIMITED

37 - 46

Lead Member: Councillor Rowley, Board Member for Housing

The Heads of Housing and Property Services and Financial Services have submitted a report which updates members on the progress of the housing company, to agree the transfer of 5 properties to the company and note the initial development programme.

Recommendations: That the City Executive Board resolves to:

1. **Note** progress with the establishment of the Oxford City Housing Company.
2. **Agree** to the sale of the 5 properties detailed at section 3 for the sum of £730,000 subject to the conditions set out in this report and subject to the verification of the valuation prices.
3. **Recommend that Council** make available in 2016-17, a state aid compliant loan facility for Oxford City Housing Limited to enable the company to purchase the 5 properties identified in this report; the loan being for £742,606 which includes the purchase price and the

associated costs of acquisition.

4. **Recommend that Council** include the provision of the loan facility mentioned above as an additional expenditure item in the 2016/17 capital programme, funded by the associated capital receipt received from the disposal.
5. **Delegate authority** to the Chief Executive in consultation with the Council's Chief Finance Officer and Monitoring Officer to agree the final decision on sale and amount of loan that needs to be made available to the company, should the final valuations vary from those contained in the report.
6. **Note** the draft development programme detailed in appendix 1 and that City Executive Board will receive further reports with regard to land sales to facilitate the delivery of that programme

10 BUDGET 2017/2018

47 - 182

Lead Member: Councillor Turner, Board Member for Finance, Asset Management and Public Health

The Head of Financial Services has submitted a report which presents the outcome of the budget consultation and the Council's Medium Term Financial Strategy for 2017-21 and 2017-18 Budget, for recommendation to Council

Recommendations: That the City Executive Board resolves to:

1. **Agree** the amendments to the Consultation Budget, in light of the outcomes of the public consultation.
2. **Recommend that Council** approve the 2017-18 General Fund and Housing Revenue Account budgets and the General Fund and Housing Revenue Account Medium Term Financial Plan as set out in Appendices 1-10, noting:
 - a) the Council's General Fund Budget Requirement of £21.055 million for 2017/18 and an increase in the Band D Council Tax of 1.99% or £5.67 per annum representing a Band D Council Tax of £290.19 per annum
 - b) the Housing Revenue Account budget for 2017/18 of £44.285 million and a reduction of 1% (£1.06/wk) in social dwelling rents from April 2017 giving a revised weekly average social rent of £105.65 as set out in Appendix 4
 - c) the General Fund and Housing Revenue Account Capital Programme as shown in Appendix 6.

3. **Recommend that Council** agree not to implement the voluntary 'Pay to Stay' policy for Council house tenants (para 28 refers)
4. **Recommend that Council** agree the fees and charges shown in Appendix 7
5. **Recommend that Council** delegate authority to the Section 151 Officer in consultation with the Board Member for Finance and Assets the decision to determine whether it is financially advantageous for the Council to enter into a Business Rates Distribution Agreement as referred to in paragraphs 16-17 below.
6. **Recommend that Council** agree an additional loan of up to £75k for working capital to Oxwed as highlighted in paragraph 41
7. **Recommend that Council** agree provision of a loan facility to Oxford City Housing Ltd of up to £61 million (paras 39-40) an extra £48.75 million over the next four years, subject to the provision of; and agreement to a business plan by the Company.

11 ANNUAL UPDATE ON THE CORPORATE PLAN 2016- 2020

183 - 200

Lead Member: Councillor Price, Board Member for Corporate Strategy and Economic Development

The Assistant Chief Executive has submitted a report which seeks approval of the 2016 annual update report on the Corporate Plan 2016-20

Recommendations: That the City Executive Board resolves to:

1. **Approve** the annual update report on the Corporate Plan 2016-20, as set out in Appendix 1.
2. **Delegate authority** to the Assistant Chief Executive to make minor textual/formatting changes to the annual update report in advance of formal publication

12 GRANT ALLOCATIONS TO COMMUNITY AND VOLUNTARY ORGANISATIONS 2017/2018

201 - 240

Lead Member: Councillor Simm, Board Member for Culture and Communities

The Head of Community Services has submitted a report to allocate grants to community and voluntary organisations through the Community Grants Programme.

Recommendations: That the City Executive Board resolves to:

1. **Approve** the recommendations for the 2017/2018 commissioning programme as set out in Appendix 1
2. **Approve** the recommendations for applications received to the grants annual open bidding programme as set out in Appendix 2
3. **Delegate authority** to the Executive Director for Organisational Development and Corporate Services in consultation with the Board Members for Customer and Corporate Services and Culture and Communities to allocate the residual funding in the Advice and Money Management commissioning theme.

13 REPORT ON THE COMMUNITY INFRASTRUCTURE LEVY (NEIGHBOURHOOD PORTION) - AGREEING THE EXPENDITURE DEADLINE FOR WARD FUNDS

241 - 244

Lead Member: Councillor Hollingsworth, Board Member for Planning and Regulatory Services

The Head of Planning and Regulatory has submitted a report to agree a deadline of expenditure of payment of the Neighbourhood portion of CIL to Wards (non parished).

Recommendation: That the City Executive Board resolves to:

1. **Agree** an amended expenditure deadline of Neighbourhood CIL funds paid into Ward budgets (non parished)

14 NORTH OXFORD VICTORIAN SUBURB CONSERVATION AREA APPRAISAL- ADOPTION

245 - 314

Lead Member: Councillor Hollingsworth, Board Member for Planning and Regulatory Services

The Head of Planning and Regulatory has submitted a report which presents the North Oxford Victorian Suburb Conservation Area Appraisal and seeks approval to go out to consultation.

Recommendations: That the City Executive Board resolves to:

1. **Endorse** the draft conservation area appraisal as the basis for public consultation (attached to this report);
2. **Approve** the carrying out of consultation upon the draft appraisal; and
3. **Approve** the seeking of views on additions and deletions to the conservation area.

15 REFRESH OF CARBON MANAGEMENT PLAN: 2017 -2022

315 - 366

Lead Member: Councillor Tanner, Board Member for A Clean and Green Oxford

The Manager of Environmental Sustainability has submitted a report to approve the next five year phase of the Council's Carbon Management Plan (CMP) 2017-2022. The current five year phase of the CMP concludes at the end of March 2017.

Recommendations: That the City Executive Board resolves to:

1. **Adopt** the new Carbon Management Plan as detailed in Appendix 1;
2. **Note** that now straight-forward and accessible carbon reduction measures have been implemented through use of the Salix and Salix Plus funds, there will be the need to make financial bids for external support for larger capital projects, additional match funding requests or innovative approaches of using community funding models with shared financial advantages;
3. **Endorse** the phased development of an Energy Management system (ISO 50001) over the next 5 years across all key significant energy use areas at the Council (e.g. Offices, Depots, Leisure Centres, Fleet fuel consumption).

16 MINUTES

367 - 372

Minutes of the meeting held on 19 January 2017

Recommendation: The City Executive Board NOTES the minutes of the meeting held on 19 January 2017 as a true and accurate record.

17 DATES OF FUTURE MEETINGS

Meetings are scheduled for the following dates:

9 March 2017
6 April 2017
11 May 2017
15 June 2017 – Special: Local Plan
20 June 2017
18 July 2017
15 August 2017 - Provisional
19 September 2017
17 October 2017
21 November 2017

19 December 2017

All meetings start at 5pm.



DECLARING INTERESTS

General duty

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

What is a disclosable pecuniary interest?

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

Declaring an interest

Where any matter disclosed in your Register of Interests is being considered at a meeting, you must declare that you have an interest. You should also disclose the nature as well as the existence of the interest.

If you have a disclosable pecuniary interest, after having declared it at the meeting you must not participate in discussion or voting on the item and must withdraw from the meeting whilst the matter is discussed.

Members' Code of Conduct and public perception

Even if you do not have a disclosable pecuniary interest in a matter, the Members' Code of Conduct says that a member "must serve only the public interest and must never improperly confer an advantage or disadvantage on any person including yourself" and that "you must not place yourself in situations where your honesty and integrity may be questioned". What this means is that the matter of interests must be viewed within the context of the Code as a whole and regard should continue to be paid to the perception of the public.

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

HOW OXFORD CITY COUNCILLORS AND MEMBERS OF THE PUBLIC CAN ENGAGE AT THE CITY EXECUTIVE BOARD

Addresses and questions by members of the public, (15 minutes in total)

Members of the public can submit questions in writing about any item for decision at the meeting. Questions, stating the relevant agenda item, must be received by the Head of Law and Governance by 9.30am two clear working day before the meeting (eg for a Thursday meeting, the deadline would be 9.30am on the Tuesday). Questions can be submitted either by letter or by email (executiveboard@oxford.gov.uk).

Answers to the questions will be provided in writing at the meeting; supplementary questions will not be allowed. If it is not possible to provide an answer at the meeting it will be included in the minutes that are published on the Council's website within 2 working days of the meeting.

The Chair has discretion in exceptional circumstances to agree that a submitted question or related statement (dealing with matters that appear on the agenda) can be asked verbally at the meeting. In these cases, the question and/or address is limited to 3 minutes, and will be answered verbally by the Chair or another Board member or an officer of the Council. The text of any proposed address must be submitted within the same timescale as questions.

For this agenda item the Chair's decision is final.

Councillors speaking at meetings

Oxford City councillors may, when the chair agrees, address the Board on an item for decision on the agenda (other than on the minutes). The member seeking to make an address must notify the Head of Law and Governance by 9.30am at least one clear working day before the meeting, stating the relevant agenda items. An address may last for no more than three minutes. If an address is made, the Board member who has political responsibility for the item for decision may respond or the Board will have regard to the points raised in reaching its decision.

Councillors speaking on Neighbourhood issues (10 minutes in total)

Any City Councillor can raise local issues on behalf of communities directly with the Board. The member seeking to make an address must notify the Head of Law and Governance by 9.30am at least one clear working day before the meeting, giving outline details of the issue. Priority will be given to those members who have not already addressed the Board within the year and in the order received. Issues can only be raised once unless otherwise agreed by the Board. The Board's responsibility will be to hear the issue and respond at the meeting, if possible, or arrange a written response within 10 working days.

Items raised by Board members

Such items must be submitted within the same timescale as questions and will be for discussion only and not for a Board decision. Any item which requires a decision of the Board will be the subject of a report to a future meeting of the Board

- a)
- b)

|

To: City Executive Board
Date: 9 February 2017
Report of: Head of Financial Services
Title of Report: Treasury Management Strategy 2017/18

Summary and recommendations	
Purpose of report:	To present the Council's Treasury Management Strategy for 2017/18 together with the Prudential Indicators for 2017/18 to 2019/20.
Key decision:	Yes
Executive Board Member:	Cllr Ed Turner, Finance, Asset Management and Public Health
Corporate Priority:	None
Policy Framework:	Treasury Management Strategy
Recommendation: That the City Executive Board resolves to:	
<ol style="list-style-type: none"> 1. Recommend that Council approve the Treasury Management Strategy 2017/18, and adopt the Prudential Indicators for 2017/18 – 2019/20 as set out in paragraphs 7 to 37, and Appendix 2; 2. Recommend that Council approve the Borrowing Strategy at paragraphs 7 to 18; 3. Recommend that Council approve the Minimum Revenue Provision (MRP) Statement at paragraphs 19 to 22 which sets out the Council's policy on charging borrowing to the revenue account; and 4. Recommend that Council approve the Investment Strategy for 2017/18 and investment criteria as set out in paragraphs 23 to 37 and Appendix 1. 	

Appendices	
Appendix 1	Credit and Counterparty Risk Management
Appendix 2	Prudential Indicators
Appendix 3	Risk Register

Executive Summary

1. This is the start of the body of your report. You must include at least one paragraph introducing the subject and setting out the background.
2. The Council's Treasury Management Strategy has been written in accordance with the CIPFA Prudential Code and the CIPFA Treasury Management Code of Practice. The main changes proposed to the Strategy are:
 - a. The introduction of a monetary limit to non-specified investments in addition to the percentage limit to enable the continuation of investments in Property Funds
 - b. An updated Borrowing Strategy and policy on borrowing in advance of need
3. The report presents the Council's prudential indicators for 2017/18 – 2019/20. Notable indicators include capital expenditure and borrowing limits as these are areas of significant activity.
4. The average value of investments during the financial year to 30th November 2016 is £82.1m. The actual daily value has fluctuated between £69.1m to £94.0m. This is an increase on the previous year, when average balances were £71.4m and daily values ranged from £55.7m to £86.2m.
5. All external debt as at 31 March 2017 (£198.5m) relates to the Housing Revenue Account self-financing debt taken out in 2012 which is held at fixed rates with varying fixed periods to maturity.
6. The Council's General Fund Capital Programme over the next four years is funded from a combination of government grants, capital receipts, revenue resources, Community Infrastructure Levy and prudential borrowing. However, due to the scale of investment over the period, particularly the loans to the Council's Housing Company (£60 million), the level of prudential borrowing has increased to £80.9 million. Borrowing from internal resources will be maximised, however much of the borrowing will need to be from external resources.
7. The Housing Capital Programme is funded directly from council house rents.

Treasury Management Strategy Borrowing and Debt Strategy 2017/18

8. Under the Prudential Code, individual authorities are responsible for deciding their level of borrowing. The system is designed to allow authorities with an affordable borrowing requirement, to borrow in order to pay for capital investment.
9. The arrangements also facilitate 'invest to save' schemes where they are affordable, prudent and sustainable.
10. The parameters for determining the level of prudential borrowing are:

- A balanced revenue budget that includes the revenue consequences of any capital financing i.e. interest, debt repayment and running costs of any new project;
 - That the impact of the Authorised Borrowing Limit on Council Tax or council rents is reasonable.
11. The draft Capital Programme, which appears elsewhere on the Agenda; includes the following expenditure which is currently planned to be financed by borrowing:
- £4.2 million loan to Oxford West End Development Limited for investment in the regeneration of Oxpens;
 - £60 million loan to the Housing Company, primarily to finance the purchase of New Build homes for Affordable Housing at Barton and other housing;
 - £9.7 million for the acquisition of Investment Properties that will generate additional revenue income; and
 - £10 million for the purchase of properties to be used for homeless accommodation
12. The S151 officer has delegated authority to determine the need for external borrowing taking into account prevailing interest rates and associated risks. A combination of long-term and short-term fixed and variable rate borrowing may be considered. This may include borrowing in advance of future years' requirements.
13. Borrowing may be undertaken to fund the approved Capital Programme or to fund future debt maturities. The S151 Officer will adopt a cautious approach and take into account the following factors:
- The on-going revenue liabilities created, and the implications for the future plans and budgets;
 - The economic and market factors that might influence the manner and timing of any decision to borrow;
 - The pros and cons of alternative forms of funding including internal borrowing;
 - The impact of borrowing in advance on cash balances and the consequent increase in counterparty risk.
14. Council officers, in conjunction with our treasury advisors, Capita Asset Services - Treasury Solutions, monitor both prevailing interest rates and market forecasts, thereby allowing the Council to respond to any changes that may impact on the timing and manner of borrowing decisions, to ensure these are optimised.
15. The Council currently has £198.5m of external debt held at fixed rates with varying maturity terms up to 2057. This debt relates to the Council's housing stock within its HRA. The first repayment is due in 2020/21.
16. The Council's Capital Financing Requirement is an indication of the Council's underlying need to borrow to fund its capital investments; this borrowing can be undertaken internally using available resources or externally by borrowing from a

financial institution or the Public Works Loans Board (PWLB) – see also paragraph 16.

Borrowing Strategy 2017/18

17. The Council currently has £22 million of internal borrowing. This means that the capital borrowing need (the Capital Financing Requirement), has not been fully funded with loan debt as cash supporting the Council's reserves, balances and cash flow has been used as a temporary funding source. This strategy is prudent as investment returns are low and counterparty risk is still an issue that needs to be considered.
18. The Head of Financial Services will continue to monitor interest rates and adopt a pragmatic approach to changing circumstances:
 - if it is felt that there is a likelihood of a significant fall in long and short term rates (e.g. due to a marked increase of risks around relapse into recession or of risks of deflation), then long term borrowing will be postponed, and potential rescheduling from fixed rate funding into short term borrowing will be considered.
 - Alternately if it is felt that there is a significant risk of a sharp increase in long and short term rates than currently forecast, then external borrowing is likely to be taken earlier.

Borrowing in Advance of Need

19. Any decision to borrow in advance will be within approved Capital Financing Requirement estimates, and demonstrate value for money. Prior to borrowing in advance the risks and benefits of undertaking the borrowing will be considered. Actual borrowing will be subsequently reported through either the mid-year performance report or annual report as appropriate.

Minimum Revenue Provision (MRP) Statement 2017/18

20. Prudential borrowing increases the Council's Capital Financing Requirement (CFR) or underlying need to borrow. Whether the Council actually borrows to finance capital expenditure is a treasury management decision unconnected to the capital financing decision. In practice, the Council is likely to use a combination of internal and external borrowing in the medium term to fund the Capital Programme. The amount of external borrowing undertaken will depend on the borrowing requirement compared to the projected level of cash balances. The Council is required to make a prudent charge to its revenue account for borrowing. This charge is known as the Minimum Revenue Provision (MRP) and reflects the repayment of principal borrowed. In some circumstances there is no need to charge a MRP; these circumstances are identified in paragraph 24 and item (d) below.
21. Regulations require the Council to approve an MRP policy on an annual basis. The following statement is recommended for 2017/18:

- a) For capital expenditure incurred before 1 April 2008 or which in the future will be supported capital expenditure¹, existing practice, outlined in the former Department for Communities and Local Government (DCLG) regulations will apply.
 - b) For capital expenditure that relates to the assets transferred from the Housing Revenue Account (HRA) to the General Fund (GF) MRP will be based on the estimated useful life of the assets, taking into account the number of years the assets have been in existence, and previous funding allocated to them.
 - c) For all unsupported borrowing² incurred after 1 April 2008 the MRP policy will be the Asset Life Method (with the exception of d) below), i.e. the MRP will be based on the estimated life of the asset and borrowing will be charged to the revenue account in equal instalments over the life of the asset.
 - d) In respect of the Council's investments in a Directly Managed Property Fund or loans to other organisations such as a company in which the Council has an interest, under s25(b)/s25(d) of The Local Authorities Capital Finance and Accounting (England) Regulations 2003 the Council will make no MRP provision as it is anticipated the investment will be repaid in full. The investment and CFR position will be reviewed on at least an annual basis and if there is a likelihood of capital loss, a prudent MRP provision will then be made.
22. The HRA is not required to make a MRP but is required to make a depreciation charge. Regulations allowed the Major Repairs Allowance (MRA) to be used as a proxy for depreciation for the first five years of the HRA self-financing scheme, from the 1st April 2017 this is no longer possible and depreciation will be a real cost to the HRA. Depreciation on HRA properties is estimated at @ £6 million per annum over the period.

Investment Strategy 2017/18

Interest rates

- 23. Average cash balances for the year to 30th November 2016 were £82.1m, having fluctuated between £69.1m to £94.0m.
- 24. Interest rates are at an all-time low, with the Bank of England's Monetary Policy Committee having cut the base rate in August 2016 to 0.25%. The Council's treasury advisors expect rates to remain at this level throughout 2017 and 2018 before rising back to 0.5% in second quarter of 2019.
- 25. Most existing investment deal terms are for 6 months, a reduction from last year's 12 month's duration. This is in line with the Council's Treasury advisors counterparty guidelines and reflects market/economic uncertainty arising following the vote to leave the European Union. The Strategy allows for investments beyond 6 months with high quality counterparties; e.g. property funds, Local, Fire and

¹ Supported Capital Expenditure means the total amount of capital expenditure which a local authority has been notified by Government will be given as part of the grant payment

² Unsupported borrowing is any borrowing not covered by Government grants.

Police Authorities, other local authorities and the National Homelessness Property Fund.

26. Investments are made in accordance with the Council's Treasury Management Strategy such that returns are balanced against security of investment, liquidity of cash to ensure funding of day to day cash flows and yield. Consequently, procedures are in place to determine the maximum periods that funds may be invested for, as well as the nature of those investments.
27. The Council works to achieve the optimum rate of return on its investments commensurate with proper levels of security and liquidity.
28. Investment instruments identified for use are listed in Appendix 1 under the specified and non-specified investment categories. Counterparty limits are set in accordance with the Council's Treasury Management Practices (TMPs).
29. The Council utilises the creditworthiness services provided by Capita Asset Services – Treasury Solutions. The model combines the credit ratings, credit watches and credit outlooks provided by the credit rating agencies - Fitch, Moody's and Standard and Poor's in a weighted scoring system which is then combined with an overlay of Credit Default Swap³ (CDS) spreads and sovereign ratings for which the end product is a series of colour coded bands which indicate the relative creditworthiness of counterparties. These colour codes are used by the Council to determine the duration of investments.
30. The Council is alerted to changes to ratings by Capita Asset Services -Treasury solutions' creditworthiness service and takes the following action in respect of this update:
 - If a downgrade results in the counterparty/investment scheme no longer meeting the Council's minimum criteria, it is withdrawn immediately from further use
 - If a counterparty's credit rating is placed on negative watch or negative outlook, officers carry out a review to determine whether the institution is still worthy of inclusion on the counterparty list. If there is any doubt, the counterparty is temporarily suspended pending the credit rating agency's full review.

The contract for Treasury Advisors was extended for two years in September 2016.

31. As part of the creditworthiness methodology a minimum sovereign rating of AA- from Fitch (or equivalent from other agencies if Fitch does not provide) has been determined.
32. In addition to the recommendations from Capita Asset Services, the S151 Officer and Treasury Management Team have agreed to limit the amounts invested with any one country (excluding the UK) or sector as follows:

³ A financial swap agreement that the seller of the CDS will compensate the buyer in the event of default

- No more than 20% of the previous year's average investment balance with any one counterparty or group (currently £14.13m) or £15m, whichever is the greater
 - Maximum of 10% of total investments to be with institutions in other countries that meet the required criteria.
33. To ensure that the Strategy is not breached and to also be aware of any new opportunities, the Council's counterparty list is reviewed on a daily basis taking into account market information and changes to the methodology used. The list is maintained by the Treasury Management Team, and reported to the S151 Officer on a regular basis.
34. The Investment Strategy provides delegated authority for the S151 Officer to determine the most appropriate form of investment dependant on prevailing interest rates and counterparty risk at the time.

Specified and Non-Specified investments

35. In approving the Investment Strategy, Members are approving the types of investments the Council can undertake. Investments are classified as either specified or non-specified and are shown in more detail in Appendix 1.
36. Currently, the Strategy defines a specified investment as one that is in sterling, no more than one year in duration or, if in excess of one year can be repaid earlier on request and with counterparties that meet the Council's credit rating criteria. Additionally, once the duration of a non-specified investment falls below 365 days, it also falls into the specified category.
37. Non-specified investments are any other type of investment including property funds. Whilst generally these investments will earn a higher rate of return they are inherently more risky in nature and a maximum level of 25% of the previous year's average monthly investment balance or £15 million, whichever is the greater is placed in such investments.
38. Investments may be arranged in advance and there has been a significant rise in "forward deals" in recent times. Trades arranged up to four weeks in advance of the start date will still be classified as specified investments, provided the duration of the investment from the start date to the maturity are no longer than 364 days. Trade dates are factored into the duration of the investment if arranged in advance by more than this period because there is an increased risk due to funds being contractually committed.

Loans to companies in which the Council has an interest

39. A loan for capital purposes to a company in which the Council has an interest will be categorised as capital expenditure by the Council. This ensures that the Council can take out external borrowing to fund these loans as necessary. The Council could fund this capital expenditure from any capital resource however the majority will be funded from external borrowing. The MRP provisions in respect of

any loans to a Company are covered in paragraph 23 d). The Council will undertake these loans under powers other than its investment powers.

Ethical Investment Policy

40. Council adopted an ethical investment policy in 2015/16, which is set out below. No changes are proposed to this policy for 2017/18.

41. The Council will not knowingly invest directly in businesses whose activities and practices pose a risk of serious harm to individuals or groups, or whose activities are inconsistent with the Council's mission and values. This would include, inter alia, avoiding direct investment in institutions with material links to:

- c. Human rights abuse (e.g. child labour, political oppression)
- d. Environmentally harmful activities (e.g. pollutants, destruction of habitat, fossil fuels)
- e. Socially harmful activities (e.g. tobacco, gambling)

42. In November 2016 Lloyds Bank launched a Community Lending Report Deposit which specifically invests in local businesses at a rate equivalent to an ordinary deposit. An account has been opened and is ready to accept new investments when an opportunity arises. The Council has also opened an account with Royal London Asset Management which operates its investments using ethical principles; the Council currently has £8 million invested in this account.

Prudential Indicators

43. The Council is required to set out a number of indicators, relating to the affordability and prudence of its Treasury Strategy. These indicators are detailed in Appendix 2 for the period 2017/18 – 2019/20, and will be monitored and reported on an annual basis.

Other implications

44. Environmental Impact – following the inclusion of the Ethical Investment Policy, this ensures that through our investments we will not knowingly, directly invest in businesses that undertake harmful environmental activities.

Financial implications

45. All financial issues have been addressed in the body of the report.

Legal issues

46. This report fulfils four key requirements:

- The reporting of the Prudential Indicators setting out the Council's expected capital activities (as required by the CIPFA Prudential Code for Capital Finance in Local Authorities).
- Agreeing the Council's Minimum Revenue Provision (MRP) Policy, which sets out how the Council will pay for capital assets through revenue each year (as required by guidance under the Local Government and Public Involvement in Health Act 2007).

- Agreeing the Treasury Management Strategy, which links day to day Treasury Management to the Capital Programme and the Treasury Management Prudential Indicators. The key indicator is the Authorised Limit, the maximum amount of debt the Council could afford in the short term, but which would not be sustainable in the longer term. This is the Affordable Borrowing limit required by S3 of the Local Government Act 2003.
- Agreeing the Investment Strategy, this sets out the Council's criteria for choosing investment counterparties and limiting exposure to the risk of loss.

47. The Local Government Act 2003 and supporting regulations require the Council to have regard to the CIPFA Prudential Code and the CIPFA Treasury Management Code of Practice to set prudential and treasury indicators to ensure that the Council's capital investment plans are affordable, prudent and sustainable.

48. The Constitution requires the Strategy to be reported to the City Executive Board and Full Council outlining the expected treasury activity for the forthcoming four years on an annual basis.

Level of risk

49. The risk register is attached at Appendix 3.

Equalities impact

50. There are no equalities impacts relating to this report.

Report author	Bill Lewis
Job title	Financial Accounting Manager
Service area or department	Financial Services
Telephone	01865 252607
e-mail	blewis@oxford.gov.uk

Background Papers: None

This page is intentionally left blank

Treasury Management Practice (TMP) 1 – Credit and Counterparty Risk Management

The Department of Communities and Local Government (CLG) issued Investment Guidance in 2010, and this forms the structure of the Council's policy below.

The key intention of the Guidance is to maintain the current requirement for Councils to invest prudently, and that priority is given to security and liquidity before yield. In order to facilitate this objective the guidance requires Councils to have regard to the CIPFA publication *Treasury Management in the Public Services: Code of Practice and Cross-Sectoral Guidance Notes*. This Council has adopted the Code and will apply its principles to all investment activity. In accordance with the Code, the Section 151 Officer has produced Treasury Management Practices (TMPs). This part, TMP 1, covering investment counterparty policy requires approval each year.

Annual Investment Strategy - The key requirements of both the Code and the investment guidance are that Councils set an annual Investment Strategy, as part of their Treasury Strategy for the following year, covering the identification and approval of the following:

- The guidelines for choosing and placing investments, particularly non-specified investments.
- The principles to be used to determine the maximum periods for which funds can be committed.
- Specified investments the Council will use.
- Non-specified investments the Council will use, clarifying the greater risk implications, and the overall amount of various categories that can be held at any time.

Maturity periods are defined as the remaining length of an investment period. Arranging a deal in advance by up to four weeks is not considered to add to the duration of the investment.

In addition to the investments identified below as specified and non-specified investments, the Council may provide loans to a company in which the Council has an interest. These loans are outside the limits specified in the tables below and may be matched by equivalent external borrowing. The loans will then be given at a rate that at least covers the Council's costs and that is compliant with State Aid requirements.

Specified Investments – These investments are sterling investments that do not exceed a maturity period of one year, or where the maturity period is longer, the Council has the right to be repaid within twelve months if it wishes. These are considered low risk assets where the possibility of loss of principal or investment income is small. These would include sterling investments which would not be defined as capital expenditure with:

1. The UK Government (such as the Debt Management Account deposit facility, UK Treasury Bills or Gilts with less than one year to maturity).

2. Supranational bonds of less than one year's duration.
3. A Local Authority, Parish Council, Community Council, Fire or Police Authority
4. Pooled investment vehicles that have been awarded a high credit rating by a credit rating agency, e.g. money market funds, rated AAA by Standard and Poor's, Moody's or Fitch rating agencies.
5. A body that is considered of a high credit quality (such as a bank or building society) meeting the minimum 'high' quality criteria where applicable.

Additionally, and in accordance with the Code, the Council has set duration and value limits as follows:

Specified Investments - Limits on value and period

	Minimum credit criteria/colour banding	Max % of total investments / £ limit per institution	Max maturity period
Debt Management Office – UK Government	Not applicable	100%	364 days
UK Government Gilts	UK Sovereign rating	20%	364 days
UK Government Treasury Bills	UK Sovereign rating	20%	364 days
Bonds issued by multilateral development banks	UK Sovereign rating	20%	6 months
Money Market Fund	AAA	£25m	Liquid
Local Authorities, Fire and Police Authorities		20%	364 days
Term deposits with banks and rated building societies	Blue Orange Red Green	£15m or 20% of total investments whichever is the greater	Up to 1 year Up to 1 year Up to 6 Months Up to 100 days
Certificate of Deposit or corporate bonds with banks and building societies	Blue Orange Red Green	£10m or 20% of total investments whichever is the greater	Up to 1 year Up to 1 year Up to 6 Months Up to 100 days
Enhanced Cash funds		20%	6 months
Corporate bond funds		20%	6 months
Gilt Funds	UK sovereign rating	20%	6 months

The colour ratings above for the Term deposits with banks and rated building societies and Certificates of Deposit or corporate bonds with banks and building societies link the durations in the right hand column to colour coding used in Capita's Credit List i.e. blue and orange coloured institutions recommend investments of upto a year according to the Capita Credit List

Non-Specified Investments – Non-specified investments are any other type of investment not defined as Specified. The identification and rationale supporting the selection of these other investments and the maximum limits to be applied are set out below. Overall Non-specified investments (excluding loans to a company in which the Council has an interest) will not exceed more than 25% of the previous year’s total investment portfolio. If the Council’s average investment balance increases further over the medium term, decisions will need to be made on the viability of undertaking additional Non-specified Investments. The level of investment in a particular counterparty will be measured based on the amount of the initial investment. Non specified Investments would include any sterling investments with:

Non-Specified Investments - Limits on value and period

	Minimum Credit Criteria	Max % of total investments/£ limit per institution	Max maturity period
Local Authorities, Fire and Police Authorities		15% of total investments	Up to 2 years
Fixed term deposits with variable rate and variable maturities	Orange	15% of total investments	Up to 1 year
Fixed term deposits with variable rate and variable maturities	Yellow Purple	£10m or 20% of total investments	Up to 5 years Up to 2 years
Commercial paper issuance covered by a specific UK Government (explicit) guarantee		10% of total investments	Up to 1 year
Fixed term deposits with unrated Building Societies	Asset Base over £9bn	£3m – 20% of total investments	100 days
Commercial paper other		15% of total investments	Up to 1 year
Corporate bonds		15% of total investments	Up to 1 year
Other debt issuance by UK banks covered by UK Government (explicit) guarantee		15% of total investments	Up to 1 year
Floating rate notes		15% of total investments	Up to 1 year
Indirect Property funds		25% of total investments or £15 million, whichever is the greater	Medium to long term
National Homelessness Property Fund		25% of total investments or £5 million, whichever is the greater	Medium to long term

The colour ratings above for the Term deposits with banks and rated building societies and Certificates of Deposit or corporate bonds with banks and building societies link the durations in the right hand column to colour coding used in Capita's Credit List i.e. investments with yellow coloured institutions are recommended for upto 60 months (5 years) according to the Capita Credit List

The Monitoring of Investment Counterparties - The Council receives credit rating information (changes, rating watches and rating outlooks) from Capita Asset Services – Treasury Solutions on a weekly basis, and counterparties are checked promptly. On occasion ratings may be downgraded when an investment has already been made. The criteria used are such that a minor downgrading should not affect the full receipt of the principal and interest. Any counterparty failing to meet the criteria will be removed from the list immediately by the Section 151 Officer, and if required new counterparties which meet the criteria will be added to the list. The Council also monitors counterparties against the limits specified below:

<u>Duration Limits (based on Fitch ratings)</u>		
Long Term Rating	Short Term Rating	
	F1+	F1
AAA	2 years	364 days
AA+	2 years	364 days
AA	2 years	9 months
AA-	2 years	9 months
A+	364 days	9 months
A	9 months	6 months
A-	6 months	3 months

This page is intentionally left blank

APPENDIX 2

Prudential Indicators

A. Capital Expenditure Plans

1. The Council's capital expenditure plans are the key driver of treasury management activity. Estimates of capital expenditure for the period 2016/17 to 2019/20 based on the Council's draft Capital Programme are summarised below and this forms the first of the prudential indicators. The revenue consequences of associated borrowing and any on-going maintenance costs are accommodated within the Council's revenue budgets.
2. Capital expenditure can be paid for immediately, by applying capital resources such as capital receipts, capital grants, external funding or revenue contributions, but if these resources are insufficient any residual expenditure will be covered by Prudential Borrowing and will add to the Council's borrowing need, or Capital Financing Requirement (CFR).
3. Estimates of resources such as capital receipts may be subject to uncertainty i.e. anticipated asset sales may be postponed or reduced due to changes in the property market or planning issues.
4. Elsewhere on the agenda the draft Capital Programme is recommended for approval. The table below summarises the proposed expenditure and how it will be financed. Any shortfall of financing results in a borrowing need.

Table 1:- Capital Expenditure and Financing

	2015/16 Actuals £000's	2016/17 Estimate £000's	2017/18 Estimate £000's	2018/19 Estimate £000's	2019/20 Estimate £000's
Expenditure					
General Fund	17,129.0	19,922.0	40,859.0	42,980.0	22,153.0
HRA	15,579.0	22,168.0	19,900.0	17,858.0	17,946.0
Total expenditure	32,708.0	42,090.0	60,759.0	60,838.0	40,099.0
Financed by:					
Developer Contributions	706.0	582.0	2,528.0	580.0	750.0
Capital Grants	6,336.0	2,501.0	9,838.0	1,493.0	581.0
Capital Receipts	9,765.0	7,684.0	9,918.0	3,346.0	3,727.0
Revenue	7,724.0	5,630.0	5,951.0	14,219.0	12,090.0
Major Repairs Reserve	8,177.0	20,105.0	15,104.0	6,161.0	6,243.0
Sub Total	32,708.0	36,502.0	43,339.0	25,799.0	23,391.0
Prudential Borrowing	0	5,588	17,420.0	35,039.0	16,708.0
Total funding	32,708.0	42,090.0	60,759.0	60,838.0	40,099.0

B. Capital Financing Requirement (CFR).

5. The CFR is the total outstanding capital expenditure which has not yet been paid for from either revenue or capital resources. It is essentially a measure of the Council's underlying need to borrow.
6. The CFR also includes other long term liabilities (e.g. finance leases). Whilst these increase the CFR, and therefore the Council's borrowing requirement, these types of scheme include a borrowing facility and so the Council is not required to separately borrow for these schemes.

Table 2:- Capital Financing Requirement

	2015/16 Actuals £000's	2016/17 Estimate £000's	2017/18 Estimate £000's	2018/19 Estimate £000's	2019/20 Estimate £000's
General Fund	22,341	26,825	44,207	78,876	95,088
HRA	198,528	198,528	198,528	198,528	198,528
	220,869	225,353	242,735	277,404	293,616

Movement in CFR	318	4,484	17,382	34,669	16,212
-----------------	-----	-------	--------	--------	--------

C. Ratio of Financing Costs to the Net Revenue Stream

7. This indicator represents the estimate of the ratio of financing costs to the net revenue stream for both the HRA and General Fund.

Table 3:- Ratio of financing costs to net revenue stream

	2015/16 Actuals £000's	2016/17 Estimate £000's	2017/18 Estimate £000's	2018/19 Estimate £000's	2019/20 Estimate £000's
General Fund	-9.1%	-3.8%	-4.6%	-3.2%	-2.0%
HRA	16.8%	17.3%	18.7%	19.1%	19.2%

D. Incremental Impact of Capital Investment Decisions on Council Tax and Rents

Council Tax

8. The estimate of the incremental impact of capital investment decisions on the Council Tax is shown below; it illustrates the impact of capital investment decisions on the Band D Council Tax.
9. The figures in Table 4 below have been calculated by looking at those schemes that are uncommitted in the current Capital Programme and looking at the impact they will have on Council Tax after taking into account capital receipts, grants and revenue contributions
10. The Council will not enter into any uncommitted capital scheme until the source of funding is confirmed, e.g. Capital receipts, grants, S106 or

prudential borrowing. This will ensure we can avoid any unplanned revenue consequences as a result of capital expenditure.

Table 4:- Potential Impact of Capital Expenditure on Council Tax

	2015/16 Actuals £	2016/17 Estimate £	2017/18 Estimate £	2018/19 Estimate £	2019/20 Estimate £
Overall net impact on Council Tax Band D per week	0.26	0.30	0.60	0.63	0.32

Housing Rents

11. The estimated incremental impact of capital investment decisions on weekly housing rents is shown in Table 5 below. The figures have been calculated by looking at those schemes that are currently in the Capital Programme and deducting alternate funding resources.

12. The key driver for setting housing rents is legislation.

13. The expected expenditure on the HRA Capital Programme could have the following impact on Council rents if rents were not otherwise restricted:

Table 5:- Potential Impact of Capital Expenditure on Housing Rents

	2015/16 Actuals £	2016/17 Estimate £	2017/18 Estimate £	2018/19 Estimate £	2019/20 Estimate £
Overall net impact on Weekly Housing Rents	1.31	1.88	1.70	1.53	1.55

E. Authorised Limit for External Debt

14. This represents a limit beyond which external debt is prohibited. It reflects the level of external debt, which, while not desired, could be afforded in the short term, but is not sustainable in the longer term. This is the statutory limit determined under section 3 (1) of the Local Government Act 2003.

Table 6:- Authorised Limit for external debt

	2015/16 Actuals £000's	2016/17 Estimate £000's	2017/18 Estimate £000's	2018/19 Estimate £000's	2019/20 Estimate £000's
General Fund	14,232	95,000	95,000	95,000	95,000
HRA	241,188	242,199	242,199	242,199	242,199
Other Long Term Liabilities	0	0	0	0	0
Total	255,420	337,199	337,199	337,199	337,199

15. Separately, the Council is also limited to a maximum HRA CFR through the HRA self-financing regime. It is considered prudent to withhold £10m of the borrowing headroom as a contingency for potential changes in capital costs and interest charges although the authorised limit allows for borrowing up to the limit. These limits are:

Table 7: HRA Capital Financing Requirement Limit

HRA Debt Limit	2015/16 Actuals £000's	2016/17 Estimate £000's	2017/18 Estimate £000's	2018/19 Estimate £000's	2019/20 Estimate £000's
Total	242,199	242,199	242,199	242,199	242,199

F. Operational Boundary for External Debt

16. This is based on the expected maximum external debt during the course of the year, it is not a limit, and actual external debt can vary around this boundary for short times during the year.

Table 8:- Operational boundary for external debt

	2015/16 Actuals £000's	2016/17 Estimate £000's	2017/18 Estimate £000's	2018/19 Estimate £000's	2019/20 Estimate £000's
General Fund	12,232	27,000	45,000	79,000	96,000
HRA	234,000	198,528	198,528	198,528	198,528
Other Long Term Liabilities	0	0	0	0	0
Total	246,232	225,528	243,528	277,528	294,528

G. Net Borrowing Compared to the Council's Capital Financing Requirement

17. Table 9 below shows the Council's net borrowing position compared to its Capital Financing Requirement. As can be seen, the figures show that the Council is currently borrowing below its financing requirement which indicates a need to borrow in the medium term. The Council needs to ensure that its total borrowing net of any investments, does not, except in the short term, exceed the total of the CFR in the preceding year plus the estimates of any additional CFR for the current and next two financial years. This allows some flexibility for limited early borrowing for future years.

Table 9:- Net borrowing compared to CFR

	2015/16 Actuals £000's	2016/17 Estimate £000's	2017/18 Estimate £000's	2018/19 Estimate £000's	2019/20 Estimate £000's
Gross Borrowing	198,528	198,528	210,528	245,528	260,528
Other Long Term Liabilities	0	0	0	0	0
Total Gross Debt 31 March	198,528	198,528	210,528	245,528	260,528
CFR	220,869	225,353	242,735	277,404	293,616
Net Borrowing v CFR	22,341	26,825	32,207	31,876	33,088

H. Compliance with the CIPFA Code of Practice for Treasury Management in the Public Sector

18. The Council can confirm that it has complied with this code throughout 2016/17 and will continue to do so.

I. Upper Limit on Fixed and Variable Interest Rate Borrowing and Investments

19. The purpose of this and the following two prudential indicators is to contain the activity of the treasury function within certain limits, thereby managing risk and reducing the impact of an adverse movement in interest rates. This indicator identifies the maximum limit for fixed interest rates based upon the debt position net of investments.

Table 10:- Upper limit on borrowing and investments

	2015/16 Actuals %	2016/17 Estimate %	2017/18 Estimate %	2018/19 Estimate %	2019/20 Estimate %
Upper limit on fixed rate borrowing	100	100	100	100	100
Upper limit on fixed rate investments	100	100	100	100	100
Upper limit on variable rate borrowing	100	100	100	100	100
Upper limit on variable rate investments	100	100	100	100	100

J. Upper and Lower Limit for the Maturity Structure of Borrowing

20. These are used to reduce the Council's exposure to large fixed rate sums falling due for repayment at the same time.

Table 11:- Upper and lower limit on borrowing maturity

	2016/17 Estimate Upper %	2016/17 Estimate Lower %	2017/18 Estimate Upper %	2017/18 Estimate Lower %	2018/19 Estimate Upper %	2018/19 Estimate Lower %
< 12 months	30	0	30	0	30	0
12 months - 2 years	30	0	30	0	30	0
2 - 5 years	80	0	80	0	80	0
5 - 10years	100	0	100	0	100	0
10 years +	100	0	100	0	100	0

Table 12:- Upper limit for investments longer than 364 days

	2015/16 Actuals %	2016/17 Estimate %	2017/18 Estimate %	2018/19 Estimate %	2019/20 Estimate %
Upper limit for investments for periods longer than 364 days	25	25	Higher of £15m and 25%	Higher of £15m and 25%	Higher of £15m and 25%

21. The table above shows the upper limit for principle sums invested for periods longer than 364 days; this indicator is used to reduce the need for early sale of an investment, and is based on the availability of funds after each year end. This has been set at 25% due to the continuing uncertainty of the market and to reduce the risk posed by longer term investments.

Risk ID	Risk						Gross Risk		Current Risk		Residual Risk		Risk Mitigation
	Risk Title	Opportunity/Threat	Risk Description	Risk Cause	Consequence	Date raised	I	P	I	P	I	P	
1	Loss of capital investment due to a counterparty collapsing	T	The Council loses its principal investment or an investment becomes impaired.	Counterparty collapses or hits a financial crisis rendering it unable to repay investments.	The Council may lose money or repayment of funds could be significantly delayed which could have an adverse impact on operational funding levels	5-Aug-16	4	2	3	1	3	1	Reducing risk by limiting the use of high risk counterparties. Imposing a maximum investment value on approved counterparties in order to spread and reduce risk. Controls and procedures are in place to ensure investment and durations limits with approved counterparties are not exceeded. Counterparties are also monitored and reviewed on a weekly basis at least, or more regularly if considered necessary to do so.
35													
2	Property fund investments lose value	T	The value of the Council's units held in property fund investments decreases.	Uncertainty in the commercial property market following Brexit and slowdown in general economic activity.	Capital depreciation will decrease the overall value of the investment.	5-Aug-16	4	3	3	3	3	2	The Council receives monthly valuations from the property fund managers detailing the indicative redemption value of the individual units. These are reported to the Head of Finance on a monthly basis. The Council has the option to sell its units if there is a concern that the fund value is likely to decrease for a prolonged period.
3	Decline in interest rates	T	Interest rates continue to fall with very little prospect of upward movement in the next 12 months.	Economic growth forecasts remain subdued leading to low interest rates. Consequently lower risk counterparties tend to offer low investment rates.	The Council may not achieve its target level of interest.	5-Aug-16	2	5	1	4	1	4	In the current economic climate where rates tend to be static, arranging investments over a longer period of time where possible will allow the Council to capitalise on a higher rate of return without there being an opportunity cost. The Council continually monitors base rate and rates being achieved against budget to ensure it has secured the best value possible in a difficult economic climate.
4	Fraudulent activity	T	Potential fraud by staff	Fraudulent activity	Loss of money for the Council Disciplinary action for the staff involved	5-Aug-16	3	3	3	1	2	1	Segregation of staff duties, reviewing and monitoring of internal controls to ensure the correct protocol is being followed. Ensuring all insurance policies and the fidelity guarantee are fully up to date.

Risk ID	Risk						Gross Risk		Current Risk		Residual Risk		Risk Mitigation
	Risk Title	Opportunity/Threat	Risk Description	Risk Cause	Consequence	Date raised	I	P	I	P	I	P	
5	Money laundering	T	Money laundering by external parties	External parties pay a transaction by cash and subsequently request a refund	Fine and/or imprisonment	5-Aug-16	4	2	4	1	4	1	Ensuring the money laundering policy is reviewed and up to date. Checking refunds back to source. Raising awareness of this issue amongst staff and reviewing the financial regulations.
6	Network failure/Barclays.net being inaccessible	T	The Council is unable to carry out its daily treasury functions due to a network failure	Barclays.net is unavailable or the Council's network has failed	Daily Treasury functions will not be carried out	5-Aug-16	2	3	1	2	1	2	Invoke the business continuity plan to minimise the effects of a network issue.
7	Revenue Budgets	T	Revenue budgets are unable to meet borrowing costs of capital schemes	Revenue budgets come under pressure from restricted government funding or non delivery of programmed savings	The Council may not be able to execute some desired projects.	5-Aug-16	3	3	2	2	2	2	Revenue budgets monitored on monthly basis and future year forecasts undertaken. Reserve some capital receipts to cover borrowing costs in the short term. Monthly financial reports and forecasts.
8	Lack of suitable counterparties	T	The Council does not have enough "space" with approved counterparties to place investments/deposit surplus cash balances.	Rising cash balances and a restricted counterparty list	Use of counterparties not paying best value rates.	5-Aug-16	3	4	3	3	3	2	The Council continually monitors its approved counterparty listing in conjunction with cash balances. Any potential new investment opportunities are discussed at Treasury Management performance meetings. The Council utilises money market and enhanced cash funds to deposit surplus cash balances in the event of no space with other counterparties and also to ensure there is always cash instantly available in order to meet payment obligations when they fall due. However, there are also limits on the amounts deposited to such funds. The Council has a facility to deposit cash with the Debt Management Office should all other investment options be exhausted.

To: City Executive Board
Date: 9 February 2017
Report of: Head of Housing and Property Services and Head of Financial services
Title of Report: Sale of properties to Oxford City Housing Limited.

Summary and recommendations	
Purpose of report:	To update members on progress with the housing company, to agree the transfer of 5 properties to the company and note the initial development programme.
Key decision:	Yes
Executive Board Member:	Cllrs Mike Rowley, Housing and Ed Turner, Finance, Asset Management and Public Health.
Corporate Priority:	Meeting Housing Needs.
Policy Framework:	Housing Strategy 2015 – 2018.
Recommendations: That the City Executive Board resolves to:	
1	Note progress with the establishment of the Oxford City Housing Company.
2	Agree to the sale of the 5 properties detailed at section 3 for the sum of £730,000 subject to the conditions set out in this report and subject to the verification of the valuation prices.
3	Recommend that Council make available in 2016-17, a state aid compliant loan facility for Oxford City Housing Limited to enable the company to purchase the 5 properties identified in this report; the loan being for £742,606 which includes the purchase price and the associated costs of acquisition.
4	Recommend that Council include the provision of the loan facility mentioned above as an additional expenditure item in the 2016/17 capital programme, funded by the associated capital receipt received from the disposal.
5	Delegate authority to the Chief Executive in consultation with the Council's Chief Finance Officer and Monitoring Officer to agree the final decision on sale and amount of loan that needs to be made available to the company, should the final valuations vary from those contained in the report.

- 6 **Note** the draft development programme detailed in appendix 1 and that City Executive Board will receive further reports with regard to land sales to facilitate the delivery of that programme

Appendices	
Appendix 1	Draft development programme
Appendix 2	Risk Register
Appendix 3	Equalities impact assessment

Background

1. Oxford's housing crisis is acute with the city identified as the most unaffordable housing market in the UK. The lack of housing supply, quality and choice are a constraint on economic growth and a significant barrier to our ambition to be a world class city for everyone.
2. Changes in Government policy and the establishment of associated legislation in relation to HRA rent reductions and for local authority landlords to consider high value void sales to pay for the cost of extending the Right to Buy to Housing Association tenants, impacted very negatively on our HRA business plan investment aspirations and curtailed our ambition to build more Council housing from HRA generated resources.
3. City Executive Board (CEB) on 17 March 2016 agreed to the establishment of a Council owned housing company with the following objectives;
 - The purchase and management of the social rented units at Barton Park.
 - The development of new affordable housing with a range of tenures.
 - The purchase and management of the permitted number of high value voids that could be transferred from the Council.
 - To undertake estate regeneration schemes.

Current position

4. The housing company has now been established, with Oxford City Housing Limited (OCHL) being incorporated in June 2016, and Company Directors have been appointed. For efficiency and tax planning purposes the company is arranged as a group structure with a holding company and initially two subsidiaries, one for investment and the other for development. The opportunity to explore the introduction of additional subsidiaries e.g. maintenance of stock, has been left open for the company Board to consider as and when it is appropriate. The company is wholly owned by the Council and governance is provided by the Directors subject to the shareholder' agreement, the shareholder being represented by the members of the City Executive Board.
5. Good progress is being made with regard to;
 - The preparation for the first phase of properties at Barton Park to be purchased by the company upon completion.
 - The identification of voids for purchase

- The preparation of an initial development programme.
6. Two potential estate regeneration schemes have been identified on Blackbird Leys and Barton and are being worked on, but these are subject to detailed viability assessments and funding capacity and so as yet are not included in the company's business plan. This will be subject to further Council consideration as to the most appropriate delivery vehicle for these schemes
 7. Appendix 1 provides the detail of the initial development programme which will provide 162 new homes across a range of tenures over the next 3 years. The majority of the sites are already in Council ownership.
 8. The company is in the final stage of development of its business plan with Company Board approval expected in February 2017.

Sale of 5 properties

9. CEB has previously agreed for the sale of 5 void properties to the Council's housing company each year starting in 2016/17 as part of the Council's wider response to fund the Government's high value levy that does require local authority landlords to consider the sale of HRA assets to fund future payments. The timing and detail of the levy remains unclear and whilst some provision has been made within our business plan, this sale would provide an additional receipt. This approach also prevents them being lost from the affordable rented market. In addition last year's HRA business plan included investment in properties that had been identified suitable for either extension to provide a larger unit or had a plot suitable for additional unit(s). Following the Government policy changes this HRA programme is not now fully funded and so it is proposed that 5 properties from that intended programme are now transferred to OCHL so the works can proceed to provide much needed larger additional units.
10. The five properties that will make up the first batch of transfers are:

32 Union Street	2 bed house	£150,000
9 Pauling Road	3 bed house	£135,000
66 Sandy Lane	3 bed house	£120,000
26 Valentia Road	3 bed house	£165,000
2 Dynham Place	4 bed house	£160,000

11. The properties will be transferred on the condition that they are let at a rent not exceeding Local Housing Allowance levels in perpetuity to households nominated by the Council. Oxford City Council is under a duty to obtain the best consideration reasonably obtainable and the values of these properties has been certified as representing a fair market value by its internal valuer considering the on-going restrictions placed on their use. Verification of these valuations is being sought from an external independent valuer.

Financial implications

12. The Housing Company will be given a loan at state aid compliant rates for the purchase of the five properties detailed in paragraph 10 for the sum of £742,606 inclusive of costs which will be included in the Council's Capital Programme. In a back to back transaction the Housing Company will pay the Council a capital receipt to the same value and service the resulting debt from net income arising from the properties.

Legal issues

13. The sale of Council-owned properties to OCHL must be at market value, taking into consideration any restrictions or covenants imposed on the property. Where the purchase of the properties are to be funded by loans from the Council, the detail of such loans should be documented, and care will need to be taken that the loans to OCHL are State Aid compliant - in effect, that the loans are made at a market interest rates.

Risk

14. The risk register is attached at Appendix 2.

Equalities impact

15. The EA assessment is attached at Appendix 3.

Report author	Stephen Clarke
Job title	Head of Housing and Property Services
Service area or department	Housing and Property Services
Telephone	01865 252447
e-mail	sclarke@oxford.gov.uk

Background Papers: None

Appendix 1 – OCHL development programme

Scheme	Social Rent	Affordable Rent	Shared Ownership	Sale	Total
Year 1					
Cumberledge	6	5	0	0	11
Elsfield Hall	11	0	2	4	17
Hart's Close	0	2	0	0	2
Rose Hill	10	14	0	0	24
Year 2					
Between Towns Rd	16	10	14	0	40
Rose Hill Scout Hut	6	12	0	0	18
Underhill Circus	16	4	4	16	40
Warren Crescent	0	10	0	0	10
Total	65	57	20	20	162

This page is intentionally left blank

Appendix 2 Risk register

43

					Date Raised	Owner	Gross		Current		Residual		Comments	Controls				
Title	Risk description	Opp/ threat	Cause	Consequence			I	P	I	P	I	P		Control description	Due date	Status	Progress %	Action Owner
Properties overvalued	Housing company over estimates value of homes	Threat	Inaccurate financial appraisal of business case for transfer	Housing company viability is damaged	26/1/17	Stephen Clarke	2	2	2	2	2	1		Obtain independent valuation. Use Council data on housing management and maintenance costs for appraisal.	1/2/17	Completed	100	Alan Wylde
Properties undervalued	Council undervalues the properties in the transfer.	Threat	Insufficient market knowledge	Council receives less for the homes than it should	26/1/17	Stephen Clarke	2	2	2	2	2	1		Obtain independent valuation.	1/2/17	Completed	100	Alan Wylde
Loss of affordable housing to meet local need	Homes may be lost to affordable rent in the future	Threat	Change in ownership	Homes may not be available for local people in housing need	18/11/15	Stephen Clarke	2	1	2	1	1	1		The Council will require the homes to be used as affordable rented homes in perpetuity secured as a condition of sale or a covenant.	On sale date.	Ongoing	100	Alan Wylde

This page is intentionally left blank

Appendix 3

Housing Company - Initial Equalities Impact assessment

1. Within the aims and objectives of the policy or strategy which group (s) of people has been identified as being potentially disadvantaged by your proposals? What are the equality impacts?

No groups have been identified as being potentially disadvantaged by these proposals. The equality impacts will all be positive as the creation of a housing company will lead to the provision of further affordable housing for those who cannot access market housing and the homes will be built to the latest design standards incorporating Lifetime Homes Standard features to maximize accessibility.

The Council has considered the fact that if, subject to negotiation, the phase 1 Barton Park homes will be transferred to the company not the council, the tenants will therefore not be council tenants (and will have different rights) but it is not considered that this will give rise to any Equalities Act issues.

2. In brief, what changes are you planning to make to your current or proposed new or changed policy, strategy, procedure, project or service to minimise or eliminate the adverse equality impacts?

Please provide further details of the proposed actions, timetable for making the changes and the person(s) responsible for making the changes on the resultant action plan

No changes are being considered.

3. Please provide details of whom you will consult on the proposed changes and if you do not plan to consult, please provide the rationale behind that decision.

Please note that you are required to involve disabled people in decisions that impact on them

Not applicable.

4. Can the adverse impacts you identified during the initial screening be justified without making any adjustments to the existing or new policy, strategy, procedure, project or service?

Please set out the basis on which you justify making no adjustments

No adverse impacts identified

5. You are legally required to monitor and review the proposed changes after implementation to check they work as planned and to screen for unexpected equality impacts.

Please provide details of how you will monitor/evaluate or review your proposals and when the review will take place

No changes identified

Lead officer responsible for signing off the EqIA: Alan Wylde

Role: Housing Development and Enabling Manager

Date: 22/2/16

To: City Executive Board
Council

Date: 9 February 2017
20 February 2017

Report of: Head of Financial Services

Title of Report: Medium Term Financial Strategy 2017-18 to 2020-21
and 2017-18 Budget

Summary and recommendations	
Purpose of report:	To present the outcome of the budget consultation and agree the Council's Medium Term Financial Strategy for 2017-21 and 2017-18 Budget for recommendation to Council
Key decision:	Yes
Executive Board Member:	Cllr Ed Turner, Finance, Asset Management and Public Health
Corporate Priority:	All Corporate Plan priorities
Policy Framework:	Budget
Recommendations: That the City Executive Board resolves to:	
1	Agree the amendments to the Consultation Budget, in light of the outcomes of the public consultation.
2.	Recommend that Council approve the 2017-18 General Fund and Housing Revenue Account budgets and the General Fund and Housing Revenue Account Medium Term Financial Plan as set out in Appendices 1-10, noting: <ul style="list-style-type: none"> a) the Council's General Fund Budget Requirement of £21.055 million for 2017/18 and an increase in the Band D Council Tax of 1.99% or £5.67 per annum representing a Band D Council Tax of £290.19 per annum b) the Housing Revenue Account budget for 2017/18 of £44.285 million and a reduction of 1% (£1.06/wk) in social dwelling rents from April 2017 giving a revised weekly average social rent of £105.65 as set out in Appendix 4 c) the General Fund and Housing Revenue Account Capital Programme as shown in Appendix 6.

3. **Recommend that Council** agree not to implement the voluntary 'Pay to Stay' policy for Council house tenants (para 28 refers)
4. **Recommend that Council** agree the fees and charges shown in Appendix 7
5. **Recommend that Council** delegate authority to the Section 151 Officer in consultation with the Board Member for Finance and Assets the decision to determine whether it is financially advantageous for the Council to enter into a Business Rates Distribution Agreement as referred to in paragraphs 16-17 below.
6. **Recommend that Council** agree an additional loan of up to £75k for working capital to Oxwed as highlighted in paragraph 41
7. **Recommend that Council** agree provision of a loan facility to Oxford City Housing Ltd of up to £61 million (paras 39-40) an extra £48.75 million over the next four years, subject to the provision of; and agreement to a business plan by the Company.

Appendices	
Appendix 1	Summary of General Fund Budget by Service 2017-18 to 2020-21
Appendix 2	General Fund Revenue Budget by Service 2017-18 to 2020-21
Appendix 3	Detailed General Fund Service Budgets Bids and Savings Proposals 2017-18 to 2020-21
Appendix 4	Housing Revenue Account Budget 2017-18 to 2020-21
Appendix 5	Housing Revenue Account Rent by property type
Appendix 6	General Fund and HRA Capital Programme 2017-18 to 2020-21
Appendix 7	Fees and Charges
Appendix 8	Risk Register
Appendix 9	Equalities Impact Assessment
Appendix 10	Budget Consultation

Comment from Cllr Ed Turner the portfolio holder for Finance, Asset Management and Public Health,

Since the publication of our consultation budget, we have received a final settlement from the government, confirming the ending of Revenue Support Grant by 2019/20. We have also become aware of two additional pressures – a reduction in funding from business rates going forward as part of a “fairer funding” process, and some significant reductions to the level of New Homes Bonus we will receive.

Nonetheless, the proposals in this budget retain our ambition **not to cut any frontline services over the next four years**. In doing so, we are proud of our workforce, who have continued to innovate, put forward proposals to make our services more efficient, and at the same time deliver excellent support to local people. We make no apology for noting the comparison with our upper tier authority, which, at the same time as it seeks to expand its remit, presides over atrocious levels of educational attainment in its primary schools, is slashing support for homeless hostels, and is seriously reducing much-valued local services such as children’s centres. We believe part of the reason for this is that we have not entered into large-scale privatisation contracts with outsourcing companies, and instead invested in our own workforce, and encouraging it to see its services more widely in the local area.

A major priority in this budget is *housing*. Oxford’s housing crisis gets ever more acute, with average house prices now topping £350,000, and therefore becoming unaffordable to those on middle as well as lower incomes. It includes £10 million in capital to invest in homes for homeless families, £1.3 million to build new council bungalows, and loans of up to £61 million for our new local housing company, which we expect to be at the forefront of delivering new housing, especially social rented housing, starting with the new development at Barton.

We are also investing in our communities – there is over £4 million of funding for community centres in this budget, and we are proposing **retaining in full** our homelessness prevention budget and our funding for the third sector, in areas like advice services and the arts. We propose new, one-off funding to support “stay and play” sessions, in the hope these will become sustainable thereafter. We have reinstated capital support for cycling schemes, aware of the benefits to local people and the wider community of having improved cycling infrastructure, and in the interests of improving air quality have earmarked match funding for a bid to support the introduction of electric taxi infrastructure in Oxford.

Our aim over the next four years is to continue to practice sound financial management, work in partnership with council staff to safeguard and improve frontline services, especially the most vulnerable, and take strong action to tackle Oxford’s housing crisis, avoid compulsory redundancies. We believe this budget will assist us in meeting those objectives.

Introduction

1. This report reflects the outcome of the consultation on the draft budget agreed by the City Executive Board at its meeting on 17th December 2016 as well as changes which have arisen since the consultation budget was published.
2. The consultation on the draft budget began on 18th December 2016 and ended on 31st January 2017. The consultation document was available on the Council's website Paper copies were also available at the Town Hall.
3. For ease of reading; the report is split into three sections:
 - Section A General Fund Revenue Budget
 - Section B Housing Revenue Account (HRA) Budget
 - Section C Capital Programme

Section A – General Fund Revenue Budget

4. Since the publication of the Consultation Budget a number of key issues have arisen which affect the budget, these are summarised below:

Provisional Local Government Finance Settlement 2017-18

5. The Government published its Provisional Finance Settlement for 2017/18 on 17 December 2016, together with indicative figures for 2018-19 and 2019-20. These were subject to consultation which closed on 13 January.
 - The key points include:
 - Upper tier authorities being able to increase the Social Care Precept by up to 3% per annum in 2017/18 and 2018/19. However, authorities that do so will not be able to make a further increase in 2019/20 (i.e. the total allowable increase over the three-year period is 6%).
 - upper tier authorities wishing to raise their council tax by 5% or more (i.e. 2% referendum threshold and 3% social care precept) will need to hold a referendum. For district councils, increases of less than 2% or up to and including £5 (whichever is higher) above the authority's relevant basic amount of council tax for 2016/17 can be made without triggering a referendum.
 - The 2017/18 New Homes Bonus allocations and details of the consultation on the future of the scheme have been announced (previously these figures were only indicative). The number of years that the scheme will be based upon (currently 6 years' in 2016/17) will reduce to 5 years in 2017/18 and 4 years from 2018/19 onwards. The scheme will now also only reward growth in homes above 0.4% per annum.
 - The changes to the New Homes Bonus Scheme have allowed the government to remove £241m of funding from the scheme. This funding has been diverted to the new Adult Social Care Support Grant and will be distributed based on the adult social care relative needs formula and is for 2017/18 only.
 - 97% of authorities accepted the government's four-year fixed settlement offer. In response to a question in Parliament, the Minister said that those authorities not accepting the offer would therefore still be subject to an annual settlement.

- Within the business rates retention system the National Non-Domestic Rates (NNDR) baseline and top up/tariff amounts have been amended to reflect Revaluation 2017. The adjusted amounts are intended to make changes in Rateable Value revenue neutral for individual authorities; with changes to authorities' NNDR Baseline (and therefore tariff/top up) being equal and opposite to the forecast change in the ability to raise business rates locally.

Settlement Funding Assessment (SFA)

6. The Settlement Funding Assessment comprises authorities Revenue Support Grant (RSG) and their share of locally retained business rates (the baseline funding level). The figures for Oxford City Council are as follows:

	2017/18	2018/19	2019/20	2020/21 *
	£000's	£000's	£000's	£000's
Total SFA	7,304	6,664	5,954	6,375
of which				
Revenue Support Grant	1,458	630	-	-
Baseline Funding Level	5,846	6,034	6,249	6,375
Tariff adjustment *	-	-	(295)	-
Reduced/ (Increased) SFA on previous year	14.3	8.8	10.7	(7.07)

* Where baseline need is less than the Settlement Funding Assessment a reduction is made to funding. For authorities not in receipt of RSG the reduction is made to baseline funding. It is not certain whether this adjustment will continue going forward.

Council Tax Freeze Grant for 2017/18 and Impact of Referendum Level

7. As last year there is no Council Tax Freeze Grant on offer for 2017-18.
8. The referendum level for 2017/18 has been confirmed as 2% or above for district authorities. The City Council's recommended Council Tax increase of 1.99% provides the optimum level of financial benefit without the expense of seeking a referendum. Council Tax rises from 2018/19 onwards have been assumed as 1.99% per annum, to reflect the average amount assumed by the Government over the next 4 years in calculating the authorities Revenue Support Grant.

Revenue Support Grant

9. The methodology for the calculation of Revenue Support Grant incorporates projections of future council tax increases and growth in individual authorities' Council Tax Bases.
10. Government grant for Homeless Prevention (£939k for 2015/16) and the 2011 Council Tax Freeze Grant (£306k for 2015/16) are now subsumed into RSG and Business Rates. The element previously paid through RSG (£542k and £178k respectively), will taper away, disappearing entirely in 2019/20.

11. The changes to the Consultation Budget as a result of the Provisional Settlement are included in Table 2 below:

Table 2 Change In Revenue Support Grant since Consultation Budget				
	2017/18	2018/19	2019/20	2020/21
		Est	Est	Est
	£000's	£000's	£000's	£000's
Consultation Budget	1,515	630	0	0
Provisional Settlement Figures	1,460	630	0	0
(Decrease)/ Increase	(55)	0	0	0

12. Compared to the MTFs there is an adverse variance of £55k over the four year period. Additionally, the Government's methodology for calculating RSG results in a negative settlement of £295k in 2019/20 (so we are, in effect, in a position of "negative grant"). A technical adjustment has been made to the Council's Business Rate Tariff to reduce the Council's Business Rates income by an equivalent amount.

Retained Business Rates

13. The Government has issued authorities with their Retained Business Rates Baseline Funding Levels for 2017-18 to 2019-20. The actual amount of Retained Business Rates depends on a number of factors including the estimated amount of business rates income net of appeals and write offs, the tariff payable to the Government and the levy paid on additional income above the Baseline, currently 50% for Oxford.

14. Almost certainly the Baseline Funding Level will not be the amount the authority eventually receives in Retained Business Rates. A summary of the changes is given below but it should be noted that there can be substantial volatility around these figures:

Table 3 Change In Business Rates since Consultation Budget				
	2017/18	2018/19	2019/20	2020/21
	Est	Est	Est	Est
	£000's	£000's	£000's	£000's
Consultation Budget	6,817	8,243	8,136	8,145
Provisional Finance Settlement	6,647	8,085	8,005	8,009
(Decrease)/ Increase	(170)	(158)	(133)	(135)
Tariff	28,600	29,520	30,570	31,181
Tariff adjustment (negative RSG)	0	0	(295)	-

Safety net threshold (92.5% baseline)	5,411	5,578	5,781	5,897
--	-------	-------	-------	-------

15. Unlike Revenue Support Grant there is no four year offer from the Government for Tariffs. From 1/4/2020 there will be a re-basing of all the figures when the Government introduces 100% business rate retention. This will be coupled with new burdens on local Government but it is unclear as yet what these will be. It is possible that this re-basing will take place in 2019 and additionally it is important to note that it is likely that any baseline will take account of the increased income from Westgate, all of which make the calculation of future retained business rates uncertain.

Business Rates Distribution Group

16. The chief financial officers of the Oxfordshire councils have agreed that it would be sensible for the Pool's membership to be set to maximise its income for the good of Oxfordshire. They have also agreed that councils who would benefit from being in a pool (because the levy on business rates growth would be less than if they were outside the Pool) should not be excluded from sharing in the additional income generated by the Pool just because in any year their membership would not generate the optimum retained income for the Pool. It should be noted that whilst authorities would share in the benefits they would also take on some of the risk of Pool losses not covered by the safety net.

17. It is recommended that the decision to join the Business Rates Distribution Group is delegated to the Section 151 Officer in consultation with the Executive Member for Finance, Asset Management and Public Health once business rates estimates for 2017-18 are known for all Districts within Oxfordshire.

18. The summary effect of the Provisional Finance Settlement compared to the Consultation Budget is shown in Table 4 below:

Table 4 Change In External Funding since Consultation Budget				
	2017/18	2018/19	2019/20	2020/21
	£000's	£000's	£000's	£000's
Reduction in Revenue Support Grant	55	0	0	0
Reduction in Business Rates	170	158	133	135
Net Variation	225	158	133	135

New Homes Bonus

19. New Homes Bonus (NHB) is currently paid each year for 6 years. It is based on the amount of additional Council Tax revenue raised for new-build homes, conversions and long-term empty homes brought back into use. There is also an extra payment for providing affordable homes. A consultation on NHB ended in March 2016 and on 17

December 2016 local authorities were issued with their provisional allocations for 2017-18.

20. The amounts for Oxford City compared to the assumptions in the MTFs are shown in Table 5 below:

Table 5 : New Homes Bonus Estimates				
New Homes Bonus	2017/18	2018/19	2019/20	2020/21
	£000's	£000's	£000's	£000's
Consultation Budget	1,338	1,671	1,784	1,835
Provisional Finance Settlement	1,981	1,749	1,624	1,428
(Increase)/ Decrease	(643)	(78)	160	407

21. The outcome of the consultation on NHB is that:

- Funding is reduced by £241m in 2017/18 (funding remains at pre-announced levels for 2018/19 and 2019/20).
- Funding will be reduced from 6 years to 5 years in 2017/18
- Funding will then reduce to 4 years From 2018/19, the government will consider withholding payments from local authorities that are not *“planning effectively, by making positive decisions on planning applications and delivering housing growth”*.
 - A consultation is planned regarding withholding payments for homes that are built following an appeal
 - From 2017/18 only growth above 0.4% will attract payments (and these will be made as before, based on Band D equivalents, the national average council tax and a fixed amount for social housing).

22. The 2018/19 and 2019/20 allocations within DCLG's Core Spending Power are only indicative. These are based upon authorities' share of the 2017/18 overall allocation. There could, therefore, be significant variances between these amounts and the actual allocations. The Council uses NHB to fund Capital; as it is one off expenditure and so de-risks the MTFs. In the event of further reductions in NHB the Council's Capital Programme could be reduced or alternatively schemes funded by prudential borrowing.

Other Changes Arising

23. A summary of other changes to the Consultation Budget outside of the Finance Settlement are shown in Table 6.

Table 6 Summary of Other Issues				
	2017/18	2018/19	2019/20	2020/21
	£000's	£000's	£000's	£000's

HR and Organisational Development FSR(1)	(80)	(80)	(80)	(80)
Procurement FSR (2)	(41)	(42)	(23)	(23)
Minimum Revenue Provision (3)	0	53	138	151
Development of sports facilities(4)	0	20	20	20
Go Ultra Low - taxis	18	-	-	-
Small cycle schemes	25	25	-	-
Design costs Cowley Marsh pavilion	25	-	-	-
Voluntary sector grants	43	-	-	-
Direct Revenue Funding (5)	35	163	(180)	(445)
Total	25	139	(125)	(377)

Notes

- (1) **HR and OD** – Following the Fundamental Service Review a restructure of the HR and OD team will result in further efficiency savings
- (2) **Procurement** – Following the Fundamental Service Review and scrutiny of service expenditure further procurement savings have been identified
- (3) **MRP** – Revenue charge arising from additional prudential borrowing for purchase of properties for the homeless
- (4) **New revenue streams** – Ongoing discussions around sports development indicate that income targets are overly ambitious
- (5) **Voluntary sector grants** – £50k one off contribution to ‘stay and play’ sessions at children’s centre net of other minor adjustments
- (6) **Direct Revenue Funding** – DRF provides funding to finance capital expenditure. The amount used equates to the amount of New Homes Bonus received and the changes shown in Table 6 reflect the changes in New Homes Bonus.

Summary of Changes to Medium Term Financial Strategy

24. The Council’s General Fund Medium Term Financial Strategy is shown in Appendices 1-3 together with assumptions around fees and charges in Appendix 7. A summary of the movement in the Medium Term Financial Strategy from the Consultation Budget agreed in December 2016, taking account of the changes highlighted above is shown below:

	2017/18	2018/19	2019/20	2020/21
	£000’s	£000’s	£000’s	£000’s

Net Expenditure per Consultation Budget	21,281	22,212	21,877	22,298
New Homes Bonus per table 5	(643)	(78)	160	407
Summary of other changes per table 6	25	139	(125)	(377)
Additional transfer to/(from) working balances	392	(219)	(167)	(165)
Net Budget Requirement	21,055	22,054	21,745	22,163
FUNDING **				
Council Tax	(12,949)	(13,339)	(13,740)	(14,154)
Revenue Support Grant	(1,460)	(630)	0	0
Retained Business Rates	(6,646)	(8,085)	(8,005)	(8,009)
Total	(21,055)	(22,054)	(21,745)	(22,163)
Surplus/ (Deficit)	0	0	0	0

GENERAL FUND WORKING BALANCE				
Opening	3,621	4,013	4,554	4,260
Transferred to/(from)	392	541	(294)	(800)
Closing	4,013	4,554	4,260	3,460

** Incorporates revised funding shown In Table 4

Budget Consultation Results

25. The consultation concentrated on a number of key areas which are shown below. Forty seven responses were received. The results are shown in Appendix 10 with a summary shown below for each of the main areas:

- Approach to Budget Setting**
 85% of respondents strongly agreed or agreed with the Council's approach to budget setting, which focuses Council spending on maintaining high quality frontline services, avoiding compulsory redundancies and increasing efficiency.
- Capital Investment**
 Most respondents agreed with the major capital investments undertaken by the Council. The schemes with the most support were investing in council housing followed by the new waste recycling facility and the purchase of homes for housing homeless families.
- Revenue Investment**
 There was strong support to 'continue to pay staff at least the Oxford Living Wage' maintaining support to homeless families and apprentices. There was neutrality around increasing resources in planning services.
- Fees and Charges**

Respondents were in agreement to all increases in fees and charges with most popular being increases in garage rents and garden waste collection.

- **Council Tax**
There was a 50/50 response between increasing and freezing council tax
- **Council Tax Support Scheme**
70% of respondents agreed that the Council should maintain the same Council Tax Support Scheme introduced in April 2013.
- **Housing Revenue Account**
In terms of prioritising the HRA Capital Programme the respondents agreed that building and acquiring new homes was the top priority followed by maintaining the quality of existing homes, although 98% of respondents were not council tenants

The feedback has been considered as part of the budget process and will also be shared with senior managers as appropriate.

Risk Implications

26. The main risks to the balanced position of the General Fund Consultation Budget (Appendix 8) are that:

- Significant variations in actual income and expenditure against budget occur
- Business Rates income is lower than forecast
- New Homes Bonus is lower in future years
- Welfare Reform impacts the authority more adversely than assumed
- Interest rates are lower than projected
- Slippage, non-delivery of savings or additional pressures arise that have an on-going financial impact on the Council
- The knock on implications of funding cuts being experienced by partner organisations

Section B Housing Revenue Account Budget

Issues arising since the publication of the consultation budget

27. The Council published its Consultation Budget on 18th December 2016 including the Housing Revenue Account Budget. The budget for the Housing Revenue Account is as detailed in Appendices 4. Appendix 5 shows the effect of the 1% reduction on council house rents in the city.

28. In December the Government announced the abandonment of the compulsory 'Pay to Stay' policy for Councils in England which was due for implementation from 1/4/2017. Housing Associations and local authorities would still have local discretion to implement.

29. The Government also advised that the pilot of Right to Buy for Housing Association tenants would be extended on a regional basis, using government funding. As a result the requirement for councils to pay a "levy" to government based upon sale receipts from the disposal of "high value" council houses which become empty will not be implemented in 2017-18.

30. Due to the deferment of the High Value Council Housing Levy, the contingency previously set aside from HRA surpluses is not required in the short term and was transferred to an earmarked reserve in the Consultation Budget. It is proposed to use this reserve to fund the items detailed below leaving a balance of £2.775 million in the reserve: £300k per year for 2 years to enhance the planned maintenance of our own stock to deal with a backlog of communal area planned maintenance work which is outside the scope of our current more mainstream programmes of doors, windows, roofs etc.

31. HCA have announced we have been successful in our bid for £350k to help fund the development of 8 bungalows at Bracegirdle and Salford Rd. These sites were earmarked for development by our housing company. However, we cannot use this grant within the Housing Company so it is proposed to develop these sites out within the HRA at social rent and make budget provision of £1.325m to do so.

Housing Revenue Account Budget 2017/18 to 2020/21

32. Appendix 4 details the HRA Budget for the period 2017/18 to 2020/21 which is summarised below for the next four year period:

Table 8 Housing Revenue Account 2017-18 to 2020-21

-	<u>2017/18</u> £m	<u>2018/19</u> £m	<u>2019/20</u> £m	<u>2020/21</u> £m
<u>Income</u>				
Total Income	(44,285)	(43,310)	(43,575)	(44,180)
<u>Expenditure</u>				
Total Expenditure	35,967	36,112	35,854	37,195
Net Operating Expenditure	(8,318)	(7,198)	(7,721)	(6,985)
Transfer (to)/from Major Repairs/Other Reserves	2,775			
Revenue Contributions towards Capital	0	9,363	9,549	8,825
(Surplus)/Deficit for the Year	(5,543)	2,165	1,828	1,840
(Surplus)/Deficit b/fwd	(5,537)	(11,156)	(9,050)	(7,281)
Investment Income	(76)	(59)	(59)	(61)
(Surplus)/Deficit c/fwd	(11,156)	(9,050)	(7,281)	(5,502)

Risk Implications

33. The main risks to the balanced position of HRA are summarised below and detailed in Appendix 8:

- Liability arising from forced sale of High Value Council Housing (HVCH) is more than estimated for future years
- Rent increase in year four is insufficient to sustain the HRA BP over the 30 year trajectory.
- Increased arrears due to benefit changes arising from the roll out of universal credit
- Non-achievement of assumed Right to Buy sales now required to fund the increased capital spend commitments.
- Non-achievement of planned efficiencies.
- Variations in estimates causing cash flow problems

Section C Capital Programme

34. The Council's Draft Capital Programme for consultation amounted to over £132 million over the four year period 2017/18 to 2020/21.

35. Appendix 6 attached details the Council's Capital Programme for 2017/18 to 2020/21. The changes to the Consultation Budget reported in December 2016 are summarised in Table 9 below.

Table 9 Changes to Capital Programme 2017/18 to 2020/21 compared to Consultation Budget				
	2017/18	2018/19	2019/20	2020/21
	£000's	£000's	£000's	£000's
GENERAL FUND				
Consultation Budget Spend	40,859	42,980	22,153	16,530
Additional changes to Schemes				
Donnington Recreation Ground	45			
Barton Phase 1 (1)		8,440	2,455	-
Barton Phase 2 (2)				10,329
Changes in loans to Housing Company (3)	-	(1,000)	1,000	1,000
Go Ultra Low – Taxis (4)	35	35	35	0
Teachers Loans (5)	-	100	-	-
Solar bins	-	-	(5)	-
Car park resurfacing (6)	-	(50)	(50)	(38)
Total General Fund	40,939	50,505	25,588	27,821
HRA				
Consultation Budget Spend	19,900	17,858	17,946	17,058
Additional Schemes				
Development at Bracegirdle and Salford Road	1,325			

Total HRA	21,225	17,858	17,946	17,058
Total Revised Programme	62,164	68,363	43,534	44,879

Notes to Table 9 :

- (1) **Barton Phase 1**- This represents the first 95 properties which the Council has committed to purchase from the developers, Hills. To secure the most tax advantageous position the HRA will purchase the properties and then sell them on to the Housing Company who will let them at social rent.
- (2) **Barton Phase 2** – This represents the remaining 259 properties which the Council has committed to purchase. In a similar transaction these will be sold to the Housing Company and subsequently let at social rent
- (3) **Changes in loans to Housing Company** – Changes in expenditure within the Housing Company Business Plan
- (4) **Go Low Ultra Low** – The Council will bid for around £543k of Government funding from OLEV in return for making a capital contribution of £105k over 3 years together with £18k revenue and securing around £76k from external partners to fund charging infrastructure for low emission targets
- (5) **Teachers Loans** – Scheme is running in conjunction with Catalyst housing. Five loans have been paid out and committed. An additional £100k would be sufficient for 2 further loans.
- (6) **Car Park Resurfacing** – Minor changes to the car park resurfacing budget

Funding of the Capital Programme

36. The funding of the Capital Programme is shown in Table 10 below

Table 10 Capital Programme 2017/18 to 2020/21				
	2017/18	2018/19	2019/20	2020/21
	£000's	£000's	£000's	£000's
GENERAL FUND				
Capital Receipts	9,089	11,357	5,780	11,145
Revenue Funding	9,446	2,028	350	2,771
Section 106	326	200	0	0
Community Infrastructure Levy	2,247	380	750	200
Grants	2,011	2,501	1,000	1,000
Borrowing	17,420	34,039	17,708	12,705
Museum Trust Funding	400	0	0	0
TOTAL GENERAL FUND	40,939	50,505	25,588	27,821
HRA				
Major Repairs Reserve	19,491	6,161	6,243	6,327
Capital Receipts	1,734	2,049	2,397	2,684
Revenue Funding	-	9,648	9,306	8,047
TOTAL HRA	21,225	17,858	17,946	17,058

TOTAL FUNDING	62,164	68,363	43,534	44,879
----------------------	---------------	---------------	---------------	---------------

37. The main risks to the Capital Programme are set out in Appendix 8 and summarised below:

- Disposals as detailed before are not secured causing a shortfall in funding of schemes
- Estimate for payment to Government in respect of high value Council homes is insufficient
- Slippage in Capital Programme and impact on delivery of priorities
- Robustness of estimates

Housing Company

38. In March 2016 the Council approved the establishment of a Local Authority housing company and the company was incorporated in June 2016.

39. The Council will lend money to the Housing Company at state aid compliant rates of interest using its prudential borrowing powers with the company repaying the Council either based on an annuity or overdraft method. The Council gave approval at its meeting in April 2016 for loans to be made to the Housing Company for the acquisition of houses at Barton Park in 2017-18 (£12.250 million) together with working capital (£250k). The Companies Business Plan will be presented to a shareholders meeting in due course for consideration prior to formal approval of the further loans which are anticipated to be required

40. Over the next 4 years loans from the Council are in the region of £61million (£12.250 million having already been agreed), facilitating the construction and acquisition of approximately 536 new dwellings. In addition to capital receipts, loan repayments will be made by the company back to the Council.

Oxford West End Development (OXWED)

41. The Council has a 50/50 partnership with Nuffield College to undertake the development of the land at Oxpens. The Council has already approved loans totaling £4.1 million as its 50% share of the cost of purchasing additional land in December 2017. In addition, loans have also been approved to fund working capital of £100k. However, the Company's projected cash flow requires a further advance of up to £75k to take it up to March 2018. Nuffield College will be matching this amount.

Oxford Direct Services

42. At the City Executive Board in March 2017 members will be asked to consider a business case for the establishment of wholly owned company for the operation of services currently undertaken within Direct Services. Detailed work is currently underway to determine the financial implications for both the City Council and the Company and will be reported to members in due course.

Financial Implications

43. These are covered within the main body of the report

Legal Implications

44. The Council is required to set a balanced budget and agree the Council Tax and housing rents before the beginning of the financial year.

Risk Implications

45. These are shown in Appendix 8 of the report and highlighted within the body of the report

Equalities Impact Assessment

46. A copy of the Equalities Impact Assessment is given in Appendix 9 attached to this report.

Name and contact details of author:-

Name : Nigel Kennedy

Job title : Head of Financial Services

Service Area / Department : Finance

Tel: 01865 252708 e-mail: nkennedy@oxford.gov.uk

List of background papers: None

Oxford City Council's General Fund Revenue Budget 2017/18 for Consultation and Future Year Control Totals

	Recommended Budget 2017/18		Proposed Budget 2018/19		Proposed Budget 2019/20		Proposed Budget 2020/21	
	£000's	% of Total	£000's	% of Total	£000's	% of Total	£000's	% of Total
Chief Executive	220	1%	220	1%	220	1%	220	1%
Assistant Chief Executive	220	1%	220	1%	220	1%	220	1%
Assistant Chief Exec	174	1%	174	1%	174	1%	174	1%
Communications	(0)	(%)	(0)	(%)	(0)	(%)	(0)	(%)
Policy & Partnerships	46	%	46	%	46	%	46	%
Regeneration & Housing	(1,194)	(6%)	(1,290)	(6%)	(1,233)	(6%)	(1,288)	(7%)
Partnership Team	502	2%	552	3%	545	3%	538	3%
Partnership Team	502	2%	552	3%	545	3%	538	3%
Planning & Regulatory	2,787	13%	2,724	14%	2,699	14%	2,699	14%
Cultural Development	0	%	0	%	0	%	0	%
Development	344	2%	292	1%	292	1%	292	1%
Support Services	236	1%	236	1%	236	1%	236	1%
Information Services	(6)	(%)	(6)	(%)	(6)	(%)	(6)	(%)
Spatial Development	1,163	5%	1,163	6%	1,138	6%	1,138	6%
Environmental Health	1,049	5%	1,038	5%	1,038	5%	1,038	5%
Housing & Property	(4,483)	(21%)	(4,566)	(23%)	(4,477)	(23%)	(4,525)	(23%)
Community Housing & Strategy	758	4%	758	4%	758	4%	758	4%
Housing Needs	3,715	17%	3,626	18%	3,640	18%	3,632	18%
Property Services	(235)	(1%)	(210)	(1%)	(205)	(1%)	(205)	(1%)
Commercial Property	(9,186)	(43%)	(9,205)	(46%)	(9,135)	(46%)	(9,175)	(47%)
Office Accommodation	132	1%	132	1%	132	1%	132	1%
Property Support Services	332	2%	332	2%	332	2%	332	2%
Organisational Development & Corporate Services	4,796	23%	4,633	23%	4,425	22%	4,549	23%
Business Improvement	682	3%	437	2%	204	1%	257	1%
Transformation Projects	227	1%	227	1%	227	1%	227	1%
Business Improvement & Performance	216	1%	146	1%	92	%	92	%
Technology	17	%	(49)	(%)	(64)	(%)	(12)	(%)
Customer Services	0	%	(100)	(%)	(253)	(1%)	(253)	(1%)
Human Resources & Organisational	222	1%	212	1%	202	1%	202	1%
Welfare Reform Team	226	1%	226	1%	226	1%	226	1%
Welfare Reform	226	1%	226	1%	226	1%	226	1%
Financial Services	3,450	16%	3,533	18%	3,557	18%	3,628	18%
Accountancy	0	%	0	%	0	%	0	%
Corporate Finance	6	%	6	%	6	%	6	%
Investigations	215	1%	215	1%	215	1%	215	1%
Procurement & Payments	54	%	4	%	4	%	4	%
Revenues & Benefits	3,206	15%	3,339	17%	3,363	17%	3,434	17%
Incomes	(30)	(%)	(30)	(%)	(30)	(%)	(30)	(%)
Law & Governance	438	2%	438	2%	438	2%	438	2%
Committees & Members Services	0	%	0	%	0	%	0	%
Election Services	436	2%	436	2%	436	2%	436	2%
Legal Services	0	%	0	%	0	%	0	%
Executive Support	2	%	2	%	2	%	2	%
Community Services	17,493	82%	16,443	82%	16,376	83%	16,241	82%
Community Services	7,783	37%	7,686	38%	7,656	39%	7,656	39%
Leisure Management	1,721	8%	1,689	8%	1,689	9%	1,689	9%
Oxford Sport & Physical Activity	98	%	98	%	98	%	98	%
Sports Development	202	1%	202	1%	202	1%	202	1%
Parks Development	787	4%	787	4%	787	4%	787	4%
Community Centres	851	4%	829	4%	829	4%	829	4%
Youth Ambition	444	2%	444	2%	444	2%	444	2%
Town Hall & Facilities	194	1%	188	1%	188	1%	188	1%
Culture	555	3%	560	3%	530	3%	530	3%
Community Safety	1,099	5%	1,099	5%	1,099	6%	1,099	6%
Localities Team	1,832	9%	1,790	9%	1,790	9%	1,790	9%
Direct Services	8,827	41%	7,908	40%	7,896	40%	7,761	39%
Building Planned Operations	(2,585)	(12%)	(2,700)	(13%)	(2,815)	(14%)	(2,930)	(15%)
Building - Responsive Operations	496	2%	496	2%	496	3%	496	3%
Off Street Parking	(2,714)	(13%)	(3,179)	(16%)	(3,219)	(16%)	(3,374)	(17%)
Waste & Recycling Domestic	4,311	20%	3,980	20%	3,969	20%	3,958	20%
Waste & Recycling Commercial	(1,143)	(5%)	(1,188)	(6%)	(1,198)	(6%)	(1,198)	(6%)
Engineering	(661)	(3%)	(653)	(3%)	(645)	(3%)	(632)	(3%)
Street Scenes	4,261	20%	4,263	21%	4,273	22%	4,275	22%
Motor Transport	(289)	(1%)	(253)	(1%)	(220)	(1%)	(177)	(1%)
Caretaking & Miscellaneous	(123)	(1%)	(123)	(1%)	(123)	(1%)	(123)	(1%)
Local Overheads	3,612	17%	3,625	18%	3,650	18%	3,650	19%
Direct Building Services Stores	829	4%	837	4%	920	5%	1,003	5%
Pest Control & Dog Wardens	86	%	76	%	76	%	76	%
Parks - DS	2,747	14%	2,727	14%	2,732	14%	2,737	14%

Oxford City Council's General Fund Revenue Budget 2017/18 for Consultation and Future Year Control Totals								
	Recommended Budget 2017/18		Proposed Budget 2018/19		Proposed Budget 2019/20		Proposed Budget 2020/21	
	£000's	% of Total	£000's	% of Total	£000's	% of Total	£000's	% of Total
Environmental Sustainability	882	4%	849	4%	824	4%	824	4%
Environmental Quality	318	1%	318	2%	318	2%	318	2%
Energy & Natural Resources	321	2%	321	2%	321	2%	321	2%
Smart, Sustainable Cities	244	1%	211	1%	186	1%	186	1%
Total Portfolio Budget	21,314	100%	20,006	100%	19,787	100%	19,721	100%
Below the line								
Corporate Accounts	(794)	(4%)	1,236	6%	1,952	10%	2,901	15%
Contingencies	145	1%	271	1%	300	2%	341	2%
Net Expenditure Budget	20,665	97%	21,512	108%	22,039	111%	22,963	116%
General Fund Working Balances								
Transfer to / (from) General Fund Working Balances	391	2%	542	3%	(294)	(1%)	(800)	(4%)
Net Budget Requirement	21,056	99%	22,054	110%	21,745	110%	22,163	112%
Financed by	(21,056)	(99%)	(22,054)	(110%)	(21,745)	(110%)	(22,163)	(112%)
Revenue Support Grant	(1,460)	(7%)	(630)	(3%)	0	%	0	%
Business Rates retention	(6,647)	(31%)	(8,085)	(40%)	(8,005)	(40%)	(8,010)	(41%)
Section 31 Grants	0	%	0	%	0	%	0	%
Council tax	(13,121)	(62%)	(13,511)	(68%)	(13,912)	(70%)	(14,326)	(73%)
Less Parish Precept	172	1%	172	1%	172	1%	172	1%
Collection Fund Surplus	0	%	0	%	0	%	0	%
Business Rates Collection Fund (Surplus) / Deficit	0	%	0	%	0	%	0	%
Over / (Under) Allocated budget	0	%	0	%	0	%	0	%

Oxford City Council's Revenue Budget at Portfolio Level 2017-18

Appendix 2

	Approved Budget 2016/17	MTFP assumptions	Fundamental Service Review	Contractua l Inflation	Pressures	Efficienc y Savin g	Invest to Save	Fees & Charges	Service Reductions	New Investment	Recommended Budget 2017/18
	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's
Chief Executive	178	50	0	0	0	(8)	0	0	0	0	220
Assistant Chief Executive	178	50	0	0	0	(8)	0	0	0	0	220
Assistant Chief Exec	119	63				(8)					174
Communications	15	(15)									(0)
Policy & Partnerships	45	1									46
Regeneration & Housing	(1,450)	274	(117)	0	1,021	0	0	(305)	(9)	(608)	(1,194)
Partnership Team	537	12	0	0	35	0	0	0	(9)	(73)	502
Partnership Team	537	12			35				(9)	(73)	502
Planning & Regulatory	3,108	(2)	0	0	226	0	0	(10)	0	(535)	2,787
Cultural Development	0										0
Development	102	213			39			(10)			344
Support Services	462	(225)									236
Information Services	(77)	71									(6)
Spatial Development	1,697	2								(535)	1,163
Environmental Health	925	(63)			187						1,049
Housing & Property	(5,096)	264	(117)	0	760	0	0	(295)	0	0	(4,483)
Community Housing & Strategy	706	52									758
Housing Needs	3,755	77	(117)								3,715
Property Services	(555)	(375)			760			(65)			(235)
Commercial Property	(9,368)	412						(230)			(9,186)
Office Accommodation	4	128									132
Property Support Services	362	(29)									332
Organisational Development & Corporate Services	5,116	(293)	(80)	5	388	(143)	0	(15)	(150)	(32)	4,796
Business Improvement	913	(106)	(80)	5	190	(86)	0	(5)	(150)	0	682
Transformation Projects	340	37							(150)		227
Business Improvement & Performance	291	(66)									216
Technology	39	34		5	15	(76)					17
Customer Services	(14)	14									0
Human Resources & Organisational Development	257	(124)	(80)		175			(5)			222
Welfare Reform Team	169	57	0	0	0	0	0	0	0	0	226
Welfare Reform	169	57									226
Financial Services	3,669	(210)	0	0	58	(57)	0	(10)	0	0	3,450
Accountancy	67	(67)									0
Corporate Finance	0	6									6
Investigations	238	(14)						(10)			215
Procurement & Payments	142	(69)									54
Revenues & Benefits	3,166	20			58	(38)					3,206
Incomes	56	(86)									(30)

Oxford City Council's Revenue Budget at Portfolio Level 2017-18

Appendix 2

	Approved Budget 2016/17	MTFP assumptions	Fundamental Service Review	Contractua l Inflation	Pressures	Efficienc y Savings	Invest to Save	Fees & Charges	Service Reductions	New Investment	Recommended Budget 2017/18
	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's
Law & Governance	365	(35)	0	0	140	0	0	0	0	(32)	438
Committees & Members Services	25	(48)			23						0
Election Services	359	(20)			97						436
Legal Services	(59)	71			20					(32)	0
Executive Support	40	(39)									2
Community Services	17,631	548	0	93	124	(288)	(110)	(622)	(23)	140	17,493
Community Services	7,805	52	0	32	74	(208)	0	(21)	(23)	72	7,783
Leisure Management	1,792	54		32	74	(208)			(23)		1,721
Oxford Sport & Physical Activity	115	(16)									98
Sports Development	193	9									202
Parks Development	757	30									787
Community Centres	752	101								(1)	851
Youth Ambition	426	19									444
Town Hall & Facilities	264	(49)						(21)			194
Culture	477	48								30	555
Community Safety	1,208	(109)									1,099
Localities Team	1,823	(33)								43	1,832
Direct Services	9,041	466	0	61	35	(90)	(110)	(601)	0	25	8,827
Building Planned Operations	(2,527)	57		(115)							(2,585)
Building - Responsive Operations	385	110									496
Off Street Parking	(2,497)	19					(110)	(126)			(2,714)
Waste & Recycling Domestic	4,325	(24)		5	22			(16)			4,311
Waste & Recycling Commercial	(991)	56			(110)			(97)			(1,143)
Engineering	(395)	28		13				(307)			(661)
Street Scenes	4,094	104		2	61						4,261
Motor Transport	(335)	33		43	15			(45)			(289)
Caretaking & Miscellaneous	(122)	(1)									(123)
Local Overheads	3,582	101			20	(90)					3,612
Direct Building Services Stores	705	16		108							829
Pest Control & Dog Wardens	124	(28)						(10)			86
Parks - DS	2,696	(5)		5	27					25	2,747
Environmental Sustainability	784	30	0	0	15	10	0	0	0	43	882
Environmental Quality	305	3				10					318
Energy & Natural Resources	315	6									321
Smart, Sustainable Cities	164	21			15					43	244
Total Budget at Portfolio Level	21,475	579	(197)	98	1,533	(440)	(110)	(942)	(182)	(500)	21,314

99

Oxford City Council's Revenue Budget at Portfolio Level 2018-19 Appendix 2

	Recommended Budget 2017/18	Fundamental Service Review	Contractual Inflation	Pressures	Efficiency Savings	Invest to Save	Fees & Charges	Service Reductions	New Investment	Proposed Budget 2018/19
	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's
Chief Executive	220	0	0	0	0	0	0	0	0	220
Assistant Chief Executive	220	0	0	0	0	0	0	0	0	220
Assistant Chief Exec	174									174
Communications	(0)									(0)
Policy & Partnerships	46									46
Regeneration & Housing	(1,194)	(89)	0	115	(45)	0	(39)	(8)	(30)	(1,290)
Partnership Team	502	0	0	58	0	0	0	(8)	0	552
Partnership Team	502			58				(8)		552
Planning & Regulatory	2,787	0	0	32	(45)	0	(50)	0	0	2,724
Cultural Development	0									0
Development	344			(2)			(50)			292
Support Services	236									236
Information Services	(6)									(6)
Spatial Development	1,163									1,163
Environmental Health	1,049			34	(45)					1,038
Housing & Property	(4,483)	(89)	0	25	0	0	11	0	(30)	(4,566)
Community Housing & Strategy	758									758
Housing Needs	3,715	(89)								3,626
Property Services	(235)			25						(210)
Commercial Property	(9,186)						11		(30)	(9,205)
Office Accommodation	132									132
Property Support Services	332									332
Organisational Development & Corporate Services	4,796	0	0	198	(350)	0	(10)	0	0	4,633
Business Improvement	682	0	0	0	(235)	0	(10)	0	0	437
Transformation Projects	227									227
Business Improvement & Performance	216				(69)					146
Technology	17				(66)					(49)
Customer Services	0				(100)					(100)
Human Resources & Organisational Development	222						(10)			212
Welfare Reform Team	226	0	0	0	0	0	0	0	0	226
Welfare Reform	226									226
Financial Services	3,450	0	0	198	(115)	0	0	0	0	3,533
Accountancy	0									0
Corporate Finance	6									6
Investigations	215									215
Procurement & Payments	54				(50)					4
Revenues & Benefits	3,206			198	(65)					3,339
Incomes	(30)									(30)

67

Oxford City Council's Revenue Budget at Portfolio Level 2018-19 Appendix 2

	Recommended Budget 2017/18	Fundamental Service Review	Contractual Inflation	Pressures	Efficiency Savings	Invest to Save	Fees & Charges	Service Reductions	New Investment	Proposed Budget 2018/19
	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's
Law & Governance	438	0	0	0	0	0	0	0	0	438
Committees & Members Services	0									0
Election Services	436									436
Legal Services	0									0
Executive Support	2									2
Community Services	17,493	0	61	400	(119)	(160)	(1,129)	0	(103)	16,443
Community Services	7,783	0	0	0	(32)	0	(6)	0	(60)	7,686
Leisure Management	1,721				(32)					1,689
Oxford Sport & Physical Activity	98									98
Sports Development	202									202
Parks Development	787									787
Community Centres	851								(22)	829
Youth Ambition	444									444
Town Hall & Facilities	194						(6)			188
Culture	555								5	560
Community Safety	1,099									1,099
Localities Team	1,832								(43)	1,790
Direct Services	8,827	0	61	415	(87)	(160)	(1,123)	0	(25)	7,908
Building Planned Operations	(2,585)		(115)							(2,700)
Building - Responsive Operations	496									496
Off Street Parking	(2,714)			732		(160)	(1,037)			(3,179)
Waste & Recycling Domestic	4,311		5	(320)			(16)			3,980
Waste & Recycling Commercial	(1,143)						(45)			(1,188)
Engineering	(661)		13				(5)			(653)
Street Scenes	4,261		2							4,263
Motor Transport	(289)		43	3			(10)			(253)
Caretaking & Miscellaneous	(123)									(123)
Local Overheads	3,612				13					3,625
Direct Building Services Stores	829		108		(100)					837
Pest Control & Dog Wardens	86						(10)			76
Parks - DS	2,747		5	0					(25)	2,727
Environmental Sustainability	882	0	0	(15)	0	0	0	0	(18)	849
Environmental Quality	318									318
Energy & Natural Resources	321									321
Smart, Sustainable Cities	244			(15)					(18)	211
Total Portfolio Budget	21,314	(89)	61	713	(514)	(160)	(1,178)	(8)	(133)	20,006

89

Oxford City Council's Revenue Budget at Portfolio Level 2019-20 Appendix 2

	Proposed Budget 2018/19	Fundamental Service Review	Contractual Inflation	Pressures	Efficiency Savings	Invest to Save	Fees & Charges	Service Reductions	New Investment	Proposed Budget 2019/20
	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's
Chief Executive	220	0	0	0	0	0	0	0	0	220
Assistant Chief Executive	220	0	0	0	0	0	0	0	0	220
Assistant Chief Exec	174									174
Communications	(0)									(0)
Policy & Partnerships	46									46
Regeneration & Housing	(1,290)	14	0	5	0	0	70	(7)	(25)	(1,233)
Partnership Team	552	0	0	0	0	0	0	(7)	0	545
Partnership Team	552							(7)		545
Planning & Regulatory	2,724	0	0	0	0	0	0	0	(25)	2,699
Cultural Development	0									0
Development	292									292
Support Services	236									236
Information Services	(6)									(6)
Spatial Development	1,163								(25)	1,138
Environmental Health	1,038									1,038
Housing & Property	(4,566)	14	0	5	0	0	70	0	0	(4,477)
Community Housing & Strategy	758									758
Housing Needs	3,626	14								3,640
Property Services	(210)			5						(205)
Commercial Property	(9,205)						70			(9,135)
Office Accommodation	132									132
Property Support Services	332									332
Organisational Development & Corporate Services	4,633	0	0	74	(272)	0	(10)	0	0	4,425
Business Improvement	437	0	0	(15)	(207)	0	(10)	0	0	204
Transformation Projects	227									227
Business Improvement & Performance	146				(54)					92
Technology	(49)			(15)						(64)
Customer Services	(100)				(153)					(253)
Human Resources & Organisational Development	212						(10)			202
Welfare Reform Team	226	0	0	0	0	0	0	0	0	226
Welfare Reform	226									226
Financial Services	3,533	0	0	89	(65)	0	0	0	0	3,557
Accountancy	0									0
Corporate Finance	6									6
Investigations	215									215
Procurement & Payments	4									4
Revenues & Benefits	3,339			89	(65)					3,363
Incomes	(30)									(30)

69

Oxford City Council's Revenue Budget at Portfolio Level 2019-20 Appendix 2

	Proposed Budget 2018/19	Fundamental Service Review	Contractual Inflation	Pressures	Efficiency Savings	Invest to Save	Fees & Charges	Service Reductions	New Investment	Proposed Budget 2019/20
	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's
Law & Governance	438	0	0	0	0	0	0	0	0	438
Committees & Members Services	0									0
Election Services	436									436
Legal Services	0									0
Executive Support	2									2
Community Services	16,443	0	61	8	0	0	(81)	0	(55)	16,376
Community Services	7,686	0	0	0	0	0	0	0	(30)	7,656
Leisure Management	1,689									1,689
Oxford Sport & Physical Activity	98									98
Sports Development	202									202
Parks Development	787									787
Community Centres	829									829
Youth Ambition	444									444
Town Hall & Facilities	188									188
Culture	560								(30)	530
Community Safety	1,099									1,099
Localities Team	1,790									1,790
Direct Services	7,908	0	61	8	0	0	(81)	0	0	7,896
Building Planned Operations	(2,700)		(115)							(2,815)
Building - Responsive Operations	496									496
Off Street Parking	(3,179)						(40)			(3,219)
Waste & Recycling Domestic	3,980		5				(16)			3,969
Waste & Recycling Commercial	(1,188)						(10)			(1,198)
Engineering	(653)		13				(5)			(645)
Street Scenes	4,263		2	8						4,273
Motor Transport	(253)		43				(10)			(220)
Caretaking & Miscellaneous	(123)									(123)
Local Overheads	3,625				25					3,650
Direct Building Services Stores	837		108		(25)					920
Pest Control & Dog Wardens	76									76
Parks - DS	2,727		5							2,732
Environmental Sustainability	849	0	0	0	0	0	0	0	(25)	824
Environmental Quality	318									318
Energy & Natural Resources	321									321
Smart, Sustainable Cities	211								(25)	186
Total Portfolio Budget	20,006	14	61	87	(272)	0	(21)	(7)	(80)	19,787

70

Oxford City Council's Revenue Budget at Portfolio Level 2020-21 Appendix 2

	Proposed Budget 2019/20	Fundamental Service Review	Contractual Inflation	Pressures	Efficiency Savings	Invest to Save	Fees & Charges	Service Reductions	New Investment	Proposed Budget 2020/21
	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's
Chief Executive	220	0	0	0	0	0	0	0	0	220
Assistant Chief Executive	220	0	0	0	0	0	0	0	0	220
Assistant Chief Exec	174									174
Communications	(0)									(0)
Policy & Partnerships	46									46
Regeneration & Housing	(1,233)	(8)	0	0	0	0	(40)	(7)	0	(1,288)
Partnership Team	545	0	0	0	0	0	0	(7)	0	538
Partnership Team	545							(7)		538
Planning & Regulatory	2,699	0	0	0	0	0	0	0	0	2,699
Cultural Development	0									0
Development	292									292
Support Services	236									236
Information Services	(6)									(6)
Spatial Development	1,138									1,138
Environmental Health	1,038									1,038
Housing & Property	(4,477)	(8)	0	0	0	0	(40)	0	0	(4,525)
Community Housing & Strategy	758									758
Housing Needs	3,640	(8)								3,632
Property Services	(205)									(205)
Commercial Property	(9,135)						(40)			(9,175)
Office Accommodation	132									132
Property Support Services	332									332
Organisational Development & Corporate Services	4,425	0	0	71	52	0	0	0	0	4,549
Business Improvement	204	0	0	0	52	0	0	0	0	257
Transformation Projects	227									227
Business Improvement & Performance	92				0					92
Technology	(64)				52					(12)
Customer Services	(253)									(253)
Human Resources & Organisational Development	202									202
Welfare Reform Team	226	0	0	0	0	0	0	0	0	226
Welfare Reform	226									226
Financial Services	3,557	0	0	71	0	0	0	0	0	3,628
Accountancy	0									0
Corporate Finance	6									6
Investigations	215									215
Procurement & Payments	4									4
Revenues & Benefits	3,363			71						3,434
Incomes	(30)									(30)

71

Oxford City Council's Revenue Budget at Portfolio Level 2020-21 Appendix 2

	Proposed Budget 2019/20	Fundamental Service Review	Contractual Inflation	Pressures	Efficiency Savings	Invest to Save	Fees & Charges	Service Reductions	New Investment	Proposed Budget 2020/21
	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's
Law & Governance	438	0	0	0	0	0	0	0	0	438
Committees & Members Services	0									0
Election Services	436									436
Legal Services	0									0
Executive Support	2									2
Community Services	16,376	0	61	0	(25)	0	(171)	0	0	16,241
Community Services	7,656	0	0	0	0	0	0	0	0	7,656
Leisure Management	1,689									1,689
Oxford Sport & Physical Activity	98									98
Sports Development	202									202
Parks Development	787									787
Community Centres	829									829
Youth Ambition	444									444
Town Hall & Facilities	188									188
Culture	530									530
Community Safety	1,099									1,099
Localities Team	1,790									1,790
Direct Services	7,896	0	61	0	(25)	0	(171)	0	0	7,761
Building Planned Operations	(2,815)		(115)							(2,930)
Building - Responsive Operations	496									496
Off Street Parking	(3,219)						(155)			(3,374)
Waste & Recycling Domestic	3,969		5				(16)			3,958
Waste & Recycling Commercial	(1,198)									(1,198)
Engineering	(645)		13							(632)
Street Scenes	4,273		2							4,275
Motor Transport	(220)		43							(177)
Caretaking & Miscellaneous	(123)									(123)
Local Overheads	3,650									3,650
Direct Building Services Stores	920		108		(25)					1,003
Pest Control & Dog Wardens	76									76
Parks - DS	2,732		5							2,737
Environmental Sustainability	824	0	0	0	0	0	0	0	0	824
Environmental Quality	318									318
Energy & Natural Resources	321									321
Smart, Sustainable Cities	186									186
Total Portfolio Budget	19,787	(8)	61	71	27	0	(211)	(7)	0	19,721

72

Appendix 3 General Fund & HRA Budget Proposals 2017-18 to 2020-21

**General Fund Budget Proposals Summary
2017-18 to 2020-21**

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/Bids		Fundamental Service Reviews		Total Variation
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's
Assistant Chief Executive	0	0	0	(8)	0	0	0	0	0	0	0	0	0	0	0	(8)
Partnerships Team	0	35	0	0	0	0	0	0	0	(9)	0	(73)	1	0	0	(47)
Planning & Regulatory	0	226	0	0	0	0	0	(10)	0	0	0	(535)	0	0	0	(319)
Housing & Property	0	760	0	0	0	0	0	(295)	0	0	0	0	0	(117)	0	348
Environmental Sustainability	0	15	0	10	0	0	0	0	0	0	0	43	0	0	0	68
Community Services	32	74	0	(208)	0	0	0	(21)	0	(23)	0	72	0	0	0	(75)
Direct Services	61	35	1	(90)	0	(110)	0	(601)	14	0	0	25	0	0	0	(680)
Business Improvement & Organisational Development	5	190	0	(86)	0	0	0	(5)	0	(150)	0	0	0	(80)	0	(126)
Welfare Reform Team	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Financial Services	0	58	0	(57)	(1)	0	0	(10)	0	0	0	0	0	0	0	(9)
Law & Governance	0	140	1	0	0	0	0	0	0	0	0	(32)	0	0	0	108
Total	98	1,533	2.00	(440)	(1.00)	(110)	0	(942)	14.00	(182)	0.00	(500)	1.00	(197)	0.00	(740)

74

2018/19

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/Bids		Fundamental Service Reviews		Total Variation
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's
Assistant Chief Executive	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Partnerships Team	0	58	1	0	0	0	0	0	0	(8)	0	0	0	0	0	50
Planning & Regulatory	0	32	0	(45)	0	0	0	(50)	0	0	0	0	0	0	0	(63)
Housing & Property	0	25	0	0	0	0	0	11	0	0	0	(30)	0	(89)	0	(83)
Environmental Sustainability	0	(15)	0	0	0	0	0	0	0	0	0	(18)	0	0	0	(33)
Community Services	0	0	0	(32)	0	0	0	(6)	0	0	0	(60)	0	0	0	(97)
Direct Services	61	415	0	(87)	5	(160)	0	(1,123)	0	0	0	(25)	0	0	0	(919)
Business Improvement & Organisational Development	0	0	0	(235)	(4)	0	0	(10)	0	0	0	0	0	0	0	(245)
Welfare Reform Team	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Financial Services	0	198	0	(115)	(3)	0	0	0	0	0	0	0	0	0	0	83
Law & Governance	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	61	713	1	(514)	(2)	(160)	0	(1,178)	0	(8)	0	(133)	0	(89)	0	(1,308)

2019/20

**General Fund Budget Proposals Summary
2017-18 to 2020-21**

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/Bids		Fundamental Service Reviews		Total Variation	
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	
Assistant Chief Executive	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Partnerships Team	0	0	0	0	0	0	0	0	0	(7)	0	0	0	0	0	0	(7)
Planning & Regulatory	0	0	0	0	0	0	0	0	0	0	0	(25)	0	0	0	0	(25)
Housing & Property	0	5	0	0	0	0	0	70	0	0	0	0	0	14	0	0	89
Environmental Sustainability	0	0	0	0	0	0	0	0	0	0	0	(25)	0	0	0	0	(25)
Community Services	0	0	0	0	0	0	0	0	0	0	0	(30)	0	0	0	0	(30)
Direct Services	61	8	0	0	0	0	0	(81)	0	0	0	0	0	0	0	0	(12)
Business Improvement & Organisational Development	0	(15)	0	(207)	(3)	0	0	(10)	0	0	0	0	0	0	0	0	(232)
Welfare Reform Team	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Financial Services	0	89	0	(65)	(2)	0	0	0	0	0	0	0	0	0	0	0	24
Law & Governance	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	61	87	0	(272)	(4)	0	0	(21)	0	(7)	0	(80)	0	14	0	0	(218)

**General Fund Budget Proposals Summary
2017-18 to 2020-21**

2020/21

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/Bids		Fundamental Service Reviews		Total Variation	
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	
Assistant Chief Executive	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Partnerships Team	0	0	0	0	0	0	0	0	0	(7)	0	0	0	0	0	0	(7)
Planning & Regulatory	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Housing & Property	0	0	0	0	0	0	0	(40)	0	0	0	0	0	(8)	0	0	(48)
Environmental Sustainability	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Community Services	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Direct Services	61	0	0	(25)	0	0	0	(171)	0	0	0	0	0	0	0	0	(135)
Business Improvement & Organisational Development	0	0	0	52	(3)	0	0	0	0	0	0	0	0	0	0	0	52
Welfare Reform Team	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Financial Services	0	71	0	0	0	0	0	0	0	0	0	0	0	0	0	0	71
Law & Governance	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total	61	71	0	27	(3)	0	0	(211)	0	(7)	0	0	0	(8)	0	0	(67)

76

Total Summary

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/Bids		Fundamental Service Reviews		Total Variation	
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	
Assistant Chief Executive	0	0	0.00	(8)	0.00	0	0	0	0.00	0	0.00	0	0.00	0	0.00	0	(8)
Partnerships Team	0	93	1.00	0	0.00	0	0	0	0.00	(31)	0.00	(73)	1.00	0	0.00	0	(11)
Planning & Regulatory	0	258	0.00	(45)	0.00	0	0	(60)	0.00	0	0.00	(560)	0.00	0	0.00	0	(407)
Housing & Property	0	790	0.00	0	0.00	0	0	(254)	0.00	0	0.00	(30)	0.00	(200)	0.00	0	306
Environmental Sustainability	0	0	0.00	10	0.00	0	0	0	0.00	0	0.00	0	0.00	0	0.00	0	10
Community Services	32	74	0.00	(240)	0.00	0	0	(27)	0.00	(23)	0.00	(18)	0.00	0	0.00	0	(202)
Direct Services	244	458	1.00	(202)	5.00	(270)	0	(1,976)	14.00	0	0.00	0	0.00	0	0.00	0	(1,746)
Business Improvement & Organisational Development	5	175	0.00	(476)	(9.30)	0	0	(25)	0.00	(150)	0.00	0	0.00	(80)	0.00	0	(551)
Welfare Reform Team	0	0	0.00	0	0.00	0	0	0	0.00	0	0.00	0	0.00	0	0.00	0	0
Financial Services	0	416	0.00	(237)	(5.50)	0	0	(10)	0.00	0	0.00	0	0.00	0	0.00	0	169
Law & Governance	0	140	1.00	0	0.00	0	0	0	0.00	0	0.00	(32)	0.00	0	0.00	0	108

**General Fund Budget Proposals Summary
2017-18 to 2020-21**

Total	281	2,404	3.00	(1,199)	(9.80)	(270)	0	(2,352)	14.00	(204)	0.00	(713)	1.00	(280)	0.00	(2,333)
--------------	------------	--------------	-------------	----------------	---------------	--------------	----------	----------------	--------------	--------------	-------------	--------------	-------------	--------------	-------------	----------------

Risks - Efficiency Savings	2017-18	2018-19	2019-20	2020-21	Total
High	0	(165)	(90)	(25)	(280)
Medium	0	(145)	(153)	0	(298)
Low	(440)	(204)	(29)	52	(621)
Total	(440)	(514)	(272)	27	(1,199)

Contingency					
High - 30%	0	50	27	8	84
Medium - 0%	0	0	0	0	0
Low - 0%	0	0	0	0	0
Total	0	50	27	8	84

Risks - Fees & Charges	2017-18	2018-19	2019-20	2020-21	Total
High	(317)	(921)	(5)	(110)	(1,353)
Medium	(141)	(191)	(50)	(45)	(427)
Low	(484)	(66)	34	(56)	(572)
Total	(942)	(1,178)	(21)	(211)	(2,352)

Contingency					
High - 30%	95	276	2	33	406
Medium - 0%	0	0	0	0	0
Low - 0%	0	0	0	0	0
Total	95	276	2	33	406

Risks - Service Reductions	2017-18	2018-19	2019-20	2020-21	Total
High	0	0	0	0	0
Medium	0	0	0	0	0
Low	(182)	(8)	(7)	(7)	(204)
Total	(182)	(8)	(7)	(7)	(204)

Contingency					
High - 30%	0	0	0	0	0
Medium - 0%	0	0	0	0	0
Low - 0%	0	0	0	0	0
Total	0	0	0	0	0

Total Contingency	95	326	29	41	490
--------------------------	-----------	------------	-----------	-----------	------------

77

**Chief Executive Budget Proposals Summary
2017-18 to 2020-21**

2017/18

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/Bids		Fundamental Service		Total Variation
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's
Assistant Chief Executive	0	0	0.00	(8)	0.00	0	0	0	0.00	0	0.00	0	0.00	0.00	0.00	(8)
Total	0	0	0.00	(8)	0.00	0	0	0	0.00	0	0.00	0	0.00	0.00	0.00	(8)

2018/19

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/Bids		Fundamental Service		Total Variation
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's
Assistant Chief Executive	0	0	0.00	0	0.00	0	0	0	0.00	0	0.00	0	0.00	0.00	0.00	0
Total	0	0	0.00	0	0.00	0	0	0	0.00	0	0.00	0	0	0	0	0

2019/20

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/Bids		Fundamental Service		Total Variation
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's
Assistant Chief Executive	0	0	0.00	0	0.00	0	0	0	0.00	0	0.00	0	0.00	0.00	0.00	0
Total	0	0	0.00	0	0.00	0	0	0	0.00	0	0.00	0	0.00	0.00	0.00	0

2020/21

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/Bids		Fundamental Service		Total Variation
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's
Assistant Chief Executive	0	0	0.00	0	0.00	0	0	0	0.00	0	0.00	0	0.00	0.00	0.00	0
Total	0	0	0.00	0	0.00	0	0	0	0.00	0	0.00	0	0.00	0.00	0.00	0

Total Summary

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/Bids		Fundamental Service		Total Variation
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's
Assistant Chief Executive	0	0	0.00	(8)	0.00	0	0	0	0.00	0	0.00	0	0.00	0	0.00	(8)
Total	0	0	0.00	(8)	0.00	0	0	0	0.00	0	0.00	0	0.00	0.00	0.00	(8)

13	
14	

Total New Investment/Bids

Total Assistant Chief Executive Bids & Savings

New/Amended Bids & Savings

--	--	--	--	--	--	--	--	--	--

(8)

**Regeneration & Housing Budget Proposals Summary
2017-18 to 2020-21**

2017/18

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/ Bids		Fundamental Service Reviews		Total Variation
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's
Partnerships Team	0	35	0.00	0	0.00	0	0	0	0.00	(9)	0.00	(73)	1.00	0.00	0.00	(47)
Planning & Regulatory	0	226	0.00	0	0.00	0	0	(10)	0.00	0	0.00	(535)	0.00	0.00	0.00	(319)
Housing & Property	0	760	0.00	0	0.00	0	0	(295)	0.00	0	0.00	0	0.00	(117.00)	0.00	348
Total	0	1,021	0.00	0	0.00	0	0	(305)	0.00	(9)	0.00	(608)	1.00	(117.00)	0.00	(18)

2018/19

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/ Bids		Fundamental Service Reviews		Total Variation
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's
Partnerships Team	0	58	1.00	0	0.00	0	0	0	0.00	(8)	0.00	0	0	0	0	50
Planning & Regulatory	0	32	0.00	(45)	0.00	0	0	(50)	0.00	0	0.00	0	0	0	0	(63)
Housing & Property	0	25	0.00	0	0.00	0	0	11	0.00	0	0.00	(30)	0	(89)	0	(83)
Total	0	115	1.00	(45)	0.00	0	0	(39)	0.00	(8)	0.00	(30)	0	(89)	0	(96)

2019/20

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/ Bids		Fundamental Service Reviews		Total Variation
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's
Partnerships Team	0	0	0.00	0	0.00	0	0	0	0.00	(7)	0.00	0	0.00	0.00	0.00	(7)
Planning & Regulatory	0	0	0.00	0	0.00	0	0	0	0.00	0	0.00	(25)	0.00	0.00	0.00	(25)
Housing & Property	0	5	0.00	0	0.00	0	0	70	0.00	0	0.00	0	0.00	14.00	0.00	89
Total	0	5	0.00	0	0.00	0	0	70	0.00	(7)	0.00	(25)	0.00	14.00	0.00	57

2020/21

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/Bids		Fundamental Service Reviews		Total Variation
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's
Partnerships Team	0	0	0.00	0	0.00	0	0	0	0.00	(7)	0.00	0	0.00	0.00	0.00	(7)
Planning & Regulatory	0	0	0.00	0	0.00	0	0	0	0.00	0	0.00	0	0.00	0.00	0.00	0
Housing & Property	0	0	0.00	0	0.00	0	0	(40)	0.00	0	0.00	0	0.00	(8.00)	0.00	(48)
Total	0	0	0.00	0	0.00	0	0	(40)	0.00	(7)	0.00	0	0.00	(8.00)	0.00	(55)

Total Summary

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/Bids		Fundamental Service Reviews		Total Variation
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's
Partnerships Team	0	93	1.00	0	0.00	0	0	0	0.00	(31)	0.00	(73)	1.00	0	0.00	(11)
Planning & Regulatory	0	258	0.00	(45)	0.00	0	0	(60)	0.00	0	0.00	(560)	0.00	0	0.00	(407)
Housing & Property	0	790	0.00	0	0.00	0	0	(254)	0.00	0	0.00	(30)	0.00	(200)	0.00	306
Total	0	1,141	1.00	(45)	0.00	0	0	(314)	0.00	(31)	0.00	(663)	1.00	(200.00)	0.00	(112)

Proposal Partnership Team

H/M/L	2017-18	2018-19	2019-20	2020-21	FTE Impact				
	£000s	£000s	£000s	£000s	2017-18	2018-19	2019-20	2020-21	Total
Contractual Inflation									
1									
2									
Total Contractual Inflation									
Pressures									
3	Economic Development	Economic Development Manager	5	58			1.00		1.00
4	City Centre Management	Deletion of County Council Contribution to City Centre Manager Post	30			1.00			1.00
Total Pressures					35	58	1.00	1.00	2.00
Efficiencies									
5									
6									
Total Efficiencies									
Invest to Save									
7									
8									
Total Invest to Save									
Fees and Charges									
9									
10									
Total Fees and Charges									

Proposal		Partnership Team				FTE Impact				
		H/M/L	2017-18 £000s	2018-19 £000s	2019-20 £000s	2020-21 £000s	2017-18	2018-19	2019-20	2020-21
Service Reduction										
11	Tourism Expenses									
	Reduce grant to Visit Oxfordshire funding by 10% p.a. and agreed in the Cooperation Agreement.	L	(9)	(8)	(7)	(7)				
12										
Total Service Reduction			(9)	(8)	(7)	(7)				
New Investments / Bids										
13	Oxford Regeneration Programme		(25)							
	Oxford Station contribution to Governance for railway investment projects (GRIP) stage 3 - reversal of previous year bid									
14	Oxford Regeneration Programme		(100)							
	Oxpens Development Partner Procurement - Reversal of previous year bid									
15	Economic Development		52				1.00			1.00
	Principal Economic Development Officer									
Total New Investment/Bids			(73)				1.00			1.00
Total Partnership Team Bids & Savings			(47)	50	(7)	(7)	2.00	1.00		3.00
New/Amended Bids & Savings										

Planning & Regulatory

Proposal		H/M/L	2017-18 £000s	2018-19 £000s	2019-20 £000s	2020-21 £000s	FTE Impact				
							2017-18	2018-19	2019-20	2020-21	Total
Contractual Inflation											
1											
2											
Total Contractual Inflation											
Pressures											
3	Development	Planning Service Transformation	39	(2)							
4	Environmental Health	Environmental Health Service Transformation	32	(6)							
5	Environmental Health	Legacy Income Targets - Environmental Health (Enforcement of the Housing Act £20k, Street Trading Licences £25k, Primary Authority Scheme £40k)	85								
6	Environmental Health	Legacy Income Targets - Building Control	70	40							
Total Pressures			226	32							
Efficiencies											
7	Environmental Health	Extension of fee charging proactive work across private rented sector (moved back a year)		(45)							
8											
Total Efficiencies							(45)				
Invest to Save											
9											
10											
Total Invest to Save											

Proposal		Planning & Regulatory				FTE Impact					
		H/M/L	2017-18 £000s	2018-19 £000s	2019-20 £000s	2020-21 £000s	2017-18	2018-19	2019-20	2020-21	Total
Fees and Charges											
11	Development			(40)							
12	Development		(10)	(10)							
Total Fees and Charges			(10)	(50)							
Service Reduction											
13											
14											
Total Service Reduction											
New Investments / Bids											
15	Spatial Development		(560)								
16	Spatial Development		25		(25)						
Total New Investment/Bids			(535)		(25)						
Total Planning & Regulatory Bids & Savings			(319)	(63)	(25)						
New/Amended Bids & Savings											

Housing & Property

Proposal		H/M/L	2017-18 £000s	2018-19 £000s	2019-20 £000s	2020-21 £000s	FTE Impact				
							2017-18	2018-19	2019-20	2020-21	Total
Contractual Inflation											
1											
2											
Total Contractual Inflation											
Pressures											
3	Property Services		400								
4	Property Services		5	5	5						
5	Property Services		355	20							
Total Pressures			760	25	5						
Efficiencies											
6	Property Services	H		0							
7											
Total Efficiencies											
Invest to Save											
8											
9											
Total Invest to Save											
Fees and Charges											
10	Commercial Property	L	(230)	11	70	(40)					
11	Property Services	L	(65)								
Total Fees and Charges			(295)	11	70	(40)					

Housing & Property

Proposal		H/M/L	2017-18 £000s	2018-19 £000s	2019-20 £000s	2020-21 £000s	FTE Impact				
							2017-18	2018-19	2019-20	2020-21	Total
Service Reductions											
12:											
13:											
Total Service Reductions											
New Investments / Bids											
14:	Commercial Property	Consultancy Advice Westgate Development - reversal of previous years bid		(30)							
15:											
Total New Investment/Bids				(30)							
Fundamental Service Review											
16:	Housing Needs	Housing Bens Subsidy	(50)	(50)	100						
17:	Housing Needs	Homeless Housing	(67)	(39)	(86)	(8)					
Total Fundamental Service Review			(117)	(89)	14	(8)					
Total Housing & Property Bids & Savings			348	(83)	89	(48)					
New/Amended Bids & Savings											

**Organisational Development & Corporate Services Budget Proposals Summary
2017-18 to 2020-21**

2017/18

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/Bids		Fundamental Service Reviews		Total Variation
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's
Business Improvement & Organisational Development	5	190	0.00	(86)	0.00	0	0	(5)	0.00	(150)	0.00	0	0.00	(80.00)	0.00	(126)
Welfare Reform Team	0	0	0.00	0	0.00	0	0	0	0.00	0	0.00	0	0.00	0.00	0.00	0
Financial Services	0	58	0.00	(57)	(1.00)	0	0	(10)	0.00	0	0.00	0	0.00	0.00	0.00	(9)
Law & Governance	0	140	1.00	0	0.00	0	0	0	0.00	0	0.00	(32)	0.00	0.00	0.00	108
Total	5	388	1.00	(143)	(1.00)	0	0	(15)	0.00	(150)	0.00	(32)	0.00	(80.00)	0.00	(27)

2018/19

68

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/Bids		Fundamental Service Reviews		Total Variation
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's
Business Improvement & Organisational Development	0	0	0.00	(235)	(3.55)	0	0	(10)	0.00	0	0.00	0	0	0.00	0.00	(245)
Welfare Reform Team	0	0	0.00	0	0.00	0	0	0	0.00	0	0.00	0	0	0.00	0.00	0
Financial Services	0	198	0.00	(115)	(3.00)	0	0	0	0.00	0	0.00	0	0	0.00	0.00	83
Law & Governance	0	0	0.00	0	0.00	0	0	0	0.00	0	0.00	0	0	0.00	0.00	0
Total	0	198	0.00	(350)	(6.55)	0	0	(10)	0.00	0	0.00	0	0	0	0	(162)

2019/20

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/Bids		Fundamental Service Reviews		Total Variation
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's
Business Improvement & Organisational Development	0	(15)	0.00	(207)	(2.75)	0	0	(10)	0.00	0	0.00	0	0.00	0.00	0.00	(232)
Welfare Reform Team	0	0	0.00	0	0.00	0	0	0	0.00	0	0.00	0	0.00	0.00	0.00	0
Financial Services	0	89	0.00	(65)	(1.50)	0	0	0	0.00	0	0.00	0	0.00	0.00	0.00	24
Law & Governance	0	0	0.00	0	0.00	0	0	0	0.00	0	0.00	0	0.00	0.00	0.00	0
Total	0	74	0.00	(272)	(4.25)	0	0	(10)	0.00	0	0.00	0	0.00	0.00	0.00	(208)

2020/21

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/Bids		Fundamental Service Reviews		Total Variation
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's
Business Improvement & Organisational Development	0	0	0.00	52	(3.00)	0	0	0	0.00	0	0.00	0	0.00	0.00	0.00	52
Welfare Reform Team	0	0	0.00	0	0.00	0	0	0	0.00	0	0.00	0	0.00	0.00	0.00	0
Financial Services	0	71	0.00	0	0.00	0	0	0	0.00	0	0.00	0	0.00	0.00	0.00	71
Law & Governance	0	0	0.00	0	0.00	0	0	0	0.00	0	0.00	0	0.00	0.00	0.00	0
Total	0	71	0.00	52	(3.00)	0	0	0	0.00	0	0.00	0	0.00	0.00	0.00	123

Total Summary

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/Bids		Fundamental Service Reviews		Total Variation
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's
Business Improvement & Organisational Development	5	175	0.00	(476)	(9.30)	0	0	(25)	0.00	(150)	0.00	0	0.00	(80)	0.00	(551)
Welfare Reform Team	0	0	0.00	0	0.00	0	0	0	0.00	0	0.00	0	0.00	0	0.00	0
Financial Services	0	416	0.00	(237)	(5.50)	0	0	(10)	0.00	0	0.00	0	0.00	0	0.00	169
Law & Governance	0	140	1.00	0	0.00	0	0	0	0.00	0	0.00	(32)	0.00	0	0.00	108
Total	5	731	1.00	(713)	(14.80)	0	0	(35)	0.00	(150)	0.00	(32)	0.00	(80.00)	0.00	(274)

06

Business Improvement & Organisational Development

91

Proposal		H/M/L	2017-18 £000s	2018-19 £000s	2019-20 £000s	2020-21 £000s	FTE Impact				
							2017-18	2018-19	2019-20	2020-21	Total
Contractual Inflation											
1	Technology	Other software maintenance & licensing - Inflation on software contracts for system owned and maintained by the City Council	5								
2											
Total Contractual Inflation			5								
Pressures											
3	Human Resources	Apprenticeship Levy	175								
4	Technology	Digital Inclusion	15		(15)						
Total Pressures			190		(15)						
Efficiencies											
5	Customer Services	Impact of Universal Credit rollout on Contact Centre - savings pushed back one year		(55)	(55)			(2.25)	(2.25)		(4.50)
6	Customer Services	Shifting Service towards community settings and online self service - savings pushed back one year		(45)	(98)					(3.00)	(3.00)
7	Technology	Idox contract	(70)								
8	Business Improvement & Performance	Business Improvement Business Partners Staffing Reductions - £53k of savings pushed back on year		(62)	(53)		0.00	(1.30)	(0.50)		(1.80)
9	Technology	FMS and Itrent Saving	(6)	(66)		52					
10	Business Improvement & Performance	Procurement work plan savings	(10)	(7)	(1)	0					
Total Efficiencies			(86)	(235)	(207)	52	(3.55)	(2.75)	(3.00)	(9.30)	
Invest to Save											
11											
12											
Total Invest to Save											

Business Improvement & Organisational Development

Proposal		H/M/L	2017-18 £000s	2018-19 £000s	2019-20 £000s	2020-21 £000s	FTE Impact				
							2017-18	2018-19	2019-20	2020-21	Total
Fees and Charges											
13	Human Resources	Working in Partnership with other Local Authorities to offer employee related services	M	(5)	(10)	(10)					
14											
Total Fees and Charges				(5)	(10)	(10)					
Service Reduction											
15	Transformation	Reduction on Transformation base budget	L	(150)							
16											
Total Service Reduction				(150)							
New Investments / Bids											
17											
Total New Investment/Bids											
Fundamental Service Review											
18	Organisational Development	HR/OD Fundamental Service Review Proposals		(80)							
19											
Total Fundamental Service Review				(80)							
Total Business Improvement & Organisational Development Bids & Savings				(126)	(245)	(232)	52	(3.55)	(2.75)	(3.00)	(9.30)
New/Amended Bids & Savings											

92

Welfare Reform Team

Proposal

H/M/L	2017-18 £000s	2018-19 £000s	2019-20 £000s	2020-21 £000s	2017-18	FTE Impact			Total
						2018-19	2019-20	2020-21	
Contractual Inflation									
1									
Total Contractual Inflation									
Pressures									
2									
Total Pressures									
Efficiencies									
3									
Total Efficiencies									
Invest to Save									
4									
Total Invest to Save									
Fees and Charges									
5									
Total Fees and Charges									
Service Reduction									
6									
Total Service Reduction									
New Investments / Bids									
7									
Total New Investment/Bids									
Total Welfare Reform Team Bids & Savings									

93

New/Amended Bids & Savings

Financial Services

94

Proposal		H/M/L	2017-18 £000s	2018-19 £000s	2019-20 £000s	2020-21 £000s	FTE Impact				
							2017-18	2018-19	2019-20	2020-21	Total
Contractual Inflation											
1											
2											
Total Contractual Inflation											
Pressures											
3	Revenues & Benefits	Double running of systems when Universal Credit is implemented reversal of previous expenditure pushed back a year		(25)							
4	Revenues & Benefits	Housing Benefit Admin Grant reduction	58	223	89	71					
Total Pressures			58	198	89	71					
Efficiencies											
5	Revenues & Benefits	Impact of Universal Credit Rollout savings pushed back a year	H		(65)	(65)		(2.0)	(1.5)		(3.5)
6	Procurement & Payments	Procurement work plan savings	L	(19)							
7	Procurement & Payments	Procurement Staffing Reductions	L		(50)			(1.00)			(1.00)
8	Revenues & Benefits	Savings made from restructure of revenues team	L	(38)				(1.00)			(1.00)
Total Efficiencies				(57)	(115)	(65)		(1.0)	(3.0)	(1.5)	(5.5)
Invest to Save											
9											
Total Invest to Save											
Fees and Charges											
10	Investigations	Investigations Service Income		(10)							
11											
Total Fees and Charges				(10.0)							

Financial Services

Proposal		H/M/L	2017-18 £000s	2018-19 £000s	2019-20 £000s	2020-21 £000s	FTE Impact				
							2017-18	2018-19	2019-20	2020-21	Total
Service Reduction											
12											
13											
Total Service Reduction			<hr/>				<hr/>				
New Investments / Bids											
14											
15											
Total New Investment/Bids			<hr/>				<hr/>				
Total Financial Services Bids & Savings			(9)	83	24	71	(1.00)	(3.00)	(1.50)	(5.50)	
New/Amended Bids & Savings											

Law & Governance

Proposal

H/M/L	2017-18 £000s	2018-19 £000s	2019-20 £000s	2020-21 £000s	2017-18	FTE Impact				Total
						2018-19	2019-20	2020-21		
Contractual Inflation										
1										
2										
Total Contractual Inflation										
Pressures										
3	Election Services	Reversal of one off IER Grant in 16/17			97					
4	Members Services	Salary for committee officer servicing Housing Company, Oxwed and Growth Board net of income			23	1.00				
5	Legal Services	Increase in fees payable to Her Majesty's Court Service to issue and conduct court proceedings on the Council's behalf. The budget is held centrally by Legal Services. Fees are fixed by legislation and have been increased on several occasions in the last couple of years with no corresponding increase in budget. The level of increase can no longer be absorbed within the existing Service budget. 15/16 approved budget £12,500 - expenditure £23,000 . 16/17 approved budget £12,500 expenditure to date £17,500 and projected to continue at this rate throughout the year. Orders for costs are generally sought from the courts but are awarded entirely at the court's discretion.			20					
Total Pressures					140	1.00				
Efficiencies										
6										
7										
Total Efficiencies										
Invest to Save										
8										
9										
Total Invest to Save										

97

Proposal		Law & Governance				FTE Impact				Total
		H/M/L	2017-18 £000s	2018-19 £000s	2019-20 £000s	2020-21 £000s	2017-18	2018-19	2019-20	
Fees & Charges										
10										
11										
Total Fees & Charges			0	0	0	0				
Service Reduction										
12										
13										
Total Service Reduction										
New Investments / Bids										
14	Legal Services	This is the cessation of funding for an Archivist to be seconded to work on cataloguing that part of the City archive which is held in the Town Hall basement.	(32)							
Total New Investment/Bids			(32)							
Total Law & Governance Bids & Savings			108				1.00			
New/Amended Bids & Savings										

**Community Services Budget Proposals Summary
2017-18 to 2020-21**

2017/18

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/Bids		Service Reviews		Total Variation
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's
Environmental Sustainability	0	15	0.00	10	0.00	0	0	0	0.00	0	0.00	43	0.00	0.00	0.00	68
Community Services	32	74	0.00	(208)	0.00	0	0	(21)	0.00	(23)	0.00	72	0.00	0.00	0.00	(75)
Direct Services	61	35	1.00	(90)	0.00	(110)	0	(601)	14.00	0	0.00	25	0.00	0.00	0.00	(680)
Total	93	124	1.00	(288)	0.00	(110)	0	(622)	14.00	(23)	0.00	140	0.00	0.00	0.00	(687)

2018/19

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/Bids		Fundamental Service		Total Variation
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's
Environmental Sustainability	0	(15)	0.00	0	0.00	0	0	0	0.00	0	0.00	(18)	0	0.00	0.00	(33)
Community Services	0	0	0.00	(32)	0.00	0	0	(6)	0.00	0	0.00	(60)	0	0.00	0.00	(97)
Direct Services	61	415	0.00	(87)	5.00	(160)	0	(1,123)	0.00	0	0.00	(25)	0	0.00	0.00	(919)
Total	61	400	0.00	(119)	5.00	(160)	0	(1,129)	0.00	0	0.00	(103)	0	0	0	(1,050)

2019/20

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/Bids		Fundamental Service		Total Variation
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's
Environmental Sustainability	0	0	0.00	0	0.00	0	0	0	0.00	0	0.00	(25)	0.00	0.00	0.00	(25)
Community Services	0	0	0.00	0	0.00	0	0	0	0.00	0	0.00	(30)	0.00	0.00	0.00	(30)
Direct Services	61	8	0.00	0	0.00	0	0	(81)	0.00	0	0.00	0	0.00	0.00	0.00	(12)
Total	61	8	0.00	0	0.00	0	0	(81)	0.00	0	0.00	(55)	0.00	0.00	0.00	(67)

2020/21

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/Bids		Fundamental Service		Total Variation
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's
Environmental Sustainability	0	0	0.00	0	0.00	0	0	0	0.00	0	0.00	0	0.00	0.00	0.00	0
Community Services	0	0	0.00	0	0.00	0	0	0	0.00	0	0.00	0	0.00	0.00	0.00	0
Direct Services	61	0	0.00	(25)	0.00	0	0	(171)	0.00	0	0.00	0	0.00	0.00	0.00	(135)
Total	61	0	0.00	(25)	0.00	0	0	(171)	0.00	0	0.00	0	0.00	0.00	0.00	(135)

Total Summary

Service Area:	Contractual Inflation	Pressures		Efficiency Savings		Invest to Save		Fees & Charges		Service Reductions		New Investment/Bids		Fundamental Service Reviews		Total Variation
	£000's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's	FTE's	£000's
Environmental Sustainability	0	0	0.00	10	0.00	0	0	0	0.00	0	0.00	0	0.00	0	0.00	10
Community Services	32	74	0.00	(240)	0.00	0	0	(27)	0.00	(23)	0.00	(18)	0.00	0	0.00	(202)
Direct Services	244	458	1.00	(202)	5.00	(270)	0	(1,976)	14.00	0	0.00	0	0.00	0	0.00	(1,746)
Total	276	532	1.00	(432)	5.00	(270)	0	(2,003)	14.00	(23)	0.00	(18)	0.00	0.00	0.00	(1,938)

Environmental Sustainability

100

Proposal		H/M/L	2017-18 £000s	2018-19 £000s	2019-20 £000s	2020-21 £000s	FTE Impact				
							2017-18	2018-19	2019-20	2020-21	Total
Contractual Inflation											
1											
2											
Total Contractual Inflation											
Pressures											
3	Sustainable City	To enable delivery of the sustainability programme (Go Ultra Low), to base budget fund a new project manager role which is not funded by grant.	15	(15)							
4											
Total Pressures			15	(15)							
Efficiencies											
5	Environmental Quality	ED Efficiencies - reversal of primarily additional income in 16/17. Income target based on PPA/Pre-App. Major projects now ending and no others coming forward.	10								
6											
Total Efficiencies			10								
Invest to Save											
7											
Total Invest to Save											
Fees and Charges											
8											
9											
Total Fees and Charges											

Environmental Sustainability

Proposal		H/M/L	2017-18 £000s	2018-19 £000s	2019-20 £000s	2020-21 £000s	FTE Impact				
							2017-18	2018-19	2019-20	2020-21	Total
Service Reduction											
10											
11											
Total Service Reduction											
New Investments / Bids											
12	Sustainable City	Go Ultra Lo- Taxis	18	(18)							
13	Sustainable City	Small Cycle Schemes	25		(25)						
Total New Investment/Bids			43	(18)	(25)						
Total Environmental Sustainability Bids & Savings			68	(33)	(25)						
New/Amended Bids & Savings											

Community Services

102

Proposal		H/M/L	2017-18 £000s	2018-19 £000s	2019-20 £000s	2020-21 £000s	FTE Impact				
							2017-18	2018-19	2019-20	2020-21	Total
Contractual Inflation											
1	Leisure Management	Annual Leisure Management Contract RPIx adjustment (5% assumption).	(3)								
2	Leisure Management	Oxford Living wage uplift	35								
Total Contractual Inflation			32								
Pressures											
3	Leisure Management	Increased fee payable to Fusion under original contract due to equipment replacement costs	74								
4											
Total Pressures			74								
Efficiencies											
5	Leisure Management	Reduction in fee paid to Fusion in line with contract, and contract extension saving	L (196)	(20)							
6	Parks Development	Review and development of sports facilities (Linked to Line 11)	M								
7	Leisure Management	Procurement work plan savings	L (12)	(12)							
Total Efficiencies			(208)	(32)							
Invest to Save											
8											
9											
Total Invest to Save											

Community Services

103

Proposal		H/M/L	2017-18	2018-19	2019-20	2020-21	FTE Impact						
			£000s	£000s	£000s	£000s	2017-18	2018-19	2019-20	2020-21	Total		
Fees and Charges													
10	Town Hall & Facilities Town Hall 1930's extension - Rental & Service charge	L	(6)	(6)									
11	Town Hall & Facilities Increased Town Hall Income	L	(15)										
Total Fees and Charges			(21)	(6)									
Service Reduction													
12	Town Hall & Facilities Reduce Facilities Management - impact on 1.0 FTE (Saving no longer being made but replaced by line 10)	M											
13	Leisure Management Educational Attainment	L	(23)										
Total Service Reduction			(23)										
New Investment / Bids													
14	Community Centres Rose Hill Operating Costs (General Fund Share)		(3)	(20)									
15	Culture Pegasus Theatre / MESH Festival			5									
16	Culture Policy and Cultural Team		30		(30)								
17	Community Centres Cowley Community Centre equipment		2	(2)									
18	Localities Team Increase in Voluntary sector grants		43	(43)									
Total New Investment/Bids			72	(60)	(30)								
Total Community Services Bids & Savings			(75)	(97)	(30)								
New/Amended Bids & Savings													

Community Services

Proposal

		2017-18	2018-19	2019-20	2020-21	FTE Impact				
	H/M/L	£000s	£000s	£000s	£000s	2017-18	2018-19	2019-20	2020-21	Total
Efficiency Savings	Risks:	2017-18	2018-19	2019-20	2020-21	Total				
	High					0				0
	Medium	0	0	0	0	0				0
	Low	(208)	(32)	0	0	(240)				(240)
	Total	(208)	(32)	0	0	(240)				(240)
Fees & Charges	Risks:	2017-18	2018-19	2019-20	2020-21	Total				
	High					0				0
	Medium					0				0
	Low	(21)	(6)	0	0	(27)				(27)
	Total	(21)	(6)	0	0	(27)				(27)
Service Reduction	Risks:	2017-18	2018-19	2019-20	2020-21	Total				
	High					0				0
	Medium	0	0	0	0	0				0
	Low	(23)	0	0	0	(23)				(23)
	Total	(23)	0	0	0	(23)				(23)

Direct Services

Proposal

H/M/L	2017-18 £000s	2018-19 £000s	2019-20 £000s	2020-21 £000s	FTE Impact				Total
					2017-18	2018-19	2019-20	2020-21	
Contractual Inflation									
1 Engineering	13	13	13	13					
2 Street Scenes	2	2	2	2					
3 Motor Transport	43	43	43	43					
4 Direct Building services stores	108	108	108	108					
5 Direct services	(115)	(115)	(115)	(115)					
6 Parks - DS	5	5	5	5					
7 Waste Services	5	5	5	5					
	61	61	61	61					

Total Contractual Inflation

Pressures

8 Waste and Recycling Domestic	22								
9 Waste and Recycling Commercial	(110)	0							
10 Waste and Recycling Domestic		(320)							
11 Streetscene	15								
12 Streetscene	27	0	0	0	1.00				1.00
13 Streetscene	19								
14 Parks - DS	0								
15 Parks - DS	5	(5)	0						

Direct Services

Proposal		H/M/L	2017-18 £000s	2018-19 £000s	2019-20 £000s	2020-21 £000s	FTE Impact				Total
							2017-18	2018-19	2019-20	2020-21	
16	Parks - DS			0	0						
17	Parks - DS			5							
18	Parks - DS		15								
19	Parks - DS		7								
20	Motor Transport		15	3	8						
21	Off Street Parking			732							
22	Local Overheads		20								
Total Pressures			35	415	8		1.0				1.0
Efficiencies											
23	Local Overheads	L	10	15	25						
24	Building Services	H		(100)	(25)	(25)		5.00			5.00
25	Various	L	(75)								
26	Local Overheads	L	(25)	(2)							
Total Efficiencies			(90)	(87)		(25)		5.00			5.00

Direct Services

Proposal		2017-18	2018-19	2019-20	2020-21	FTE Impact				Total
H/M/L		£000s	£000s	£000s	£000s	2017-18	2018-19	2019-20	2020-21	
Invest to Save										
27	Off Street Parking	Increase income from Seacourt Park & Ride Extension. (Projected opening date slipped from Jan 17 to Oct 2017). Parking charges currently £2.00 rising to £3.00 in 2018/19.	(110)	(160)						
28										
Total Invest to Save			(110)	(160)						
Fees and Charges										
29	Off Street Parking	Additional income from car parking charges	M (83)	(43)	(40)	(45)				
30	Off Street Parking	Increase Park & Ride Charges from £2 to £3 per day	H	(500)						
31	Off Street Parking	Review of Off Street Parking (additional income moved back through various reasons including development delays and planning re Diamond Place), Oxpens removed due to car parks closing in March 18	H			(110)				
32	Off Street Parking	Share of Income in relation to Oxpens car park with decking from Oxwed until site redeveloped	H		(366)					
33	Waste and Recycling Domestic	Garden Waste 5% increase in charges reaches £52 per annum by 2019-20	L	(16)	(16)	(16)	(16)			
34	Waste and Recycling Commercial	Growth and Development of the Business - potential additional net contribution	L	(97)	(45)	(10)		4.00		4.00
35	Engineering	Additional Works net contribution	H	(307)	(5)	(5)		8.00		8.00
36	Motor Transport	DVSA Lane/Additional Works net contribution	L	(45)	(10)	(10)		2.00		2.00
37	Pest Control & Dog Wardens	Reduction in subsidy in relation to pest control works	M	(10)	(10)					
38	Off Street Parking	Additional Income from additional Park & Ride Usage	M	(43)	(128)					
Total Fees and Charges			(601)	(1,123)	(81)	(171)	14.00			14.00

107

Direct Services

Proposal	H/M/L	2017-18	2018-19	2019-20	2020-21	FTE Impact				Total
		£000s	£000s	£000s	£000s	2017-18	2018-19	2019-20	2020-21	
Service Reductions										
39										
40										
Total Service Reductions										
New Investments / Bids										
41	Parks - DS	Design Costs for Cowley Marsh Pavillion	25	(25)						
42										
Total New Investment/Bids			25	(25)						
Total Direct Services Bids & Savings			(680)	(919)	(12)	(135)	15.00	5.00		20.00

New/Amended Bids & Savings

Efficiency Savings	Risks:	2017-18	2018-19	2019-20	2020-21	Total
	High	0	(100)	(25)	(25)	(150)
	Medium					0
	Low	(90)	13	25	0	(52)
	Total	(90)	(87)	0	(25)	(202)
Fees & Charges	Risks:	2017-18	2018-19	2019-20	2020-21	Total
	High	(307)	(871)	(5)	(110)	(1,293)
	Medium	(136)	(181)	(40)	(45)	(402)
	Low	(158)	(71)	(36)	(16)	(281)
	Total	(601)	(1,123)	(81)	(171)	(1,976)
Service Reduction	Risks:	2017-18	2018-19	2019-20	2020-21	Total
	High					0
	Medium					0
	Low					0
	Total	0	0	0	0	0

HRA Detailed Budget Proposals 2017-18 to 2020-21

Proposal	2017-18	2018-19	2019-20	2020-21	FTE Impact				Total
	£000s	£000s	£000s	£000s	2017-18	2018-19	2019-20	2020-21	
Total Contractual Inflation									
Cumberledge House (decant, utilities cut off, demolishing)	(80)								
Energy Officer (rest funded from GF reserve of underspend in previous years).	25	(25)							
Flexible Tenancies	18	(18)							
Decants	70	(40)							
Electrical upgrades within planned maintenance	300		(300)						
Underhill Circus - Decants and Homeless assuming buy backs are capital	45			(45)					
Regeneration -Blackbird Leys	100								
Communal Areas, staff, van and other costs	77		(77)						
IT Northgate Replacement (2*grade 8, 1*grade 7, contribution to PM)	180		(180)						
Total Pressures	735	(83)	(557)	(45)					

1% efficiency in voids and responsive repairs			(57)	(60)
---	--	--	------	------

--	--	--	--	--

Total Efficiency Savings

			(57)	(60)
--	--	--	------	------

--	--	--	--	--

--	--	--	--	--

--	--	--	--	--

Total Invest to Save

--	--	--	--	--

--	--	--	--	--

Service Charges		(300)		
-----------------	--	-------	--	--

--	--	--	--	--

Total Fees & Charges

			(300)	
--	--	--	-------	--

--	--	--	--	--

110

--	--	--	--	--

--	--	--	--	--

Total Service Reductions

--	--	--	--	--	--

Removal of one off project costs on Barton Regeneration	(100)			
Removal of one off project costs Tower Blocks			(100)	
Removal of one off project costs on Affordable Homes Programme	(100)			
Removal of Energy Conservation Officer one off costs	(100)			

--	--	--	--	--	--

Total New Investment

(300)		(100)		
-------	--	-------	--	--

--	--	--	--	--	--

Total HRA

135	(83)	(714)	(105)	
-----	------	-------	-------	--

--	--	--	--	--	--

1
1
1

This page is intentionally left blank

	<u>2017/18</u>	<u>2018/19</u>	<u>2019/20</u>	<u>2020/21</u>
	£m	£m	£m	£m
<u>Income</u>				
Dwelling Rents	(41,667)	(40,672)	(40,917)	(41,503)
Service Charges	(1,567)	(1,582)	(1,597)	(1,612)
Garage Income	(216)	(214)	(219)	(223)
Miscellaneous Income	(783)	(783)	(783)	(783)
Right to Buy (Retained Admin Fee)	(52)	(59)	(59)	(59)
Total Income	(44,285)	(43,310)	(43,575)	(44,180)
<u>Expenditure</u>				
Management and Services (Stock Related)	9,346	9,400	9,455	9,511
Other Revenue Spend (Stock Related)	861	911	947	1,974
Miscellaneous Expenditure (Not Stock Related)	226	231	236	240
Responsive & Cyclical Repairs	11,327	11,489	11,048	11,210
Depreciation	6,287	6,161	6,248	6,335
Total Expenditure	35,967	36,112	35,854	37,195
Net Operating Expenditure	(8,318)	(7,198)	(7,721)	(6,985)
Transfer (to)/from Major Repairs/Other Reser	2,775			
Revenue Contributions towards Capital	0	9,363	9,549	8,825
(Surplus)/Deficit for the Year	(5,543)	2,165	1,828	1,840
(Surplus)/Deficit b/fwd	(5,537)	(11,156)	(9,050)	(7,281)
Investment Income	(76)	(59)	(59)	(61)
(Surplus)/Deficit c/fwd	(11,156)	(9,050)	(7,281)	(5,502)

This page is intentionally left blank

Council House Rents By Estate

Estate	Average of Formula	Average of Actual	Average of
	Rent	Rent	Decrease
	£	£	%
Abingdon Abbey & Barton Ward	128.61	117.77	-1.00%
Abingdon Ward	123.96	123.96	-1.00%
Barton And Sandhills Ward	111.34	106.87	-1.00%
Blackbird Leys Ward	106.72	103.23	-1.00%
Carfax Ward	128.26	111.49	-1.00%
Churchill	96.57	96.56	-1.00%
Churchill Ward	107.71	104.87	-1.00%
Cowley	98.24	95.50	-1.00%
Cowley Marsh Ward	105.88	103.05	-1.00%
Headington	133.43	175.63	-1.00%
Headington Hill And Northway Ward	108.08	105.29	-1.00%
Headington Ward	108.25	106.25	-1.00%
Hinksey Park Ward	119.95	106.03	-1.00%
Holywell Ward	104.29	101.70	-1.00%
Iffley Fields	106.32	103.03	-1.00%
Jericho And Osney Ward	120.34	107.40	-1.00%
Kidlington Ward	108.46	106.94	-1.00%
Littlemore	137.98	127.69	-1.00%
Littlemore Ward	104.43	110.65	-1.00%
Lye Valley	123.76	127.17	-1.00%
Lye Valley Ward	105.20	100.61	-1.00%
Marston Ward	119.40	109.69	-0.21%
North Ward	120.33	113.38	-1.00%
Northfield Brook	105.94	102.32	-1.00%
Quarry And Risinghurst Ward	108.99	105.15	-1.00%
Rose Hill and Iffley	169.52	138.54	-1.00%
Rosehill And Iffley Ward	111.47	105.55	-1.00%
St Clements	114.03	109.45	-1.00%
St Mary'S Ward	112.91	110.94	-1.00%
Summertown Ward	110.27	103.57	-1.00%
Wolvercote Ward	103.83	99.64	-1.00%
Grand Total	110.08	105.65	-0.89%

This page is intentionally left blank

CAPITAL BUDGET 2017/18-2020/21

APPENDIX 6

	2017-18	2018-19	2019-20	2020-21
	£	£	£	£
General Fund Capital Programme				
C3039	ICT Infrastructure	400,000	255,000	155,000
C3044	ICT Software and Licences	150,000		
C3056	Agresso Upgrade	50,000		
C3057	Housing System Replacement	250,000	250,000	
C3058	CRM Application	100,000	-	
C3060	End-point Devices	150,000	150,000	150,000
G6013	Superconnected Cities		40,000	
Business Improvement		1,100,000	695,000	305,000
F1323	Bridge Over Fiddlers Stream	221,230		
F7009	CCTV Gipsy Lane Campus	60,000		
E3511	Renovation Grants	25,000	-	-
E3521	Disabled Facilities Grants	1,000,000	1,000,000	1,000,000
F0025	Westgate Public Realm Improvements	567,000		
NEW	Pedestrianisation of Queen Street	500,000		
Planning & Regulatory		2,373,230	1,000,000	1,000,000
E3555	Flood Alleviation at Northway & Marston	1,061,024		
E3557	Oxford and Abingdon Flood Alleviation Scheme	380,000	380,000	
E3558	Go Ultra Low	585,000	35,000	35,000
Environmental Sustainability		2,026,024	415,000	35,000
Housing Projects				
B0092	Acquisition of Investment Properties	3,260,000	5,039,000	708,000
M5023	Loan to OxWED	4,160,000		
NEW	Purchase of Leasehold	1,000,000		
NEW	Purchase of Homeless Properties	10,000,000		
NEW	Property Rationalisation	250,000		
M0521	Equity Loan Scheme for Teachers	100,000	100,000	
M5025	Phase 1 Affordable Housing at Barton Park		8,440,000	2,455,000
NEW	Phase 2 Affordable Housing at Barton Park			10,329,000
NEW	Loans to Housing Company	3,000,000	29,000,000	17,000,000
Housing & Property		21,770,000	42,579,000	20,163,000
Community Facilities				
B0078	Stage 2 Museum of Oxford Development	-	2,219,800	
NEW	Community Centres	1,450,000		
B0083	East Oxford Project (community centre)	500,000	1,500,000	-
B0084	Jericho Community Centre		200,000	
G3017	South Oxford Community Centre Café	-	100,000	
Outdoor Facilities				
A3129	Donnington Recreation Ground	44,375		
A4833	Horspath Sports Village	4,900,000		
A4839	Skate Parks	-	70,000	70,000
Community Services		6,894,375	4,089,800	70,000
Vehicles				
R0005	MT Vehicles/Plant Replacement Programme.	1,429,750	801,000	3,665,500
Cleansing Services				
T2282	Solar Compacting Bins		25,000	20,000
T2287	Waste Transfer Station for Recycling	2,368,000		
Car Parking				
NEW	Oatlands Recreation Ground Car Park	75,000		
B0086	Extension to Seacourt Park & Ride	2,300,194	500,000	
T2273	Car Parks Resurfacing	300,000	250,000	250,000
Direct Services		6,472,944	1,576,000	3,935,500
B0074	R & D Feasibility Fund	301,841	150,000	150,000
Financial Services		301,841	150,000	150,000
Total General Fund Schemes		40,938,414	50,504,800	25,588,500

<u>Housing Revenue Account Capital</u>					
<u>Special Projects</u>					
N6384	Tower Blocks	6,959,000	134,000	-	
<u>Planned Major Repairs</u>					
N6385	Adaptations for disabled	602,000	617,000	633,000	648,000
<u>Improvements</u>					
N6386	Structural	138,000	145,000	149,000	152,000
N6389	Damp-proof works (K&B)	99,000	104,000	107,000	110,000
N6434	Doors and Windows	200,000	200,000	200,000	200,000
N7020	Extensions & Major Adaptions	150,000	150,000	150,000	150,000
N7026	Communal Areas	166,000	174,000	178,000	183,000
NEW	Lifts	150,000			
<u>Regulatory</u>					
N4390	Kitchens & Bathrooms	2,255,000	2,333,000	2,413,000	2,496,000
N4391	Heating	1,816,000	2,262,000	2,310,000	2,357,000
N7041	Conversion to Gas to Elec	400,000			
N3692	Roofing	166,000	174,000	178,000	183,000
N6395	Electrics	424,000	434,000	443,000	443,000
<u>Estate Improvement</u>					
N7032	Great Estates: Estate Enhancements and Regeneration	1,200,000	1,200,000	1,200,000	600,000
N7042	Barton Regeneration	900,000	936,000	973,000	506,000
<u>Future Programme</u>					
N7040	BBL Regeneration	3,600,000	600,000	600,000	600,000
N7043	HVCH Payments/RP Nomination Rights		7,703,000	7,703,000	7,703,000
NEW	Development at Bracegirdle and Salford Road	1,325,000			
<u>Empty Properties</u>					
N6388	Major Voids	375,000	392,000	409,000	427,000
<u>Energy Efficiency Initiatives</u>					
N7033	Energy Efficiency Initiatives	300,000	300,000	300,000	300,000
Total Housing Revenue Account Schemes		21,225,000	17,858,000	17,946,000	17,058,000
Total Capital Programme (GF & HRA)		62,163,414	68,362,800	43,534,500	44,879,900

Fees & Charges

2017/18

Business Improvement Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Data subject access requests (unit cost)	10.00	10.00	0.00	0.00

Community Services Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Leisure Centres				
Standard rated & inclusive of VAT				
ALL THE FOLLOWING ACTIVITIES- ARE INCLUSIVE TO ACTIVE AND CHOICE MEMBERSHIP CARD HOLDERS				
Adult				
Casual Swimming	4.50	4.55	0.05	1.11
Family Swim Ticket	11.50	11.70	0.20	1.74
Hinksey Swimming	6.10	6.10	0.00	0.00
Hinksey Family Swim Ticket	18.00	18.30	0.30	1.67
Hinksey (early/late)	4.70	4.60	(0.10)	(2.13)
Hinksey Family Swim Ticket (early/late)	11.80	11.70	(0.10)	(0.85)
Sauna (LPLC)	6.30	6.30	0.00	0.00
Sauna & Swim (LPLC)	7.60	7.70	0.10	1.32
Water Workout	6.40	6.40	0.00	0.00
Badminton (per person)	3.60	3.65	0.05	1.39
Squash (per person)	4.10	4.15	0.05	1.22
U17/Over 60s/ Student				
Casual Swimming	2.80	2.90	0.10	3.57
Hinksey Swimming	4.00	4.10	0.10	2.50
Hinksey (early/late)	2.80	2.80	0.00	0.00
Sauna (LPLC)	3.10	3.20	0.10	3.15
Sauna & Swim (LPLC)	4.80	4.90	0.10	2.08
Water Workout	4.20	4.30	0.10	2.38
Badminton (per person)	2.60	2.70	0.10	3.85
Squash (per person)	2.70	2.80	0.10	3.70
Bonus Concessionary*				
Casual Swimming	1.20	1.30	0.10	8.33
Hinksey Swimming	1.20	1.30	0.10	8.33
Hinksey (early/late)	1.20	1.30	0.10	8.33
Sauna (LPLC)	1.20	1.30	0.10	8.33
Sauna & Swim (LPLC)	2.40	2.20	(0.20)	(8.33)
Water Workout	3.20	1.30	(1.90)	(59.38)
Badminton (per person)	1.20	1.30	0.10	8.33
Squash (per person)	1.20	1.30	0.10	8.33
ALL THE FOLLOWING ACTIVITIES- ARE INCLUSIVE TO ACTIVE AND CHOICE MEMBERSHIP CARD HOLDERS				
Adult				
Gyms	8.10	8.25	0.15	1.90
Express Induction – Proficient user	20.00	20.38	0.38	1.90
Beginner Induction– 1 Hr Cardio 1 Hr Resistance (Free)	22.00	22.40	0.40	1.81
Fitness programme	13.30	13.50	0.20	1.47
Programme & Health Review	9.10	9.20	0.10	1.13
Fitness Classes	6.40	6.50	0.10	1.51
Table Tennis	3.40	3.45	0.05	1.39
Racket Hire	1.50	1.50	(0.00)	(0.10)
U17/Over 60s/ Student				
Gyms	4.30	4.40	0.10	2.27
Aspires Academy	3.20	3.30	0.10	3.13
Express Induction – Proficient user	10.00	10.20	0.20	2.00
Beginner Induction– 1 Hr Cardio 1 Hr Resistance (Free)	11.00	11.00	0.00	0.00
Fitness programme	7.00	7.30	0.30	4.29
Programme & Health Review	6.20	6.40	0.20	3.23
Aspires Academy Induction	11.00	11.30	0.30	2.73
Fitness Classes	4.20	4.30	0.10	2.38
Table Tennis	2.60	2.70	0.10	3.85
Racket Hire	1.50	1.50	0.00	0.00
Bonus Concessionary*				
Aspires Fitness Gyms	1.20	1.30	0.10	8.33
Aspires Academy	1.20	1.30	0.10	8.33
Express Induction – Proficient user	5.00	5.00	0.00	0.00
Beginner Induction	5.00	5.00	0.00	0.00
Fitness programme	5.00	5.00	0.00	0.00
Programme & Health Review	5.00	5.00	0.00	0.00
Aspires Academy Induction	5.00	5.00	0.00	0.00
Fitness Classes	3.20	1.30	(1.90)	(59.38)
Table Tennis	1.20	1.30	0.10	8.33
Racket Hire	0.50	0.50	0.00	0.00

Community Services Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
ALL THE FOLLOWING ACTIVITIES ARE INCLUSIVE TO CHOICE MEMBERSHIP CARD HOLDERS				
Adult				
Skate general session	8.00	8.15	0.15	1.88
Tea time skate (Family Skate/Twilight)	5.20	5.30	0.10	1.95
Skate Disco Session	8.00	8.15	0.15	1.84
Family Skate Ticket (for 5)	28.50	29.00	0.50	1.75
Family Skate Ticket (for 4)	23.50	23.95	0.45	1.93
After School or Family Skate (5)	23.50	23.95	0.45	1.92
After School or Family Skate (4)	18.00	18.30	0.30	1.68
Disco family Skate (for 5)	34.00	34.50	0.50	1.46
Disco family Skate (for 4)	27.00	27.50	0.50	1.85
Skate Training 1	7.00	7.10	0.10	1.47
Skate Training 2	3.00	3.05	0.05	1.65
Guardian Fee (spectators who are supervising children)	1.20	1.20	0.00	0.23
Adult Group Lesson	38.00	38.70	0.70	1.85
U17/Over 60s/ Student				
Skate general session	6.20	6.40	0.20	3.23
Tea Time Skate (Family/ Twilight)	5.30	5.40	0.10	1.89
Skate Disco Session	8.00	8.20	0.20	2.50
Thursday evening Student Disco	4.80	4.90	0.10	2.08
Skate Training 1	4.70	4.80	0.10	2.13
Skate Training 2	2.50	2.60	0.10	4.00
Golden Blades (over 50)	4.30	4.40	0.10	2.33
Guardian Fee (spectators who are supervising children)	1.50	1.50	0.00	0.00
Junior Group Lesson	33.00	35.00	2.00	6.06
Bonus Concessionary				
Skate general session	2.00	2.00	0.00	0.00
Tea Time Skate	2.00	2.00	0.00	0.00
Skate Disco Session	2.00	2.00	0.00	0.00
Skate Training 1	2.00	2.00	0.00	0.00
Skate Training 2	2.00	2.00	0.00	0.00
Golden Blades (over 50)	2.00	2.00	0.00	0.00
Guardian Fee (spectators who are supervising children)	1.00	1.00	0.00	0.00
OTHER CHARGES (per session)				
Adult				
Aqua Natal	9.00	9.00	0.00	0.00
Physical Assessment	22.00	22.00	0.00	0.01
Body Fat Analysis	12.50	12.50	0.00	0.00
Aerobic Capacity Analysis	12.50	12.50	0.00	0.00
Fi-tech cholesterol test	12.50	12.50	0.00	0.00
GP Referral Sessions	1.50	1.30	(0.20)	(13.33)
GP Referral Sessions (Consultation 1)	5.50	5.80	0.30	5.45
Choice & Active				
Aqua Natal	7.80	7.90	0.10	1.32
Physical Assessment	12.00	12.20	0.20	1.63
Body Fat Analysis	6.40	6.50	0.10	1.56
Aerobic Capacity Analysis	6.40	6.50	0.10	1.56
Fi-tech cholesterol test	7.10	6.50	(0.60)	(8.45)
GP Referral Sessions	1.30	1.30	0.00	0.00
GP Referral Sessions (Consultation 1)	5.50	5.60	0.10	1.82
U17/Over 60s/ Student				
Aqua Natal	7.80	7.80	0.00	0.00
Aspires Physical Assessment	12.30	12.30	0.00	0.00
Body Fat Analysis	7.10	7.10	0.00	0.00
Aerobic Capacity Analysis	7.10	7.10	0.00	0.00
Fi-tech cholesterol test	7.10	7.10	0.00	0.00
GP Referral Sessions	1.30	1.30	0.00	0.00
GP Referral Sessions (Consultation 1)	5.50	5.50	0.00	0.00
Bonus Concessionary Membership				
Aqua Natal	4.20	4.20	0.00	0.00
Aspires Physical Assessment	6.50	6.50	0.00	0.00
Body Fat Analysis	3.50	3.50	0.00	0.00
Aerobic Capacity Analysis	3.50	3.50	0.00	0.00
Fi-tech cholesterol test	3.50	3.50	0.00	0.00
GP Referral Sessions	1.30	1.30	0.00	0.00
GP Referral Sessions (Consultation 1)	5.50	5.50	0.00	0.00

Community Services Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
SWIMMING LESSONS				
Adult				
Adult Swim Lessons (Per hour)	12.30	12.50	0.20	1.63
Adult Private Swim Lessons (Per half hour)	20.50	20.80	0.30	1.46
Choice, Active & Aqua				
Junior Swim Lessons (Per half hour)	6.00	6.10	0.10	1.67
Adult Swim Lessons (Per hour)	11.00	11.20	0.20	1.82
U17/Over 60s/ Student Slice				
Junior Swim Lessons (Per half hour)	6.00	6.10	0.10	1.67
Private Swim Lessons (Per half hour)	20.50	20.85	0.35	1.71
Adult Swim Lessons (Per hour)	9.00	9.15	0.15	1.67
Bonus Slice				
Junior Swim Lessons (Per half hour)	3.50	3.55	0.05	1.43
Adult Swim Lessons (Per hour)	7.20	7.30	0.10	1.39
Standard rated & inclusive of VAT				
Direct Debit Membership				
Choice Card				
Adult	49.00	48.90	(0.10)	(0.20)
Adult Corporate	44.10	44.00	(0.10)	(0.23)
Couple	84.00	30.50	(53.50)	(63.69)
Family (2 adults + 2 children)	111.00	83.50	(27.50)	(24.77)
Family Flex (1adult +3 children)	92.00	112.00	20.00	21.74
Family Corporate	99.90	99.00	(0.90)	(0.90)
Family Flex (1adult +3 children) Corporate	82.80	91.70	8.90	10.75
Concession (Individual)	31.00	82.50	51.50	166.13
Student Peak	37.00	36.60	(0.40)	(1.08)
Student Off Peak	30.00	30.50	0.50	1.67
Bonus Concessionary	25.00	19.00	(6.00)	(24.00)
Centre Only (new)	n/a	34.00		
Swim Only				
Adult	34.00	34.65	0.65	1.91
Over 60	20.00	20.00	0.00	0.00
Under 17	13.00	20.30	7.30	56.15
Family	69.00	70.30	1.30	1.89
Adult Corporate	30.60	n/a		
Family Corporate	62.10	n/a		
Adult Rink				
Skate Training	55.50	56.50	1.00	1.81
Choice plus skate training	80.00	80.15	0.15	0.19
Junior Rink				
Skate Training	42.00	42.80	0.80	1.90
Choice plus skate training	52.50	52.70	0.20	0.38
Annual Card				

Community Services Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Choice Card				
Adult 12 months for 11	539.00	537.50	(1.50)	(0.28)
Couple 12 months for 11	924.00	918.00	(6.00)	(0.65)
Family 12 months for 11 (2 adults + 2 children)	1221.00	1232.00	11.00	0.90
Family 12 months for 11 (1 adult + 3 children)	1012.00	999.99	(12.01)	(1.19)
Concession	341.00	335.50	(5.50)	(1.61)
Student 9 month Peak	299.00	292.50	(6.50)	(2.17)
Student 9 month Off Peak	230.00	244.00	14.00	6.09
Swim Only				
Adult 12 months for 11	374.00	381.00	7.00	1.87
Over 60	220.00	220.00	0.00	0.00
Under 17	143.00	223.30	80.30	56.15
Family	759.00	773.30	14.30	1.88
Adult (Hinksey)	195.00	198.00	3.00	1.54
Over 60 / under 17(Hinksey)	99.00	99.00	0.00	0.00
Family (Hinksey)	375.00	380.00	5.00	1.33
Skate				
Adult Choice Plus Skate Training	856.90	880.80	23.90	2.79
Junior Rink Plus Annual	564.30	579.80	15.50	2.75
Other Cards				
Choice				
Bolt on	30.40	31.20	0.80	2.63
Bolt on	19.80	22.20	2.40	12.12
Bonus				
Adult	2.90	3.00	0.10	3.45
Dependent	1.00	1.00	0.00	0.00
Staff				
Family	39.00	39.70	0.70	1.80
Individual wet & dry	27.00	27.50	0.50	1.86
Individual dry	21.00	21.40	0.40	1.90
Swim School				
Adult	51.00	52.30	1.30	2.55
Child	27.50	28.70	1.20	4.36
Reward (booking card)				
All	0.00	0.00	0.00	
Sport Pitches (per match unless other wise stated)				
Cricket				
Grass wicket - weekend & bank holidays (Cutteslowe & Horspath 1)	57.00	58.00	1.00	1.75
Grass wicket - weekdays (Cutteslowe & Horspath 1)	44.10	44.90	0.80	1.81
Grass Wicket - weekend & bank holidays (Horspath 2)	n/a			
Grass Wicket - weekdays (Horspath 2)	n/a			
Adults				
Full Size Pitch weekend & Bank holidays	40.00	40.70	0.70	1.75
Full Size Pitch weekend & Bank holidays 10 game booking - No VAT *	334.00	340.00	6.00	1.80
Full Size Pitch weekdays	30.80	31.40	0.60	1.95
Full Size Pitch weekdays 10 game - No VAT	257.00	262.00	5.00	1.95
Under 17's				
Full Size Pitch weekend & Bank holidays	20.50	20.90	0.40	1.95
Full Size Pitch weekend 10 game booking - No VAT	171.00	174.00	3.00	1.75
Full Size Pitch weekdays	15.90	16.20	0.30	1.89
Full Size Pitch weekdays 10 game - No VAT	n/a			
Under 11's				
Mini football	13.90	14.20	0.30	2.16
Mini football 10 game - No VAT	116.00	118.00	2.00	1.72
Five a side pitch	28.70	29.20	0.50	1.74
Court Place Farm Stadium inc changing rooms	116.00	118.00	2.00	1.72
Court Place Farm Stadium floodlights	39.00	39.70	0.70	1.79
Floodlit 5 a side (East Oxford) per hour	39.00	39.70	0.70	1.79
Floodlit football pitch (Rose Hill) per hour	39.00	39.70	0.70	1.79

Community Services Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Other Charges				
Baseball	47.20	48.00	0.80	1.69
Rugby	39.50	40.20	0.70	1.77
Tarmac floodlit training area per hour	18.50	18.80	0.30	1.62
Horspath Floodlights per hour	39.00	39.70	0.70	1.79
Athletics Adult	4.30	4.40	0.10	2.33
OCAC Member Athletics Adult	3.10	3.20	0.10	3.23
OCAC Member Athletics Adult - 12 week pass	74.00	75.00	1.00	1.35
Athletics Junior	2.60	2.60	0.00	0.00
OCAC Member Athletics Junior	2.00	2.00	0.00	0.00
OCAC Member Athletics Junior - 12 week pass	47.00	47.80	0.80	1.70
Athletics Match (senior)	400.00	407.00	7.00	1.75
Athletics Match (junior)	226.00	230.00	4.00	1.77
Athletics track centre with lights	39.00	39.70	0.70	1.79
Pavilions/Changing rooms				
Adults	20.20	20.60	0.40	1.98
Concessionary Rate (including U17's)	10.10	10.30	0.20	1.98
Under 11's	5.10	5.20	0.10	1.96
Adults 10 game booking - No VAT *	168.00	171.00	3.00	1.79
Concessionary Rate (including U17's) 10 game booking - No VAT *	84.00	86.00	2.00	2.38
Under 11's 10 game booking - No VAT *	42.30	43.10	0.80	1.89
Tea Room per hour	17.50	17.80	0.30	1.71
Summer Activities				
Tennis Court Hire - Adult	7.00	6.00	(1.00)	(14.29)
Tennis Court Hire - Concessions	3.60	3.00	(0.60)	(16.67)
Tennis Court Hire Floodlit - Adult	n/a	7.00		
Tennis Court Hire Floodlit - Concessions	n/a	4.00		
Bowls Adult	2.60	2.60	0.00	0.00
Bowls Conc.	1.40	1.40	0.00	0.00
Bowls Bonus Slice	1.30	1.30	0.00	0.00
Putting Adult	2.60	2.60	0.00	0.00
Putting Conc.	1.40	1.40	0.00	0.00
Putting Bonus	1.40	1.40	0.00	0.00
Putting Family Rate	5.40	5.50	0.10	1.85
Volley Ball < 10 people	1.30	1.30	0.00	0.00
Volley Ball > 10 people	12.30	12.50	0.20	1.63
Equipment Hire Bowls	1.30	1.30	0.00	0.00
Equipment Hire Tennis	1.30	1.30	0.00	0.00
Equipment Hire Putting	1.30	1.30	0.00	0.00
Sales lost tennis ball	1.30	1.30	0.00	0.00
Sales lost golf ball	1.30	1.30	0.00	0.00
Crazy Golf (Cutteslow)				
Family Ticket including golf club hire	15.00	15.30	0.30	2.00
Single Adult	6.00	6.10	0.10	1.67
Single Child	4.00	4.10	0.10	2.50
Club and ball hire	1.30	1.30	0.00	0.00
Mini Golf (Florence Park and Bury Knowle)				
Family Ticket including hire of clubs and balls	8.00	8.10	0.10	1.25
Single Adult	4.00	4.10	0.10	2.50
Single Child	2.00	2.00	0.00	0.00
Club and ball hire	1.30	1.30	0.00	0.00
Annual Club Charges				
Bowls				
Per Green (7 days a week) per season	2,550.00	2,596.00	46.00	1.80

Community Services Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Tennis				
Hard Court per season	2,100.00	2,138.00	38.00	1.81
Grass Court per season	2,400.00	2,443.00	43.00	1.79
Hard Court (floodlit) per season	2,550.00	2,596.00	46.00	1.80
Equipment Provided and Prices				
Goal Nets (set)	73.00	74.00	1.00	1.37
Corner Posts (each)	10.10	10.30	0.20	1.98
Corner Flags (each)	5.10	5.20	0.10	1.96
Net Pegs (each)	0.80	0.80	0.00	0.00
Soft Broom	12.30	12.50	0.20	1.63
Dust Pan & Brush	12.30	12.50	0.20	1.63
Dust Bin (each)	21.30	21.70	0.40	1.88
Other Charges				
Use of wrong pitch	35.90	36.50	0.60	1.67
Cost for over running per 10 minutes	7.20	7.30	0.10	1.39
Community Centres Fees and Charges				
Charges per hour session unless stated				
East Oxford Games Hall - hire of games hall	16.00	16.30	0.30	1.88
East Oxford Games Hall - hire of 10 sessions in advance	12.80	13.00	0.20	1.56
East Oxford Games Hall - Badminton court hire (new arrangement)	7.20	7.30	0.10	1.39
Rose Hill Community Centre - Bill Buckingham Ballroom tier 1	100.00	40.00	(60.00)	(60.00)
Rose Hill Community Centre - Bill Buckingham Ballroom tier 2	25.00	25.00	0.00	0.00
Rose Hill Community Centre - Norman Brown 1 tier 1	40.00	20.00	(20.00)	(50.00)
Rose Hill Community Centre - Norman Brown 1 tier 2	20.00	15.00	(5.00)	(25.00)
Rose Hill Community Centre - Norman Brown 2 tier 1	30.00	15.00	(15.00)	(50.00)
Rose Hill Community Centre - Norman Brown 2 tier 2	15.00	10.00	(5.00)	(33.33)
Rose Hill Community Centre - Norman Brown 1&2 tier 1	70.00	35.00	(35.00)	(50.00)
Rose Hill Community Centre - Norman Brown 1&2 tier 2	30.00	25.00	(5.00)	(16.67)
Rose Hill Community Centre - NBH teapoint tier 1	5.00	5.00	0.00	0.00
Rose Hill Community Centre - NBH teapoint tier 2	0.00	0.00	0.00	0.00
Rose Hill Community Centre - Youth 1 (hall) tier 1	40.00	20.00	(20.00)	(50.00)
Rose Hill Community Centre - Youth 1 (hall) tier 2	15.00	15.00	0.00	0.00
Rose Hill Community Centre - Youth 2 (chill out) tier 1	25.00	15.00	(10.00)	(40.00)
Rose Hill Community Centre - Youth 2 (chill out) tier 2	10.00	10.00	0.00	0.00
Rose Hill Community Centre - Youth 2&3 (chillout/kitchen) tier 1	30.00	20.00	(10.00)	(33.33)
Rose Hill Community Centre - Youth 2&3 (chillout/kitchen) tier 2	15.00	15.00	0.00	0.00
Rose Hill Community Centre - Youth 1&3 tier 1	45.00	20.00	(25.00)	(55.56)
Rose Hill Community Centre - Youth 1&3 tier 2	20.00	15.00	(5.00)	(25.00)
Rose Hill Community Centre - Youth 1,2&3 tier 1	75.00	40.00	(35.00)	(46.67)
Rose Hill Community Centre - Youth 1,2&3 tier 2	25.00	25.00	0.00	0.00
Rose Hill Community Centre - wedding	Up to 1200			
Rose Hill Community Centre - community wedding	15% discount on community rate			
Rose Hill Community Centre - Gym - monthly DD adult	23.00	23.50	0.50	2.17
Rose Hill Community Centre - Gym - monthly DD adult concession	15.00	15.00	0.00	0.00
Rose Hill Community Centre - Gym - monthly DD junior/65+	14.00	14.00	0.00	0.00
Rose Hill Community Centre - Gym - monthly DD junior/65+ concession	10.00	10.00	0.00	0.00
Rose Hill Community Centre - Gym - Family - monthly DD	60.00	61.00	1.00	1.67
Rose Hill Community Centre - Gym - Family - monthly DD concession	40.00	41.00	1.00	2.50
Rose Hill Community Centre - Gym - Adult casual	5.00	5.10	0.10	2.00
Rose Hill Community Centre - Gym - Adult casual concession	3.50	3.50	0.00	0.00
Rose Hill Community Centre - Gym Junior	3.50	3.50	0.00	0.00
Rose Hill Community Centre - Gym Junior concession	2.50	2.50	0.00	0.00
Blackbird Leys Community Centre - Jack Argent Rm tier 1	15.00	15.00	0.00	0.00
Blackbird Leys Community Centre - Jack Argent tier 2	10.00	10.00	0.00	0.00
Blackbird Leys Community Centre - Jack Argent tier 3	7.50	7.50	0.00	0.00
Blackbird Leys Community Centre - Meeting rm tier 1	10.00	10.00	0.00	0.00
Blackbird Leys Community Centre - Meeting rm tier 2	7.50	7.50	0.00	0.00
Blackbird Leys Community Centre - Meeting rm tier 3	5.00	5.00	0.00	0.00
Blackbird Leys Community Centre - Sports Hall tier 1	20.00	20.00	0.00	0.00
Blackbird Leys Community Centre - Sports Hall tier 2	15.00	15.00	0.00	0.00
Blackbird Leys Community Centre - Sports Hall tier 3	10.00	10.00	0.00	0.00
Blackbird Leys Community Centre - IT Suite (3hr Session)	9.00	9.00	0.00	0.00
Jubilee Centre - Hall, meeting rm, kitchen	15.00	15.00	0.00	0.00
East Oxford Community Centre - Upstairs Hall weekdays - tier 1	10.00	10.00	0.00	0.00
East Oxford Community Centre - Upstairs Hall weekdays - tier 2	11.00	11.00	0.00	0.00
East Oxford Community Centre - Upstairs Hall weekdays - tier 3	16.00	16.00	0.00	0.00
East Oxford Community Centre - Upstairs Hall Eve & Wkd - tier 1	12.00	12.00	0.00	0.00

Community Services Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
East Oxford Community Centre - Upstairs Hall Eve & Wkd - tier 2	13.00	13.00	0.00	0.00
East Oxford Community Centre - Upstairs Hall Eve & Wkd - tier 3	17.00	17.00	0.00	0.00
East Oxford Community Centre - downstairs Hall weekdays - tier 1	10.00	10.00	0.00	0.00
East Oxford Community Centre - downstairs Hall weekdays - tier 2	11.00	11.00	0.00	0.00
East Oxford Community Centre - downstairs Hall weekdays - tier 3	16.00	16.00	0.00	0.00
East Oxford Community Centre - downstairs Hall Eve & Wkd - tier 1	12.00	12.00	0.00	0.00
East Oxford Community Centre - downstairs Hall Eve & Wkd - tier 2	13.00	13.00	0.00	0.00
East Oxford Community Centre - downstairs Hall Eve & Wkd - tier 3	17.00	17.00	0.00	0.00
East Oxford Community Centre - Lounge weekdays - tier 1	9.00	9.00	0.00	0.00
East Oxford Community Centre - Lounge weekdays - tier 2	10.00	10.00	0.00	0.00
East Oxford Community Centre - Lounge weekdays - tier 3	15.00	15.00	0.00	0.00
East Oxford Community Centre - Lounge Eve & Wkd - tier 1	11.00	11.00	0.00	0.00
East Oxford Community Centre - Lounge Eve & Wkd - tier 2	12.00	12.00	0.00	0.00
East Oxford Community Centre - Lounge Eve & Wkd - tier 3	16.00	16.00	0.00	0.00
East Oxford Community Centre - Kitchen weekdays -	10.00	10.00	0.00	0.00
East Oxford Community Centre - Kitchen weekdays - over 3 hours	23.00	23.00	0.00	0.00
East Oxford Community Centre - Kitchen weekdays - over 5 hours	33.00	33.00	0.00	0.00
East Oxford Community Centre - Kitchen Eve & Wkd -	12.00	12.00	0.00	0.00
East Oxford Community Centre - Kitchen Eve & Wkd - over 3 hrs	28.00	28.00	0.00	0.00
East Oxford Community Centre - Kitchen Eve & Wkd - over 5 hrs	45.00	45.00	0.00	0.00
East Oxford Community Centre - Hall, Kitchen & Lounge tier 1&2 eve	80.00	80.00	0.00	0.00
East Oxford Community Centre - Hall, Kitchen & Lounge tier 1&2	100.00	100.00	0.00	0.00
East Oxford Community Centre - Hall, Kitchen & Lounge tier 3 wkdays	125.00	125.00	0.00	0.00
East Oxford Community Centre - Hall, Kitchen & Lounge tier 3 wkd	150.00	150.00	0.00	0.00
Barton Neighbourhood Centre - tier 1	19.00	19.00	0.00	0.00
Barton Neighbourhood Centre - tier 2	17.10	17.10	0.00	0.00
Events Charges				
Local Charity Events (per day)				
Small	50.00	50.00	0.00	0.00
Medium	100.00	100.00	0.00	0.00
Large	250.00	250.00	0.00	0.00
Extra-Large	500.00	500.00	0.00	0.00
Bond Payable £250 - £1,500				
Oxford Community Event (per day)				
Small	100.00	100.00	0.00	0.00
Medium	250.00	250.00	0.00	0.00
Large	350.00	350.00	0.00	0.00
Extra-Large	500.00	500.00	0.00	0.00
Bond Payable £250 - £1,500				
National Charity Events (per day)				
Small	250.00	250.00	0.00	0.00
Medium	400.00	400.00	0.00	0.00
Large	750.00	750.00	0.00	0.00
Extra-Large	1,250.00	1,250.00	0.00	0.00
Bond Payable £250 - £1,500				
City centre cultural performances (per day)				
Bond Payable £250	25 - 50	25 - 50		
Bonn Square - use of power/electricity	25 - 100	25 - 100		
Commercial Events				
1. City Centre - Bonn Sq, Broad St, Gloucester Green & other city locations (per day)				
Small	1,000.00	1,000.00	0.00	0.00
Medium	1,500.00	1,500.00	0.00	0.00
Large	2,000.00	2,000.00	0.00	0.00
Bond Payable £500 - £1,500				
2. Gloucester Green Market (per day)				
weekday	750.00	750.00	0.00	0.00
weekend	1,000.00	1,000.00	0.00	0.00
Bond Payable £500 - £1,500				
3. City Parks (per day)				
Small	1,000.00	1,000.00	0.00	0.00
Medium	1,500.00	1,500.00	0.00	0.00
Large	2,000.00	2,000.00	0.00	0.00

Community Services Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Extra-Large	4,000.00	4,000.00	0.00	0.00
Circus & Funfair	750.00	750.00	0.00	0.00
Circus & Funfair - community rate)	500.00	500.00	0.00	0.00
Bond Payable £500 - £2,500				
Non Refundable Environment Impact Fee	500 - 1000	500 - 1000		
4. Neighbourhood Parks (per day)				
Small	800.00	800.00	0.00	0.00
Medium	1,000.00	1,000.00	0.00	0.00
Large	1,200.00	1,200.00	0.00	0.00
Circus & Funfair	750.00	750.00	0.00	0.00
Circus & Funfair - community rate)	500.00	500.00	0.00	0.00
Bond Payable £500 - £1,500				
5. Local Parks (per day)				
Small	500.00	500.00	0.00	0.00
Medium	750.00	750.00	0.00	0.00
Large	1,000.00	1,000.00	0.00	0.00
Circus & Funfair	750.00	750.00	0.00	0.00
Circus & Funfair - community rate)	500.00	500.00	0.00	0.00
Bond Payable £500 - £1,500				
Sports Tournaments & associated events				
Bond Payable £250 - £1,500				
Promotional/Marketing				
Half Day	500.00	500.00	0.00	0.00
Full Day	1,000.00	1,000.00	0.00	0.00
Roaming & Sampling - no infrastructure: Full Day	500.00	500.00	0.00	0.00
Bond Payable £500 - £1,500				
Site visits - Park Rangers	75 per hour	75 per hour		
Education				
Oxford LEA - £2.50pp, min charge £25				
Oxford Non LEA - £5.00pp, min charge £50				
Non-Oxford LEA - £5.00pp, min charge £50				
Non-Oxford Non LEA - £6.00pp, min charge £60				
Use of existing Premises Licence (500-4999 people)				
Commercial	150.00	150.00	0.00	0.00
Local Charity & Community	25.00	25.00	0.00	0.00
Late application/submission fee if timescales/deadlines not met				
	75.00	75.00	0.00	0.00
South Park - Large Sized Events (over 499 people)				
Application Fee: non-refundable - Commercial	500.00	500.00	0.00	0.00
Application Fee: non-refundable - Local Community & Local Charity			0.00	0.00
	100.00	100.00		
Application Fee: National Charity	250.00	250.00	0.00	0.00
Filming - Commercial				
1. Half Day (4 hours or less)				
Small	250.00	250.00	0.00	0.00
Medium	500.00	500.00	0.00	0.00
Large	1,000.00	1,000.00	0.00	0.00
Bond Payable £250 - £1,500				
2. Full Day				
Small	500.00	500.00	0.00	0.00
Medium	1,000.00	1,000.00	0.00	0.00
Large	2,000.00	2,000.00	0.00	0.00
Bond Payable £250 - £1,500				
Filming - Non Commercial				
1. Half Day				
Small	75.00	75.00	0.00	0.00
Medium	150.00	150.00	0.00	0.00
Large	300.00	300.00	0.00	0.00
Bond Payable £250 - £1,000				
2. Full Day				
Small	150.00	150.00	0.00	0.00
Medium	300.00	300.00	0.00	0.00
Large	600.00	600.00	0.00	0.00
Bond Payable £250 - £1,500				

Community Services Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Road Closures				
Commercial Event Road Closures- Events (under 500 people)	100	100	0.00	0.00
Commercial Event Road Closures- Market and Street Fairs	250	250	0.00	0.00
Commercial Event Road Closures- Events (500 or more people)	300	300	0.00	0.00
Road closure with no commercial element inc street parties	No Fee	No Fee		
St Giles Fair Tolls - reasonable charges to be set by Head of Community Services				
Events & Culture notes:				
For Filming requests with less than 7 days notice, all charges will be doubled				
<i>Small Event: 0-100 people</i>				
<i>Medium Event: 100-499 people</i>				
<i>Large Event: 500-4999 people</i>				
<i>Extra Large Event: 5000+ people</i>				
<i>Extra-Extra Large Event: 20,000+ people</i>				
Filming (small): crew size 1-5 people				
Filming (medium): crew size 6-11 people				
Filming (large): crew size 12 + people				
Town Hall Charges				
Room Charges - Commercial Rates				
<i>(Hourly rate shown. Bookings must be for a minimum of 2 hours)</i>				
Main Hall	250.00	260.00	10.00	4.00
Assembly Room	150.00	160.00	10.00	6.67
Old Library	150.00	160.00	10.00	6.67
Long Room	90.00	90.00	0.00	0.00
Meeting Rooms	75.00	75.00	0.00	0.00
Room Charges - Community/Charity Rates				
<i>(Hourly rate shown. Bookings must be for a minimum of 2 hours)</i>				
Main Hall	125.00	130.00	5.00	4.00
Assembly Room	75.00	80.00	5.00	6.67
Old Library	75.00	80.00	5.00	6.67
Long Room	45.00	45.00	0.00	0.00
Meeting Rooms	37.50	37.50	0.00	0.00
Social Events Packages				
Civil Ceremonies				
<i>(Based on 2 hours room hire, with one hour prior to the ceremony start time and one hour after)</i>				
Main Hall	595	655	60.00	10.08
Assembly Room/Old Library	495	545	50.00	10.10
Court Room (new for 16/17)	395	435	40.00	10.13
St Aldate's Room	250	275	25.00	10.00
Wedding Receptions (per hour)				
Main Hall	250	260	10.00	4.00
Assembly Room/Old Library	150	160	10.00	6.67
St Aldate's Room	150	160	10.00	6.67
	75	75	0.00	0.00
Discounts				
Social Event Off - Peak Monday/Tuesday only				
Concessionary Meetings				
Preparation, Clearance or Rehearsal				
6 hours or more consecutive at the standard price				
Agency Commission room hire fees (maximum)	15%	15%	0.00	0.00
Royalties - based on total box office sales,				
Classical Concerts	4.80%	4.80%	0.00	0.00
Pop Concerts	3%	3%	0.00	0.00
Variety Performances	2%	2%	0.00	0.00
All other events including music, films, video, DVD films or promotional events	9%	9%	0.00	0.00

Community Services Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Box Office				
Minimum fee of £25 or 10% of sales (whichever is greater)	13%	13%	0.00	0.00
Technical Facilities				
Data Projector	50	50	0.00	0.00
Main Hall Projector & Screen (new for 16/17)	150	150	0.00	0.00
Flipchart, pad & pens (inc. in DDR)	15	15	0.00	0.00
Laptop computer (internal use only)	55	55	0.00	0.00
Lectern – table	FOC	FOC		
Lectern – free standing	FOC	FOC		
Long Room - AV Equipment	55	55	0.00	0.00
PA system (Main Hall)	100	100	0.00	0.00
Large Screen	55	55	0.00	0.00
Small pop up screen	27.5	27.5	0.00	0.00
Stage extension - Small	100	100	0.00	0.00
Stage extension - Large	200	200	0.00	0.00
Round table with linen cloth	14	14	0.00	0.00
Musical Equipment				
Organ – Events	110	110	0.00	0.00
Organ – rehearsal/practice (per hour)	13.5	13.5	0.00	0.00
Piano – events	75	75	0.00	0.00
Piano – rehearsal/practice (per hour)	13.5	13.5	0.00	0.00
License Holders & Door Supervisors				
TH Personal Licence holder				
Door Supervisors (per hr per Supervisor)	At Cost	At Cost		
Internal Charges				
Small meeting room hire Mon-Fri (8am-5pm extended to 10pm on selected weekdays)	FOC	FOC		
Cancellation less than 72 hrs before	50%	50%	0.00	0.00
Catering Charges				
Kitchen Hire per head (minimum 100)	4	4	0.00	0.00
Servery Hire Only (per day)	65	65	0.00	0.00
Distribution of Free Printed Matter				
Non Static - Annual Consent	400.00	400.00	0.00	0.00
Non Static - Monthly consent	100.00	100.00	0.00	0.00
Static Annual Consent	200.00	200.00	0.00	0.00
Non-profit and community organisations				
	50.00 per consent badge	50.00 per consent badge		
Replacement badge	25.00	25.00	0.00	0.00
Taxi Licensing				
Vehicles				
Hackney Carriage	400.00	400.00	0.00	0.00
HACKNEY CARRIAGE (LOW EMISSION VEHICLE)	300.00	300.00	0.00	0.00
Hackney Transfer of Ownership	100.00	100.00	0.00	0.00
Hackney Change of Vehicle	100.00	100.00	0.00	0.00
Hackney Plate Deposit	50.00	50.00	0.00	0.00
Hackney Temporary Vehicle	75.00	75.00	0.00	0.00
Private Hire	262.00	262.00	0.00	0.00
PRIVATE HIRE (LOW EMISSION VEHICLE)	162.00	162.00	0.00	0.00
Private Hire Transfer	100.00	100.00	0.00	0.00
Private Hire Change of Vehicle	100.00	100.00	0.00	0.00
Private Hire Temporary Vehicle	75.00	75.00	0.00	0.00
Drivers				
Hackney Combined (1 yr licence)	115.00	115.00	0.00	0.00
Hackney Combined (3 yr licence)	345.00	345.00	0.00	0.00
Private Hire (1 yr licence)	101.00	101.00	0.00	0.00
Private Hire (3 yr licence)	303.00	303.00	0.00	0.00
Additional Charges				
Mandatory Safeguarding Awareness Test - provided by Oxfordshire County Council	N/A	15.00		
Local Knowledge & Safeguarding Test	75.00	75.00	0.00	0.00
Local Knowledge & Safeguarding Re-Test	75.00	75.00	0.00	0.00
Disability Awareness Course	45.00	45.00	0.00	0.00
DBS check - all driver only, at cost	50.00	50.00	0.00	0.00
DVLA check - for new applicants only, at cost	8.00	8.00	0.00	0.00
Licence badge/replacement badge	10.00	10.00	0.00	0.00
Internal PHV Licence Plate	15.00	15.00	0.00	0.00

Community Services Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Internal HC Licence Plate	15.00	15.00	0.00	0.00
Replacement external plate	25.00	25.00	0.00	0.00
Exempt badge/replacement badge	25.00	25.00	0.00	0.00
Replacement approved fare chart	2.00	2.00	0.00	0.00
Replacement approved no smoking signs (includes VAT)	1.00	1.00	0.00	0.00
Duplicate paper licence (replacement)	2.00	2.00	0.00	0.00
Unpaid Cheque Charge	30.00	30.00	0.00	0.00
Amendments to Private Hire Operator Licence	25.00	25.00	0.00	0.00
Charge for Exemption Notice	50.00	50.00	0.00	0.00
Operator's Licence				
Vehicle 3 & under (1 YEAR LICENCE)	490.00	490.00	0.00	0.00
Vehicle 4 & over (1 YEAR LICENCE)	980.00	980.00	0.00	0.00
Vehicle 3 & under (5 YEAR LICENCE)	2,450.00	2450.00	0.00	0.00
Vehicle 4 & over (5 YEAR LICENCE)	4,900.00	4900.00	0.00	0.00
Motor Salvage Operators				
Scrap Metal Dealers (replaces Motor Salvage Operators)				
New Site Licence	1,200.00	1200.00	0.00	0.00
Renewal Site Licence	1,200.00	1200.00	0.00	0.00
Variation Site Licence	100.00	100.00	0.00	0.00
New Mobile Collector Licence	900.00	900.00	0.00	0.00
Renewal Mobile Collector Licence	900.00	900.00	0.00	0.00
Variation Mobile Collector Licence	100.00	100.00	0.00	0.00
Sex Establishments				
Sex establishment (Sex Shop or Sex Cinema)- New	8,520.00	8560.00	40.00	0.47
Sex establishment (Sex Shop or Sex Cinema)- Renewal	8,520.00	8560.00	40.00	0.47
Sex establishment (Sex Shop or Sex Cinema)- Variation/ transfer	1,170.00	1175.00	5.00	0.43
Sexual entertainment venues new	5,860.00	5890.00	30.00	0.51
Sexual entertainment venues renewal	5,320.00	5345.00	25.00	0.47
Sexual entertainment variation/ transfer	1,170.00	1175.00	5.00	0.43
Licensing Act 2003				
Application fee				
Application and Variation Fees - Premises Licenses and Club Premises Certificates - Minimum	100.00	100.00	0.00	0.00
Application and Variation Fees - Premises Licenses and Club Premises Certificates - Maximum	635.00	635.00	0.00	0.00
Enhanced fee for some premises with rateable value above £87,001 - Minimum	900.00	900.00	0.00	0.00
Enhanced fee for some premises with rateable value above £87,001 - Maximum	1,905.00	1,905.00	0.00	0.00
Additional fee for capacity of more than 5,000 people - Minimum	1,000.00	1,000.00	0.00	0.00
Additional fee for capacity of more than 5,000 people - Maximum	64,000.00	64,000.00	0.00	0.00
Annual fee				
Premises Licenses and Club Premises Certificates - Minimum	70.00	70.00	0.00	0.00
Premises Licenses and Club Premises Certificates - Maximum	350.00	350.00	0.00	0.00
Enhanced fee for some premises with rateable value above £87,001 - Minimum	640.00	640.00	0.00	0.00
Enhanced fee for some premises with rateable value above £87,001 - Maximum	1,050.00	1,050.00	0.00	0.00
Additional fee for capacity of more than 5,000 people - Minimum	500.00	500.00	0.00	0.00
Additional fee for capacity of more than 5,000 people - Maximum	32,000.00	32,000.00	0.00	0.00
Other Application Fees				
Personal Licence	37.00	37.00	0.00	0.00
Transfer of Premises Licence	23.00	23.00	0.00	0.00
Change of address	10.50	10.50	0.00	0.00
Copy of licence	10.50	10.50	0.00	0.00
Temporary Event Notice	21.00	21.00	0.00	0.00
Provisional Statement	315.00	315.00	0.00	0.00
Gambling Act 2005 - Premises				
Bingo Premises				
Application (3500 max permitted)	930.00	930.00	0.00	0.00
Annual fee (1000 max permitted)	610.00	610.00	0.00	0.00
Variation application (1750 max permitted)	1,330.00	1330.00	0.00	0.00
Transfer application (1200 max permitted)	430.00	430.00	0.00	0.00
Reinstatement application (1200 max permitted)	555.00	555.00	0.00	0.00
Provisional statement application (3500 max permitted)	805.00	805.00	0.00	0.00
Copy of licence	25.00	25.00	0.00	0.00
Notification of a change	50.00	50.00	0.00	0.00

Community Services Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Family Entertainment Centre				
Application (2000 max permitted)	750.00	750.00	0.00	0.00
Annual fee (750 max permitted)	680.00	680.00	0.00	0.00
Variation application (1000 max permitted)	1,000.00	1000.00	0.00	0.00
Transfer application (950 max permitted)	400.00	400.00	0.00	0.00
Reinstatement application (950 max permitted)	485.00	485.00	0.00	0.00
Provisional statement application (2000 max permitted)	660.00	660.00	0.00	0.00
Copy of licence	25.00	25.00	0.00	0.00
Notification of a change	50.00	50.00	0.00	0.00
Adult Gaming Centre				
Application (2000 max permitted)	750.00	750.00	0.00	0.00
Annual fee (1000 max permitted)	680.00	680.00	0.00	0.00
Variation application (2000 max permitted)	1,030.00	1030.00	0.00	0.00
Transfer application (1200 max permitted)	400.00	400.00	0.00	0.00
Reinstatement application (1200 max permitted)	485.00	485.00	0.00	0.00
Provisional statement application (2000 max permitted)	660.00	660.00	0.00	0.00
Copy of licence	25.00	25.00	0.00	0.00
Notification of a change	50.00	50.00	0.00	0.00
Betting Premises (Track)				
Application (2500 max permitted)	890.00	890.00	0.00	0.00
Annual fee (1000 max permitted)	805.00	805.00	0.00	0.00
Variation application (1250 max permitted)	1,250.00	1250.00	0.00	0.00
Transfer application (950 max permitted)	420.00	420.00	0.00	0.00
Reinstatement application (950 max permitted)	520.00	520.00	0.00	0.00
Provisional statement application (2500 max permitted)	730.00	730.00	0.00	0.00
Copy of licence	25.00	25.00	0.00	0.00
Notification of a change	50.00	50.00	0.00	0.00
Betting Premises (Other)				
Application (3000 max permitted)	835.00	835.00	0.00	0.00
Annual fee (600 max permitted)	600.00	600.00	0.00	0.00
Variation application (1500 max permitted)	1,160.00	1160.00	0.00	0.00
Transfer application (1200 max permitted)	420.00	420.00	0.00	0.00
Reinstatement application (1200 max permitted)	520.00	520.00	0.00	0.00
Provisional statement application (3000 max permitted)	730.00	730.00	0.00	0.00
Copy of licence	25.00	25.00	0.00	0.00
Notification of a change	50.00	50.00	0.00	0.00
Gambling Act 2005 - Permits				
Alcohol Premises Gaming Machine Permits				
Application	150.00	150.00	0.00	0.00
Existing operator application	100.00	100.00	0.00	0.00
Annual fee	50.00	50.00	0.00	0.00
Permit variation fee	100.00	100.00	0.00	0.00
Transfer of permit	25.00	25.00	0.00	0.00
Change of name on permit	25.00	25.00	0.00	0.00
Copy of permit	15.00	15.00	0.00	0.00
Notification of 2 machines	50.00	50.00	0.00	0.00
Club Gaming Permits and Club Gaming Machine Permits				
Application	200.00	200.00	0.00	0.00
Application (Club Premises Certificate holder)	100.00	100.00	0.00	0.00
Annual fee	50.00	50.00	0.00	0.00
Permit variation fee	100.00	100.00	0.00	0.00
Renewal	200.00	200.00	0.00	0.00
Renewal (Club Premises Certificate holder)	100.00	100.00	0.00	0.00
Permit variation fee	100.00	100.00	0.00	0.00
Copy of permit	15.00	15.00	0.00	0.00
Family Entertainment Centre Gaming Machine Permits				
Application	300.00	300.00	0.00	0.00
Existing operator application	100.00	100.00	0.00	0.00
Renewal	300.00	300.00	0.00	0.00
Change of name on permit	25.00	25.00	0.00	0.00
Copy of permit	15.00	15.00	0.00	0.00
Gambling Act 2005 Temporary Use Notice				
Submission of Notice	500.00	500.00	0.00	0.00
Copy of Notice	25.00	25.00	0.00	0.00

Community Services Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Miscellaneous Charges				
Copy of Premises/Person Entry in Licensing Register	21.00	21.00	0.00	0.00
Statement of Licensing Policy document	41.00	41.00	0.00	0.00
Statement of Gambling Policy document	41.00	41.00	0.00	0.00
Copy of Licensing Decision Notice	21.00	21.00	0.00	0.00
Current list of licensing applications	10.50	10.50	0.00	0.00
Fixed Penalty Notice Fines (N.B. 17/18 TBC)				
Full standard charge				
Depositing litter	80.00	80.00	0.00	0.00
Community Protection Notice	100.00	100.00	0.00	0.00
Public Space Protection Order	100.00	100.00	0.00	0.00
Failure to produce waste documents	300.00	300.00	0.00	0.00
Failure to produce authority to transport waste	300.00	300.00	0.00	0.00
Unauthorised distribution of free printed matter	80.00	80.00	0.00	0.00
Failure to comply with a waste receptacles notice (S46-domestic waste)	100.00	100.00	0.00	0.00
Failure to comply with a waste receptacles notice (S47- commercial waste)	100.00	100.00	0.00	0.00
Cycling on a footpath	30.00	30.00	0.00	0.00
Parking of vehicles exposed for sale on a road	100.00	100.00	0.00	0.00
Repairing vehicles in a road by a business	100.00	100.00	0.00	0.00
Dog Fouling (charge set by Statute)	50.00	50.00	0.00	0.00
Failure to comply with a dog control order	80.00	80.00	0.00	0.00
Failure to comply with a request to turn off an idling engine on a stationary vehicle	20.00	20.00	0.00	0.00
Graffiti/Flyposting	75.00	75.00	0.00	0.00
Nuisance parking	100.00	100.00	0.00	0.00
Abandoning a vehicle	200.00	200.00	0.00	0.00
Failure to nominate key holder within alarm notification area	75.00	75.00	0.00	0.00
Noise Act FPN (residential)	110.00	110.00	0.00	0.00
Noise from licensed premises	500.00	500.00		
Reduced charge if paid within 10 days				
Depositing litter	55.00	55.00	0.00	0.00
Community Protection Notice	60.00	60.00	0.00	0.00
Public Space Protection Order	60.00	60.00	0.00	0.00
Unauthorised distribution of free printed matter	55.00	55.00	0.00	0.00
Failure to comply with a waste receptacles notice (S46- domestic waste)	75.00	75.00	0.00	0.00
Failure to comply with a waste receptacles notice (S47- commercial waste)	75.00	75.00	0.00	0.00
Failure to comply with a dog control order	55.00	55.00	0.00	0.00
Graffiti/Flyposting	55.00	55.00	0.00	0.00
Failure to nominate key holder within alarm notification area	55.00	55.00	0.00	0.00

Environmental Sustainability Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Contaminated Land Enquiries (not Land Charges)				
Location enquires - fixed price	75.00	75.00	0.00	0.00
Locational enquires- additional questions	23.00	23.00	0.00	0.00
Air Quality Enquiries				
Provision of data and written advice	Value of time spent based on hourly rate decided by Service Manager	Value of time spent based on hourly rate decided by Service Manager		
Environmental Sustainability Enquiries				
Provision of advice (e.g. air quality, contaminated land, ecology, flood risk, energy management, renewable energy, etc)	Value of time spent based on hourly rate decided by Service Manager	Value of time spent based on hourly rate decided by Service Manager		
Planning pre-application advice (Standard rated & exclusive of VAT)- renewable energy compliance, contaminated land, air quality, ecology, flood risk				
Additional specialist advice required by the developer at pre-application stage to be charged extra on hourly rate basis.	50.00	75.00	25.00	50.00
Miscellaneous				
Air Quality Reports	26.00	26.00	0.00	0.00
Contaminated Land Strategy document	26.00	26.00	0.00	0.00

Housing Revenue Account Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
<u>Exempt from VAT</u>				
Other charges				
Sheltered Guest Room Hire per night	5.00	10.00	5.00	100.00
<u>Standard rated & exclusive of VAT</u>				
Other charges				
ASSA Key	20.00	20.00	0.00	0.00
Controlled Entry Key Fob	25.00	25.00	0.00	0.00
Residential Leasehold Solicitor Questionnaire Fee	126.00	250.00	124.00	98.41
Futher Requests beyond standard Leasehold Property Forms		100.00	100.00	
<u>Residential Leasehold consent for Alterations/Home Improvements</u>				
Simple request		50.00	50.00	
Complex request requiring a surveyor's inspection		100.00	100.00	
Charge for retrospective permission - simple request		75.00	75.00	
Charge for retrospective permission - complex request		125.00	125.00	
<u>Exempt from VAT (before discounts)</u>				
Council tenant	13.85	14.85	1.00	7.22
Council tenant Premium	15.95	16.95	1.00	6.27
Blue badge council	13.85	14.85	1.00	7.22
Blue badge council Premium	15.95	16.95	1.00	6.27
Mobility council	13.85	14.85	1.00	7.22
Mobility council Premium	15.95	16.95	1.00	6.27
Garage with in curtiledge	13.85	14.85	1.00	7.22
Replacement lost/damaged permit		15.00		15.00
<u>VATable (before discounts)</u>				
		-		
		-		
Private tenant	13.85	14.85	1.00	7.22
Private tenant Premium	15.95	16.95	1.00	6.27
Blue badge private	13.85	14.85	1.00	7.22
Blue badge private Premium	15.95	16.95	1.00	6.27
Mobility private	13.85	14.85	1.00	7.22
Mobility private Premium	15.95	16.95	1.00	6.27
Replacement lost/damaged permit		15.00		15.00
<u>Exempt from VAT (before discounts)</u>				
		-		
		-		
Parking spaces	13.49	14.49	1.00	7.41
Parking spaces (Blue Badge)	13.49	14.49	1.00	7.41
Replacement lost/damaged permit		15.00		15.00
<u>VATable (before discounts)</u>				
		-		
		-		
Parking spaces Private	13.49	14.49	1.00	7.41
Replacement lost/damaged permit		15.00		15.00

Law & Governance Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Legal Services				
Copies of legal documents		Reasonable charges (minimum 25.00) to be set by Head of Law and Governance		
Costs recovered from 3rd parties in legal transactions when instructed by this Council		Value of time spent based on hourly rate or fixed fee decided by Head of Law and Governance		
Fees recovered from other public sector bodies in connection with legal services provided		Value of time spent based on hourly rate or fixed fee decided by Head of Law and Governance		
Democratic Services				
Copies of the Constitution	25.00	25.00	0.00	0.00
Copies of agenda		Reasonable charges to be set by Head of Law and Governance		
Inspection of background papers		Reasonable charges to be set by Head of Law and Governance		
Certification of existence of recipient for continued payment of pension	0.00			
Research of non electronically archived minutes				
Hire of ballot boxes	15.00	15.00	0.00	0.00
Hire of polling screens	15.00	15.00	0.00	0.00
Certificates of Registration	15.00	15.00	0.00	0.00
Executive Support				
St Giles Fair Tolls		Reasonable charges to be set by Head of Law and Governance		

Planning & Regulatory Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Planning				
Standard rated & exclusive of VAT				
Operations				
1. New Dwellings				
a) Outline (site area not exceed 2.5 ha) - charge per 0.1 hectare	385.00	385.00	0.00	0%
a) Outline (sites of 2.5 ha or more) - plus £100 per 0.1 hectare in excess of 2.5 hectare	9,527.00	9,527.00	0.00	0%
b) Others (50 or less) - charge per dwelling	385.00	385.00	0.00	0%
b) Others (51 or more) - plus £100 per dwelling in excess of 50	19,049.00	19,049.00	0.00	0%
2. New buildings or extensions (except dwellings, agricultural buildings or plant):				
a) Outline (site area not exceed 2.5 ha) - charge per 0.1 hectare	385.00	385.00	0.00	0%
a) Outline (sites of 2.5 ha or more) - plus £100 per 0.1 ha in excess of 2.5 hectare	9,527.00	9,527.00	0.00	0%
b) Others:				
(i) where no floor area is created	195.00	195.00	0.00	0%
(ii) where floor area created is below 40 sq.m.	195.00	195.00	0.00	0%
(iii) where floor area is between 40 and 75 sq.m.	385.00	385.00	0.00	0%
(iv) where floor area is between 75 and 3,750 sq.m. - charge per 75 sq. m	385.00	385.00	0.00	0%
(v) where floor area exceeds 3,750 sq.m - plus £100 per 75 sq. m in excess of 3,750 sq m	19,049.00	19,049.00	0.00	0%
3. Erection, alteration or replacement of plant or machinery				
(a) Site area not exceed 5 ha - charge per 0.1 hectare	385.00	385.00	0.00	0%
(b) Site area exceeds 5 ha - plus £100 per 0.1 ha in excess of 5 hectare	19,049.00	19,049.00	0.00	0%
4. Extensions or alterations to existing dwellings				
(a) one dwelling	172.00	172.00	0.00	0%
(b) 2 or more dwellings	339.00	339.00	0.00	0%
5. Curtilage, parking and vehicular access				
(a) Operations within the curtilage of a dwelling house for domestic purposes (including gates, fences, etc)	172.00	172.00	0.00	0%
(b) Car park, road and access to serve single undertaking	195.00	195.00	0.00	0%
Uses				
6. Change of use of a building: dwellings				
(a) from existing dwelling to two or more dwellings for 50 or fewer - charge per extra dwelling	385.00	385.00	0.00	0%
(b) from existing dwelling to two or more dwellings over 50 dwellings - plus £100 per dwelling in excess of 50	19,049.00	19,049.00	0.00	0%
(c) from other building to one or more dwellings for 50 or fewer - charge per extra dwelling	385.00	385.00	0.00	0%
(d) from other building to one or more dwellings over 50 dwellings - plus £100 per dwelling in excess of 50	19,049.00	19,049.00	0.00	0%
7. Use of disposal of refuse or waste materials and open mineral storage				
(a) Site area not exceed 15 ha - charge per 0.1 hectare	195.00	195.00	0.00	0%
(b) Site area exceeds 15 ha - plus £100 per 0.1 ha in excess of 15 hectare	29,112.00	29,112.00	0.00	0%
8. Material change of use other than above	385.00	385.00	0.00	0%
9. Erection on land for purposes of agriculture	See Fee Regs			
10. Erection of glasshouses on land used for agriculture	See Fee Regs			
11. Operations connected with oil and natural gas of for winning and working of minerals	See Fee Regs			

Planning & Regulatory Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Plant and machinery				
12. Wind Turbines				
a) Site area not exceeding 5 ha - charge per 0.1 hectare	385.00	385.00	0.00	0%
b) Site area exceeds 5 ha - plus £100 per 0.1 ha in excess of 50 hectare	19,049.00	19,049.00	0.00	0%
Advertisements				
13. Advertising relating to business and displayed on the premises	110.00	110.00	0.00	0%
14. Advance directions signs	110.00	110.00	0.00	0%
15. All other advertisements, e.g. banners	385.00	385.00	0.00	0%
Any Other				
16. Any other operation not within any of above categories - charge per 0.1 hectare	195.00	195.00	0.00	0%
Determination				
17. Whether the prior approval of the Council is required for Installation of a radio mast, radio equipment, housing or public callbox (telecommunications)	385.00	385.00	0.00	0%
Demolition (Part 31)	80.00	80.00	0.00	0%
18. Confirmation of compliance with condition attached to planning permission				
a) Householder application - charge per request	28.00	28.00	0.00	0%
b) Any other type of application - charge per request	97.00	97.00	0.00	0%
Any fee paid will be refundable if the LPA fails to give written confirmation within a period of 12 weeks				
Other Permission				
19. Variation of conditions: Application for removal or variation of a condition following grant of planning permission	195.00	195.00	0.00	0%
Lawful Development Certificates				
20. Existing use or development	Same as full	Same as full		
21. Existing use – lawful not to comply with a particular condition	195.00	195.00	0.00	0%
22. Proposed use or development	Half the normal planning fee	Half the normal planning fee		
Application for a New Planning Permission to replace an Extant Planning Permission. SCHEDULE 1 - (PART SUBSTITUTED FOR PART 1 OF SCHEDULE 1 TO THE 1989 REGULATIONS) PART 1 - Fee for applications for a grant of replacement planning permission subject to a new time limit: England Schedule 1 Part 1 New 7B of The Town and Country Planning (Fees for Applications and Deemed applications) Regulations 1989 as amended)				
7B(1) Where an application of the description contained in article 10B(1)(b) of the Town and Country Planning (General Development Procedure Order 1995 is made (consultations before grant of a replacement planning permission subject to a new time limit) the following fees shall be paid to the local planning authority -				
(a) if the application is a householder application,	57.00	57.00	0.00	0%
(b) if the application is an application for major development,	575.00	575.00	0.00	0%
(c) in any other case,	195.00	195.00	0.00	0%
Application for a Non-material Amendment Following a Grant of Planning Permission (Fees for applications for non-material changes to planning permission: England Regulation 11E of The Town and Country Planning (Fees for Applications and Deemed applications) Regulations 1989) as amended)				
(a) if the application is a householder application,	28.00	28.00	0.00	0%
(b) in any other case,	195.00	195.00	0.00	0%

Planning & Regulatory Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Exempt from VAT				
Documents & Publications				
1st Decision notice	16.60	17.00	0.40	2%
Subsequent notice	16.60	17.00	0.40	2%
TPO's	22.00	22.50	0.50	2%
Legal Agreements	22.00	22.50	0.50	2%
Plans stamped Approved or Refused	6.60	7.00	0.40	6%
Local Development Framework Policies Map	25.50	26.00	0.50	2%
Oxford Core Strategy 2026	30.60	31.25	0.65	2%
Oxford Local Plan 2001-2016	76.50 (Oxford residents 50.00)	78.00 (Oxford residents 51.00)	1.50	2%
West End Area Action Plan 2007-2016	30.60	31.25	0.65	2%
Adopted Supplementary Planning Documents	7.65	8.00	0.35	5%
Sites and Housing Plan	25.50 plus 2.50 p&p	26.00 plus 3.00 p&p	1.00	4%
Barton Area Action Plan	30.60	31.25	0.65	2%
Northern Gateway Area Action Plan	30.60	31.25	0.65	2%
Provision of above documents and publications on the internet	FREE			
Provision of above documents and publications on the internet	FREE			
Subsequent plans according to size:				
AO plan	5.50	5.60	0.10	2%
A1 plan	5.50	5.60	0.10	2%
A2 plan	5.50	5.60	0.10	2%
A3 plan	0.00			
A4 plan	0.00			
Provision of above plans on the internet				
Other				
A4 Miscellaneous copies	0.00			
Subsequent copy	0.00			
Standard rated & exclusive of VAT				
Weekly schedule of applications				
By Post				
Commercial	181.20	185.00	3.80	2%
	151.00	154.00	3.00	2%
Local groups/residents	42.30	43.00	0.70	2%
	35.30	36.00	0.70	2%
Via email				
Commercial	46.00	47.00	1.00	2%
	38.50	39.25	0.75	2%
Local groups/residents	FREE			
Planning - Other charges				
Standard rated & exclusive of VAT				
Planning pre-application advice				
Large scale proposals (over 25 units or 2000m2)				
Charge per meeting	600.00	625.00	25.00	4%
Charge per written report	300.00	310.00	10.00	3%
Medium scale proposals (6-25 units or 500-2000m2)				
Charge per meeting	450.00	475.00	25.00	6%
Charge per written report	225.00	235.00	10.00	4%
Small scale proposals (up to 5 units or 499m2)				
Charge per meeting	300.00	325.00	25.00	8%
Charge per written report	150.00	160.00	10.00	7%

Planning & Regulatory Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Householder Developments				
NEW Charge per meeting	75.00	80.00	5.00	7%
NEW Charge per written report	37.50	40.00	2.50	7%
Listed Buildings - Non Householder				
NEW Charge per meeting	300.00	315.00	15.00	5%
NEW Charge per written report	150.00	160.00	10.00	7%
Listed Buildings - Householder				
NEW Charge per meeting	75.00	80.00	5.00	7%
NEW Charge per written report	37.50	40.00	2.50	7%
However, where a whole series of planning pre-application meetings is necessary, discounted bespoke charges may be negotiated if appropriate.				
Additional specialist advice (e.g. conservation, listed buildings, archaeology, trees, landscaping, housing, environmental protection, highways, etc) required by the developer at pre-application stage to be charged extra on hourly rate basis.	62.50	65.00	2.50	4%
Specialist consultant advice (eg. conservation, archaeology, trees, etc) to be provided on an hourly rate basis.	62.50	65.00	2.50	4%
However, bespoke one-off charges may be negotiated for production of substantial specialist documents, studies, reports etc.				
Requests for informal Permitted Development (PD) checks - To be introduced following availability of on-line expert advice system, including at planning reception. However submission of formal applications for Certificate of Lawful Use or Development is normally encouraged instead.	50.00	55.00	5.00	10%
<u>Exempt from VAT</u>				
Written requests for planning history and planning constraints searches	50.00	55.00	5.00	10%
Requests of hard copies of plans stamped approved or refused	6.12	6.50	0.38	6%
Application checking service per application	50.00	55.00	5.00	10%
Local Land Charges				
LLC1 form (Postal)	30.00	30.60	0.60	2%
LLC1 form (Electronic)	28.00	28.60	0.60	2%
LLC1 Additional Parcel	1.00	1.10	0.10	10%
Additional Enquiries	22.00	22.50	0.50	2%
<u>Standard rated & exclusive of VAT</u>				
Local Land Charges				
CON29R form (Postal)	90.00	91.80	1.80	2%
CON29R form (Electronic)	84.00	85.70	1.70	2%
CON29R Additional Parcel	16.00	16.40	0.40	3%
CON29O Optional Enquiries 4 to 21 (Additional parcel fees on application)	11.00	11.30	0.30	3%
CON29O Optional Enquiry 22 only	22.00	22.50	0.50	2%
Personal Searches				
Collection				
Land Charges Register	FREE			
CON29R Qu. 1.1k	FREE			
CON29R Qu. 3.7	FREE			
CON29R Qu. 3.8	FREE			

Planning & Regulatory Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Electronic				
Land Charges Register	5.00	5.10	0.10	2%
Compiled official answers combination of Qu. 1.1k, 3.4, 3.6, 3.7 and 3.8	15.00	15.30	0.30	2%
All other CON29R questions other than the above	As per official searches			
Official Answers for Component Data (CON29R)				
Charge by post				
Qu 1.1 a-e	7.00	7.20	0.20	3%
Qu 1.1 f-l	4.00	4.10	0.10	2%
Qu 1.2	5.00	5.10	0.10	2%
2.1-2.5	4.00	4.10	0.10	2%
Qu 3.1	3.00	3.10	0.10	3%
Qu 3.2	3.00	3.10	0.10	3%
Qu 3.3	Refer to Thames Water			
Qu 3.4 a-f	6.00	6.20	0.20	3%
Qu 3.5	3.00	3.10	0.10	3%
Qu 3.6 a-l	10.00	10.20	0.20	2%
Qu 3.7a-g	6.00	6.20	0.20	3%
Qu 3.8	4.00	4.10	0.10	2%
Qu 3.9a-n	20.00	20.40	0.40	2%
Qu 3.10 a-h	4.00	4.10	0.10	2%
Qu 3.11 a-b	4.00	4.10	0.10	2%
Qu 3.12 NEW		3.10	3.10	
Qu 3.13	3.00	3.10	0.00	0%
Q3.14	4.00	4.10	0.10	2%
Qu 3.15 NEW		4.10	4.00	
Charge Electronic				
Qu 1.1 a-e	6.50	6.70	0.20	3%
Qu 1.1 f-l	4.00	4.10	0.10	2%
Qu 1.2	4.50	4.60	0.10	2%
2.1-2.5	3.50	3.60	0.10	3%
Qu 3.1	2.50	2.60	0.10	4%
Qu 3.2	2.50	2.60	0.10	4%
Qu 3.3	Refer to Thames Water			
Qu 3.4 a-f	5.50	5.70	0.20	4%
Qu 3.5	2.50	2.60	0.10	4%
Qu 3.6 a-l	9.50	9.70	0.20	2%
Qu 3.7a-g	6.00	6.20	0.20	3%
Qu 3.8	4.00	4.10	0.10	2%
Qu 3.9a-n	20.00	20.40	0.40	2%
Qu 3.10 a-h	3.50	3.60	0.10	3%
Qu 3.11 a-b	3.50	3.60	0.10	3%
Qu 3.12 NEW		2.60	2.50	
Qu 3.13	2.50	2.60	0.10	4%
Q3.14	3.50	3.60	0.10	3%
Qu 3.15 NEW		3.60	3.50	

Planning & Regulatory Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
<u>Street Naming and Numbering Charges</u>				
<u>Exempt from VAT</u>				
Numbering of new developments (including sub-division of existing properties)				
1 plot	40.00	40.00	0.00	0%
2 plots	70.00	70.00	0.00	0%
3 plots	100.00	100.00	0.00	0%
4 - 20 plots	60.00 plus 15.00 per plot	60.00 plus 15.00 per plot	0.00	0%
21- 50 plots	155.00 plus 10.00 per plot	155.00 plus 10.00 per plot	0.00	0%
50+ plots	300.00 plus 5.00 per plot	300.00 plus 5.00 per plot	0.00	0%
New street name	100.00	100.00	0.00	0%
New building name (eg for blocks of flats / offices)	40.00	40.00	0.00	0%
Changes to new addresses caused by changes to development after issue of numbering scheme.	5.00 per plot	5.00 per plot		
Reissue of address following demolition and reconstruction	25.00	25.00	0.00	0%
Change of house name	40.00	40.00	0.00	0%
Addition of house name to numbered property	40.00	40.00	0.00	0%
Street renaming at the request of the owners	250.00 plus 20.00 per property	250.00 plus 20.00 per property	0.00	0%
<u>Building Control</u>				
Schedule 1				
Charges for the creation of or conversion to new dwellings - inclusive of VAT				
Number of Dwellings				
1	842.60	842.60	0.00	0%
2	1,123.10	1,123.10	0.00	0%
3	Please contact for quotation	Please contact for quotation		
Regularisation applications made in respect of unauthorised Schedule 1 work (i.e. where an application was not made at the time that the work was done) that has been undertaken since 1985, will be charged at an additional 50% of the standard fee, excluding VAT.				
Schedule 2				
Extension including controllable conservatories, not including basements (for more than one extension, use the total sum of internal floor area) - inclusive of VAT				
Extension up to 10m2	500.00	500.00	0.00	0%
10m2 – 40m2	641.30	641.30	0.00	0%
40m2 – 60m2	775.50	775.50	0.00	0%
60m2 – 100m2	842.60	842.60	0.00	0%
Over 100m2	Please contact for quotation	Please contact for quotation		
Basement or part basement	Please contact for quotation	Please contact for quotation		
Small domestic garages and carports and stores (Detached garages less than 30m2 may be exempt) - inclusive of VAT				
Up to 40m2	300.00	300.00	0.00	0%
40m2 – 60m2	400.00	400.00	0.00	0%
Over 100m2	Please contact for quotation	Please contact for quotation		

Planning & Regulatory Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Erection or non-habitable extension of detached building not used solely as a garage/carport/store - inclusive of VAT				
30m2 – 60m2	775.00	775.00	0.00	0%
60m2 – 100m2	842.60	842.60	0.00	0%
Over 100m2	Please contact for quotation	Please contact for quotation		
Loft conversion - inclusive of VAT				
Up to 100m2	584.10	584.10	0.00	0%
Over 100m2	Please contact for quotation	Please contact for quotation		
Conversion of garage to habitable space - inclusive of VAT				
Up to 10m2	500.00	500.00	0.00	0%
Up to 40m2	641.30	641.30	0.00	0%
40m2 – 60m2	775.50	775.50	0.00	0%
Over 60m2	Please contact for quotation	Please contact for quotation		
Controllable work (Not Competent Person Schemes) - inclusive of VAT				
Rewire/partial rewire of a single dwelling	Please contact for quotation	Please contact for quotation		
Any other controllable electrical work	Please contact for quotation	Please contact for quotation		
Multiple work (eg extension & basement/loft conversion/works) - inclusive of VAT				
up to £100,000	1,023.00	1,023.00	0.00	0%
Underpinning	Please contact for quotation	Please contact for quotation		
Energy efficiency improvements (Not Competent Person Scheme) - inclusive of VAT				
New and replacement windows and doors (Up to 7 windows and 2 doors to be installed at the same time).	135.30	135.30	0.00	0%
Removal/renovation of a thermal element	169.40	169.40	0.00	0%
Installation of solar panel/s	250.00	250.00	0.00	0%
Regularisation applications made in respect of unauthorised Schedule 2 work (i.e. where an application was not made at the time that the work was done) that has been undertaken since 1985, will be charged at an additional 50% of the standard fee, excluding VAT.				
Schedule 3				
Works not listed in schedules 1 or 2 e.g. Structural alterations, refurbishments, internal alterations - inclusive of VAT				
Estimated cost of works				
£0 - £5000	297.00	297.00	0.00	0%
£5001 - £10,000	371.00	371.00	0.00	0%
£10,001 - £20,000	539.00	539.00	0.00	0%
£20,001 - £50,000	709.00	709.00	0.00	0%
£50,001 - £75,000	1012.00	1012.00	0.00	0%
£75,001 - £100,000	1348.00	1348.00	0.00	0%
>£100,000	Please contact for quotation	Please contact for quotation		
Regularisation applications made in respect of unauthorised Schedule 3 work (i.e. where an application was not made at the time that the work was done) that has been undertaken since 1985, will be charged at an additional 50% of the standard fee, excluding VAT.				
Schedule 4				
All general costs such as chargeable advice, requests for viewing documentation, dealing with previously deposited applications etc will be based on the hourly rate	59.00	59.00	0.00	0%
Inspection and Provision of a Fire Risk Assessment Report	300.00	300.00	0.00	0%
Miscellaneous Fees - VAT needs to be added				
Copy of Approval Notice	20.60	21.00	0.40	2%
Copy of Completion Certificate	20.60	21.00	0.40	2%
Response to Solicitor enquires in relation to house sales	15.90	16.20	0.30	2%
Response to householders written enquiries re house sales	6.00	6.10	0.10	2%

Planning & Regulatory Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Food Hygiene Training				
Exempt from VAT				
Programmed Certificated Courses (charges are per person)				
Level 2 Award in Food Safety in Catering (Foundation)	75.00	75.00	0.00	0%
Level 3 Award in Supervising Food Safety in Catering (Intermediate)	250.00	250.00	0.00	0%
Level 4 Award in Managing Food Safety in Catering (Advanced)	730.00	730.00	0.00	0%
Level 2 Award in Health & Safety in the Workplace (Foundation)	90.00	90.00	0.00	0%
Exam resit charge- Level 2 award in Food Safety in Catering (Foundation)	POA	POA		
Exam resit charge- Level 3 award in Supervising Food Safety in Catering (Intermediate)	POA	POA		
Group Certificated Courses (for businesses requesting own on-site training)				
Level 2 Awards in Food Safety or Health & Safety - charge per candidate	68.00 (+travel cost if outside Oxford)	68.00 (+travel cost if outside Oxford)	0.00	0%
Level 2 Awards in Health & Safety - charge per candidate (minimum 10 delegates)	81.00 (+travel cost if outside Oxford)	81.00 (+travel cost if outside Oxford)	0.00	0%
Level 3 Award in Supervising Food Safety (3 day course, plus ½ day revision) - charge per candidate (minimum 10 delegates)	225.00 (+travel cost if outside Oxford)	225.00 (+travel cost if outside Oxford)	0.00	0%
Advanced Level 4 Food Hygiene (5 day course, plus 1 day revision) - charge per candidate (minimum 10 delegates)	657.00 (+travel cost if outside Oxford)	657.00 (+travel cost if outside Oxford)	0.00	0%
Other non certificated part day and day courses				
Other non specified training courses (minimum 10 delegates)	POA	POA		
Other Bespoke courses across Planning & Regulatory Services				
Charges for bespoke training courses will be calculated to take into account market rates	POA	POA		
Sustainable Food Advice				
Charging for business advice (e.g noise, pre planning application advice, odour etc) - per hour	55.00	56.00	1.00	2%
Food Business set up and advice consultation- per hour	55.00	56.00	1.00	2%
Primary Authority Initial Set Up Fee	POA	POA		
Primary Authority Hourly Fee	POA	POA		
Miscellaneous				
Accommodation assessments for UK entry clearance - charge per report	340.00	348.00	8.00	2%
Request for confirmation of registration in support of work permit application	50.00	51.00	1.00	2%
Food Condemnation Certificate (e.g. insurance claim for freezer breakdown, damaged food)- minimum 1 hour	85.00	86.50	1.50	2%
Works in default across Planning and Regulatory Services	Value of time spent based on hourly rate decided by Head of Planning and Regulatory Services	Value of time spent based on hourly rate decided by Head of Planning and Regulatory Services		
Provision of factual statements etc across Planning and Regulatory Services	Value of time spent based on hourly rate decided by Head of Planning and Regulatory Services	Value of time spent based on hourly rate decided by Head of Planning and Regulatory Services		

Planning & Regulatory Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Copy of Legal Notice	22.00	22.50	0.50	2%
Copy of Premises/Person Entry in Licensing Register	21.00	21.50	0.50	2%
Confirmation of Food Business Registration	25.00	25.50	0.50	2%
Plans under copyright	9.00	9.00	0.00	0%
Plans: A0, A1 & A2 size	5.00	5.00	0.00	0%
Plans: A3 & A4 size	1.00	1.00	0.00	0%
Photocopying per A4 sheet	0.50	0.50	0.00	0%
Invoice request	22.00	22.50	0.50	2%
Recovery Fee - Dishonoured Cheque	30.00	30.50	0.50	2%
Home Improvement Agency				
HIA fee rate for professional services as an agent for a client in receipt of a disabled facilities grant or other building work	15% of the value of works plus ancillary costs	15% of the value of works plus ancillary costs		
Acting as an agent for a client who is privately funding building works:	Fee of 10% of the builders quotation plus ancillary costs	Fee of 10% of the builders quotation plus ancillary costs		
HIA fee rate for administrative services in support of a private sector housing grant application or privately funding building works	£230 plus VAT per application	£235 plus VAT per application	5.00	2%
HIA fee rate for the management of HRA funded adaptations schemes	15% flat fee per scheme £19 per hour, including VAT, plus the cost of materials used	15% flat fee per scheme £19 per hour, including VAT, plus the cost of materials used	0.00	0%
Small Repairs Service				
Supply and Fit Keysafe	47.00	48.00	1.00	2%
Supply and Fit Alert Keysafe (Within 1 working day)	59.00	60.00	1.00	2%
Street Trading Consents - subject to approval by General Purposes Licensing Committee				
City Centre & Late Night Traders				
Application Fee	310.00	315.00	5.00	2%
Annual consent (Pro Rata for period of Consent)	7,800.00	7,950.00	150.00	2%
Weekly Consent (Weekly Rota)	175.00	178.00	3.00	2%
All other traders				
Application Fee	310.00	315.00	5.00	2%
Annual consent (Pro Rata for period of Consent)	2,645.00	2,700.00	55.00	2%
Peripatetic traders (mobile traders- e.g. icecream vans, sandwich vans)				
Application fee	102.00	104.00	2.00	2%
Annual consent (Pro Rata for period of Consent)	1,375.00	1,400.00	25.00	2%
General Charges				
Replacement Consent	31.00	31.50	0.50	2%
Identification badge (per badge)	31.00	31.50	0.50	2%
Events				
Street Trading at event for commercial benefit (up to 5 days) - per stall	26.00	26.50	0.50	2%
Street Trading at event for commercial benefit (6-14 days) - per stall	42.00	43.00	1.00	2%
Street Trading at event for community / charity benefit	No Fee	No Fee		
Street Café Licences - subject to approval by General Purposes Licensing Committee				
Annual Fee	750.00	750.00	0	0%
NEW: Annual Neighbourhood Shopping Centre Fee based on location as per Local Plan	N/A	350.00		

Planning & Regulatory Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Miscellaneous Licensing - subject to approval by General Purposes Licensing Committee				
Acupuncture, ear piercing, electrolysis & tattooing (only payable on first registration - person)	113.00	115.00	2.00	2%
Acupuncture, ear piercing, electrolysis & tattooing (only payable on first registration - premises)	225.00	230.00	5.00	2%
Animal Boarding Establishment	180 + vet fees	183 + vet fees	3.00	2%
Dangerous Wild Animals	410 + vet fees	415 + vet fees	5.00	2%
Dog Breeding Establishment	180 + vet fees	183 + vet fees	3.00	2%
Pet Shop	180 + vet fees	183 + vet fees	3.00	2%
Riding Establishment	415 + vet fees	415 + vet fees	5.00	2%
Zoo	415 + vet fees	415 + vet fees	5.00	2%
HMO Licensing				
For the service of paper Notices by post	30.00	30.00	0.00	0%
Initial Application for a 1 year licence where the owner comes forward to licence voluntarily and is able to demonstrate that the property was acquired and operating as an HMO within the previous 12 weeks	400.00	408.00	8.00	2%
Initial Application for a 1 year licence where the owner has been found to be operating an unlicensed HMO for more than 12 weeks.	999.00	1,499.00	500.00	50%
Basic Annual Renewal to reflect need to re inspect due to poor management practices and non-compliance	357.00	365.00	8.00	2%
Basic Annual Renewal with no re-inspection necessary	187.00	191.00	4.00	2%
5 year or end of Scheme licence where landlord/agent meets criteria	300.00	307.00	7.00	2%
Renewal of an annual licence to a 2 year licence where landlord/agent meets criteria (no inspection required)	210.00	215.00	5.00	2%
Inspection to advise on requirements before property is licensed.	150.00	153.00	3.00	2%
Housing Act charges				
Charging for the service of Improvement Notices, Prohibition Orders or Hazard Awareness Notices under the Housing Act 2004.	500.00	510.00	10.00	2%
Charging for taking Emergency Remedial Action or serving an Emergency Prohibition Order under the Housing Act 2004.	595.00	607.00	12.00	2%
Charging for review of Suspended Improvement Notices or Suspended Prohibition Orders served under the Housing Act 2004.	300.00	306.00	6.00	2%
Other charges incurred in the determining of whether to serve a notice/make an order	Value of time spent based on hourly rate decided by Head of Planning and Regulatory Services + costs incurred Fee of 10% of the rent repaid to the tenant	Value of time spent based on hourly rate decided by Head of Planning and Regulatory Services + costs incurred Fee of 10% of the rent repaid to the tenant		
Rent repayment order service for tenants				

Planning & Regulatory Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Integrated Pollution Prevention & Control Permits				
LAPPC Charges - Industrial processes covered by Environmental Permitting Regulations	The fee for each application and renewal will be calculated in accordance with DEFRA guidance	The fee for each application and renewal will be calculated in accordance with DEFRA guidance		
Mobile Homes Act 2013				
New application	327.00	333.50	6.50	2%
Licence alterations application	300.00	306.00	6.00	2%
Depositing of site rules fee	110.00	112.00	2.00	2%
Transfer of licence application	327.00	333.50	6.50	2%
Copy of licence	25.00	25.50	0.50	2%
NEW: Existing operator annual licence				
Large (51+)				
Site inspections every 12 months (Cat A risk rating)	382.00	390.00	8.00	2%
Site inspections every 18 months (Cat B risk rating)	255.00	260.00	5.00	2%
Site inspections every 24 months (Cat C risk rating)	191.00	195.00	4.00	2%
Site inspections every 36 months (Cat D risk rating)	127.00	129.50	2.50	2%
Medium (11-50)				
Site inspections every 12 months (Cat A risk rating)	300.00	306.00	6.00	2%
Site inspections every 18 months (Cat B risk rating)	200.00	204.00	4.00	2%
Site inspections every 24 months (Cat C risk rating)	150.00	153.00	3.00	2%
Site inspections every 36 months (Cat D risk rating)	100.00	102.00	2.00	2%
Small (10 or less)				
Site inspections every 12 months (Cat A risk rating)	218.00	222.50	4.50	2%
Site inspections every 18 months (Cat B risk rating)	145.00	148.00	3.00	2%
Site inspections every 24 months (Cat C risk rating)	109.00	111.00	2.00	2%
Site inspections every 36 months (Cat D risk rating)	73.00	74.50	1.50	2%
Transferring/Replacing Licences & Certificates				
Other replacement licence	27.00	27.50	0.50	2%

Housing & Property Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
<u>Exempt from VAT</u>				
Weekly Charges				
Temporary Accommodation [Heat,Light,Cook] - 1 bed	15.20	15.50	0.30	1.97
Temporary Accommodation [Heat,Light,Cook] - 2 bed	16.00	16.00	0.00	0.00
Temporary Accommodation [Heat,Light,Cook] - 3 bed	18.00	19.00	1.00	5.56
Temporary Accommodation [Heat,Light,Cook] - 4 bed	25.00	25.00	0.00	0.00
Temporary Accommodation Rent - 1 bed	204.34	144.34	(60.00)	(29.36)
Temporary Accommodation Rent - 2 bed	236.54	176.54	(60.00)	(25.37)
Temporary Accommodation Rent - 3 bed	266.66	206.66	(60.00)	(22.50)
Temporary Accommodation Rent - 4 bed	335.19	275.19	(60.00)	(17.90)
Temporary Accommodation [Water & Sewerage] - 1 bed	5.30	5.30	0.00	0.00
Temporary Accommodation [Water & Sewerage] - 2 bed	6.50	6.00	(0.50)	(7.69)
Temporary Accommodation [Water & Sewerage] - 3 bed	9.20	8.50	(0.70)	(7.61)
Temporary Accommodation [Water & Sewerage] - 4 bed	12.50	11.00	(1.50)	(12.00)
Nightly Charge Rent - Any unit size with no kitchen	160.38	160.38	0.00	0.00
<u>Exempt from VAT (before discounts)</u>				
Council tenant	13.85	14.85	1.00	7.22
Council tenant Premium	15.95	16.95	1.00	6.27
Blue badge council	13.85	14.85	1.00	7.22
Blue badge council Premium	15.95	16.95	1.00	6.27
Mobility council	13.85	14.85	1.00	7.22
Mobility council Premium	15.95	16.95	1.00	6.27
Garage with in curtiledge	13.85	14.85	1.00	7.22
Replacement lost/damaged permit	-	15.00	N/A	N/A
<u>VATable (before discounts)</u>				
Private tenant	13.85	14.85	1.00	7.22
Private tenant Premium	15.95	16.95	1.00	6.27
Blue badge private	13.85	14.85	1.00	7.22
Blue badge private Premium	15.95	16.95	1.00	6.27
Mobility private	13.85	14.85	1.00	7.22
Mobility private Premium	15.95	16.95	1.00	6.27
Replacement lost/damaged permit	-	15.00	N/A	N/A
<u>Exempt from VAT (before discounts)</u>				
Parking spaces	13.49	14.49	1.00	7.41
Parking spaces (Blue Badge)	13.49	14.49	1.00	7.41
Replacement lost/damaged permit	-	15.00	N/A	N/A
<u>VATable (before discounts)</u>				
Parking spaces Private	13.49	14.49	1.00	7.41
Replacement lost/damaged permit	-	15.00	N/A	N/A

Housing & Property Fees & Charges 2017/18

	2016/17 Charge	2017/18 Charge	Increase/ (Decrease)	Increase/ (Decrease)
	£	£	£	%
Estate Management Fees and Charges				
Acquisition or Leasing of Leasehold property				
Rent up to £9,999 per annum	2,250.00	2,250.00	0.00	0.00
Rent between £10,000 and £49,999 p.a.	2,750.00	2,750.00	0.00	0.00
Rent between £50,000 and £99,999 p.a.	4,000.00	4,000.00	0.00	0.00
Rent over £100,000 p.a.	8,500.00	8,500.00	0.00	0.00
Settlement of Rent Reviews and Lease Renewals of Leasehold property				
Rent up to £9,000 per annum	1,000.00	1,000.00	0.00	0.00
Plus additional %age:				
On the rent between £10,000 and £49,999 p.a.	1,250.00	1,250.00	0.00	0.00
On the rent between £50,000 and £149,999 p.a.	1,250.00	1,250.00	0.00	0.00
On the rent over £150,000 p.a.	1,250.00	1,250.00	0.00	0.00
Acquisition or Disposal of Freehold property				
Capital value up to £99,999	2,750.00	2,750.00	0.00	0.00
Capital value between £100,000 and £499,999	4,500.00	4,500.00	0.00	0.00
Capital value between £500,000 and £2 million	10,000.00	10,000.00	0.00	0.00
Capital value over £2 million	12,500.00	12,500.00	0.00	0.00
Valuation of Leasehold and Freehold property				
Rental value up to £9,999 per annum	1,000.00	1,000.00	0.00	0.00
Rental value between £10,000 and £49,999 p.a.	1,000.00	1,000.00	0.00	0.00
Rental value between £50,000 and £99,999 p.a.	1,000.00	1,000.00	0.00	0.00
Rental value over £100,000 p.a.	1,000.00	1,000.00	0.00	0.00
Capital value up to £99,999	1,000.00	1,000.00	0.00	0.00
Capital value between £100,000 and £499,999	1,550.00	1,550.00	0.00	0.00
Capital value between £500,000 and £2 million	2,650.00	2,650.00	0.00	0.00
Capital value over £2 million	5,250.00	5,250.00	0.00	0.00
Consents				
To Assignments and Subletting	800.00	800.00	0.00	0.00
Alteration of Lease terms or consent for alterations	800.00	800.00	0.00	0.00
If both an alteration and alienation	1,300.00	1,300.00	0.00	0.00
Administration fee for consent (in relation to restrictive covenants)	275.00	275.00	0.00	0.00
Administration fee for preparation of access licences and similar agreements (Minimum charge)	200.00	200.00	0.00	0.00
For work based on a time charge: Hourly Rate £100 / hour				

This page is intentionally left blank

BUDGET REPORT RISK IMPLICATIONS 2017/18 TO 2020/21

Risk ID	Risk						Gross Risk		Current Risk		Residual Risk		Risk Mitigation
	Risk Title	Opportunity/Threat	Risk Description	Risk Cause	Consequence	Date raised	I	P	I	P	I	P	
B1	Business Rates Income	Threat	Business rates income less than expected	Volatility in business premises closing or being developed; Business Rates appeals being higher than anticipated	Less council funding	1-Dec-16	4	3	4	3	4	2	Monitor monthly
B2	Welfare Reforms	Threat	Welfare Reforms may affect the authority more adversely than estimated	Changes in the administration and provision of welfare benefits will impact adversely on the authority	Increased arrears, possible redundancy payments for council, impact on homelessness	1-Dec-16	4	3	4	3	4	2	Provisions and Contingency within the budget, respond to consultation, reassess spending requirements in line with reduced service provision
B3	New Homes Bonus	Threat	The potential for the variation in the New Homes Bonus. This is based on estimated numbers of new dwellings constructed and occupied during a given 12 months period, clearly this will be subject to variation . Additionally there will be changes in the allocation of NHB, which are as yet unknown	Fluctuations in house building will affect amount of bonus paid	Reduced New Homes Bonus	1-Dec-16	4	3	4	3	4	2	Reduce Capital Programme
B4	Investment interest	Threat	Actual interest rates and investment returns being lower than projected	Economic climate	Reduced investment income	1-Dec-16	3	2	3	2	3	2	Interest rates are already low therefore only moderate impact. Monitor and ensure placing investments in high credit rated agencies. There is a higher level of risk associated with property investment funds which is mitigated through the use of earmarked reserves.
B5	Efficiencies	Threat	Any further slippage in the delivery of savings and efficiencies, especially around trading or additional pressures on the 2016-17 budget that could impact	Changes in circumstances make savings unattainable	Reduced efficiencies increased overspend on net budget	1-Dec-16	3	3	3	3	3	2	Monitor monthly, take corrective action if problem identified. Use contingencies within the budget to cover high and medium risks

151

Risk ID	Risk						Gross Risk		Current Risk		Residual Risk		Risk Mitigation
	Risk Title	Opportunity/Threat	Risk Description	Risk Cause	Consequence	Date raised	I	P	I	P	I	P	
B6	Formula Grant	Threat	Monitor. Figures based on CSR 2015. Although figures supplied are for a 4 year period there is an opt in process which requires the authority to submit an efficiency strategy the details of which are currently unknown. Even then the figures can change if the Government encounters fiscal pressures	Government settlement figures less than estimated or efficiency statement is not sufficient	Reduced income	1-Dec-16	3	3	3	3	3	2	Annual review of position and adjust budget accordingly
B7	Increased Right to Buy sales	Threat	Variations in numbers of RTB's adversely affects HRA	Increase in discount to maximum of £75k.	A decrease in the numbers of RTB's will lead to less capital receipts to fund the Capital Programme. Conversely an increase the numbers of RTBs would lead to a revenue pressure from reduced rental	1-Dec-16	4	3	4	2	4	2	Track situation and either re-prioritise spend or use additional borrowing headroom
B8 152	Robustness of Estimates	Threat	The revenue and capital estimates vary from estimated and planned. The implications of Government policy impact more adversely than anticipated.	Fluctuations in prices and reduced income	Potential overspend	1-Dec-16	4	3	3	2	3	2	Robust monthly budget monitoring to detect variations and put in mitigating action. Adequate reserves, balances and contingencies within the budget to cover where mitigation is insufficient.
B9	Capital Receipts	Threat	Asset disposals are not secured or fall short of target amount	Economic climate or inability to negotiate deals	Insufficient resources to fund capital programme	1-Dec-16	4	3	4	3	4	2	Robust monthly monitoring, consider prudential borrowing to fund shortfall or defer projects
B10	Additional trading income not achieved	Threat	Budget includes turnover from external trading activities of around £5. million to £8 million per annum	Unable to compete for external contracts; contingencies in the budget are only on the marginal changes to the budget and not the underlying activity brought forward	MTFP adversely affected through loss of contributions to overheads resulting in potential business restructuring	1-Dec-16	4	3	4	3	4	2	Monitor situation; restructure the service and reduce workforce and equipment to match reduced activity, using corporate reserves to finance costs; use budgeted contingency to contribute towards the overheads
B11	Savings not achieved	Threat	Savings in budget may not be achieved	Service pressures	Potential overspend	1-Dec-16	3	3	3	3	3	2	Monitoring
B12	Slippage in Capital Programme	Threat	Schemes in Capital Programme do not start or finish on time	Contract delays or increased variations	Impact on delivery of Council priorities	1-Dec-16	3	3	3	3	3	2	Robust monthly monitoring of programme, introduction of Capital Gateway Process and flexible treasury management strategy

Risk ID	Risk						Gross Risk		Current Risk		Residual Risk		Risk Mitigation
	Risk Title	Opportunity/Threat	Risk Description	Risk Cause	Consequence	Date raised	I	P	I	P	I	P	
B13	Cuts by Partner Organisations	Threat	Reductions in budget spend by partner organisations such as the County Council impact adversely on the City Council	A reduction in supporting people spend or grants to external agencies force homeless families towards the City Council and consequent financial	Increased spend by City Council	1-Dec-16	4	3	4	3	4	2	Discussions with partner organisations and others to mitigate impact
B15	Reduced Capital receipts	Threat	Reduced RTB receipts from reduced sales and other capital receipts from land and asset disposals reduce amount of funding available to fund capital	Reduced sales	Reduced capital programme	1-Dec-16	3	3	3	3	3	2	Monitor and adjust capital programme accordingly
B15	HVCH Levy	Threat	Levy on High Value Council Houses more than budgeted	Government policy	Impact on delivery of Council priorities	1-Dec-16	5	3	4	3	4	2	Contingency established

This page is intentionally left blank

Oxford City Council Budget Medium Term Financial Strategy 2017-18 to 2020-2021 and 2017-18 Budget for Consultation (Equality Assessment)

The following assessment gives more details from an equality and diversity perspective on the Council's various on-going budget proposals. It provides an initial commentary, incorporating input from Heads of Service and specialist officers, to indicate the potential risks and actual mitigating actions already in place or planned to support the investment proposals before the wider public consultation period from December 2016 to January 2017.

The draft budget has been structured so that it is in balance for the next four years, and although post Brexit national economic pressures on local government are ever present, it recommends revisions, efficiencies and small reductions in service but aims to protect frontline services as far as possible, particularly for the most vulnerable. Despite an assumption of zero central government revenue support grant funding by 01/04/2019 it also includes efficiencies, increased income and service charges and outlines proposals to facilitate capital investment for large scale regeneration projects which will bring economic growth, jobs, more decent homes and wider interventions to ensure social inclusive communities and opportunities: underpinning the Council's vision of "Building a World Class City for Everyone".

Amendments raised by the City Executive Board discussions and public consultation will be reflected in the final working document.

Budget Proposal	Increase Council Tax by an expected 1.99% for 2017/18 followed by subsequent annual increases of 1.99%, and maintain the existing Council Tax Support Scheme
Is this proposal new or subject to an annual review?	<p>This is an annual consideration. The Autumn 2012 national budget statement lowered the local authority tax referendum threshold to 2%. It is expected that as in previous years a one year freeze grant will be available to local authorities that freeze their council tax at the previous years' level, equivalent to the product of a 1% increase. Given the loss of revenue to the council in the current and following years the recommendation is for the council to increase council tax up to the maximum level at which a referendum is not required. The current assumptions are for a 1.99% council tax rise 2017/18 followed by increases of 1.99% thereafter on the basis that levels higher could be capped by the Government</p> <ul style="list-style-type: none"> An increase in the Band D Council Tax of 1.99% or £5.66 per annum representing a Band D Council Tax of £290.19 per annum
What are the likely risks?	Council Tax rises are likely to have the hardest impact on the most economically disadvantaged groups such as part time and low paid workers (although these are mitigated by the council tax

	<p>support scheme, which is being maintained in full).</p> <ul style="list-style-type: none"> Increased arrears due to benefit changes arising from the roll out of universal credit 						
What public consultation has been planned/ taken place?	There will be further opportunities for comment on the level of council tax increase and the Council Tax Support Scheme as part of the public consultation in January 2017.						
What mitigating actions will the Council implement to offset any negative impacts?	The City Executive Board agreed in October 2016 the existing Council Tax Reduction Scheme on the same basis as that introduced on 1st April 2013. This, in essence, continues the previous level of entitlement provided by Council Tax Benefit, and has not passed on the reduction in government funding for council tax relief to those on the lowest incomes in the city. It is estimated the scheme will cost the Council £970k in 2017/18, with the full cost of the scheme of £1.6 million being borne by the Council when the Revenue Support Grant is reduced to zero with effect from 01/04/2019.						
Overall assessment of the equality risks	<ul style="list-style-type: none"> It is difficult to estimate the dimensions of equalities risks around CT increases. The Council has put in place proportionate mitigating actions such as the CT Support Scheme and the work of the Welfare Reform Team to protect the most vulnerable and economically challenged communities across Oxford. Currently the total net caseload is 12,422 receiving Council Tax Benefit & Housing Benefit, with 75% of those receiving CT benefit on full benefit and therefore the 1.99% increase will have no effect. Of the remaining 25% in receipt of some benefits those hardest hit are likely to be in part time or low paid work and will be variably impacted on a case-by-case basis. This means that the remaining 48,000 CT payers will be directly affected by the increase. 						
	<table border="0" style="width: 100%; text-align: center;"> <tr> <td style="width: 33%;">Race</td> <td style="width: 33%;">Disability</td> <td style="width: 33%;">Age</td> </tr> <tr> <td>Neutral</td> <td>Neutral</td> <td>Neutral</td> </tr> </table>	Race	Disability	Age	Neutral	Neutral	Neutral
Race	Disability	Age					
Neutral	Neutral	Neutral					

	Gender reassignment	Religion or Belief	Sexual Orientation																												
	Neutral	Neutral	Neutral																												
	Sex	Pregnancy and Maternity	Marriage & Civil Partnership																												
	Neutral	Neutral	Neutral																												
Budget Proposal	Rent setting: Decrease in council house rents by 1% per annum for the next three years and then by CPI +1%																														
Is this proposal new or subject to an annual review?	<p>The Welfare Reform and Work Bill introduced a policy with effect from April 2016 that social housing rents must be reduced by 1% per year for 4 years from their 8 July 2015 position.</p> <ul style="list-style-type: none"> • Rents in social housing to be reduced by 1% a year for four years. Local authorities and housing associations will need to find efficiencies to fund the rent reductions • Forced Sale of High Value Council Housing (HVCH) • Associated rates of housing benefit capped at the relevant local housing allowance 																														
What are the likely risks?	<p>The Government have given no indication about what rental policy can be adopted thereafter. In the absence of any guidance the assumption is that the Council will adopt a rent strategy that will move rents to target rent over a four year period between 2020/21 and 2023/24. Thereafter rents will be increased by the Governments previous guideline of CPI + 1%. The impact on rents for 2017/18 and summary for the next four years is shown in the table below:</p> <table border="1"> <thead> <tr> <th colspan="4">Table 9 : Effect of Rent Changes on Average Rent 2017/18 to 2020/21</th> </tr> <tr> <th></th> <th>Change</th> <th>Average weekly change</th> <th>Average weekly Rent</th> </tr> <tr> <th></th> <th>%</th> <th>£</th> <th>£</th> </tr> </thead> <tbody> <tr> <td>2017/18</td> <td>**(-0.89)</td> <td>(0.95)</td> <td>105.65</td> </tr> <tr> <td>2018/19</td> <td>**(-0.87)</td> <td>(0.92)</td> <td>104.73</td> </tr> <tr> <td>2019/20</td> <td>**(-0.87)</td> <td>(0.92)</td> <td>103.82</td> </tr> <tr> <td>2020/21</td> <td>4.04</td> <td>4.19</td> <td>108.01</td> </tr> </tbody> </table>			Table 9 : Effect of Rent Changes on Average Rent 2017/18 to 2020/21					Change	Average weekly change	Average weekly Rent		%	£	£	2017/18	**(-0.89)	(0.95)	105.65	2018/19	**(-0.87)	(0.92)	104.73	2019/20	**(-0.87)	(0.92)	103.82	2020/21	4.04	4.19	108.01
Table 9 : Effect of Rent Changes on Average Rent 2017/18 to 2020/21																															
	Change	Average weekly change	Average weekly Rent																												
	%	£	£																												
2017/18	**(-0.89)	(0.95)	105.65																												
2018/19	**(-0.87)	(0.92)	104.73																												
2019/20	**(-0.87)	(0.92)	103.82																												
2020/21	4.04	4.19	108.01																												

Forced Sale of High Value Council Housing (HVCH) levy

Local authority landlords will be forced to sell their highest value dwellings once they became void. The receipts generated, after allowing for some deductible expenditure and an estimate for associated debt would be handed back to the Government to compensate Housing Associations for the discounts associated with extending RTB to their tenants who hold assured tenancies.

The recent published Housing and Planning Bill suggests that HVCH payments to Government will now “not” be based on actual sales but on a formula driven methodology in addition recent ministerial announcements have confirmed that the levy will not be implemented in 2017-18 as originally planned. This means that payments will be required irrespective of whether the Council has generated an actual capital receipt. So all the financial risk of funding this initiative now sits with the Council. The fundamentals as to how the formula will work that would allow some calculations of the likely effect on the finances of the HRA are as yet still unknown.

- An amount of £23.1 million has been estimated as the amount of levy payment over the next four years. This is based on the estimated number of high value dwellings that may become void over this period although in the absence of the Governments formula it is difficult to know for certain how accurate this is. Setting aside an amount in this manner should mitigate the need to dispose of dwellings to fund the levy in the short to medium term.

The main risk is therefore that:

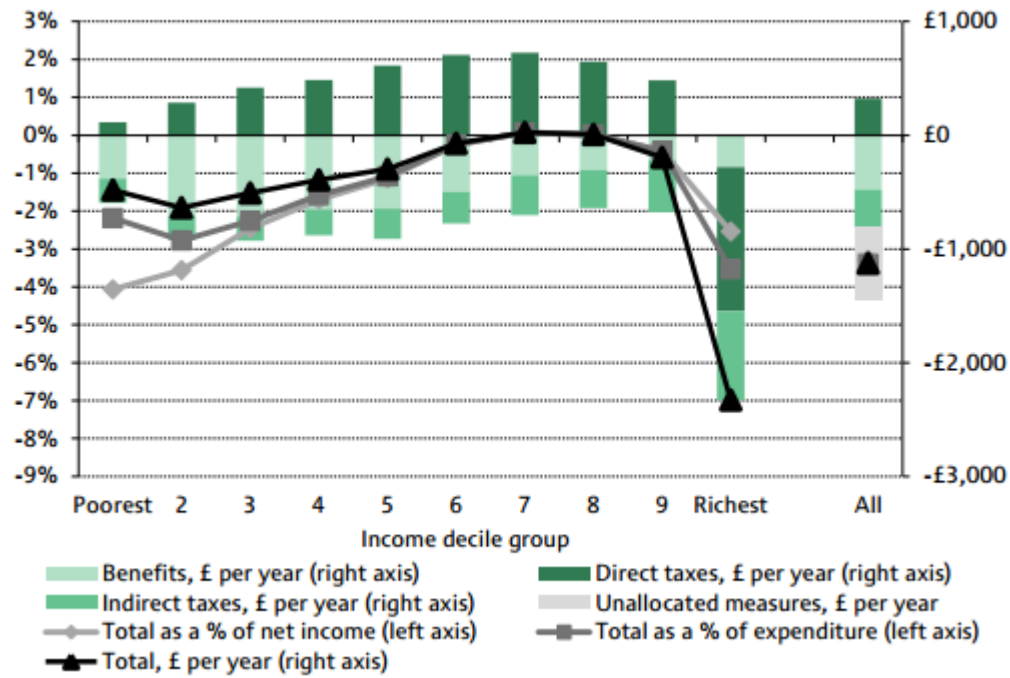
- Liability arising from forced the sale of High Value Council Housing (HVCH) is more than estimated

Right to Buy and other disposals

Disposals of around 40 dwellings per year until 2021/22 are assumed due to the Government’s re-invigorating Right to Buy initiative. Additionally the plan allows for 5 properties to be transferred to the Housing Company which the Council is able to do without Secretary of States approval under Section 32 of the Housing Act 1985 (as amended) and set out in the DCLG’s General Housing Consents

	<p>The main risk is therefore that:</p> <ul style="list-style-type: none"> • Non-achievement of assumed Right-to-Buy sales now required to fund the increased capital spend commitments <p>Welfare Reform</p> <p>From 7 November 2016 the reduction in the Benefit Cap from £26,000 to £20,000 was introduced. This is estimated to affect 300-350 households in Oxford with over £1m annually being cut from the housing benefit of those affected. The Council's Welfare Reform Team have been engaging with people likely to be affected by this measure prior to it being implemented, and will be making use of the Council's Discretionary Housing Payment grant to provide financial support whilst they are helped to find long term solutions. The Council's DHP grant is likely to increase in 2017/18 as the national budget will increase from £150m to £185m, so there will be scope for the Welfare Reform Team to provide temporary financial support to those who need it.</p> <p>Universal Credit</p> <p>On the 16th November the Department for Work & Pensions provided local authorities with the timetable for the extension of Full Service Universal Credit into job centres. The end date has been given as September 2018 with Oxford being October 2017. There will be further announcements in early December on funding arrangements for Universal Credit delivery and Housing Benefit support. Within the Council budget, provision has been made for changes arising from Universal Credit which will impact on staffing. Whilst the staffing reductions should only be made after the roll out, to allow for dealing with any adverse workloads should the December announcements confirm a different position with regard to subsidy this will be changed accordingly in the February Budget report to Council.</p>
What public consultation has been planned/ taken place?	Agree to consult on an increase in council rents and service charges through special focus groups of council tenants/ leaseholders
What mitigating actions will	1. Given the uncertainties around the Governments HVCH initiative it is prudent to create a

<p>the Council implement to offset any negative impacts?</p>	<p>contingency for the Council to meet the potential cost. This contingency, produced from reductions in the HRA Capital Programme is in the order of £23.1 million. All the financial risk of this initiative will be borne by the Council's HRA</p> <ol style="list-style-type: none"> 2. The reduction in the Benefit Cap from £26,000 to £20,000, a freezing of most benefits (including Local Housing Allowance rates) and a number of technical amendments to Housing Benefit, Tax Credits and Universal Credit to be introduced over the next two years has seen the Council's Welfare Reform Team is supporting customers affected by these measures. There is a residual risk that Welfare Reform/ Universal Credit impacts the authority more adversely than assumed 3. The rate of housing benefit in the social sector will be capped at the relevant local housing allowance. Whilst officers are currently looking at the impact it is likely that it will negatively impact those under 35 in our and RSL properties, around 1,180 of our tenants 4. Debt Management Strategy: The first £20m self- financing loan is due for repayment on 31 March 2021. Last year it was agreed that this payment would be deferred which would generate an initial saving of £20m offset by the additional annual interest cost of approximately £0.658m. The overall strategy is to repay debt when possible allowing for commitments to be financed whilst maintaining a minimum HRA working balance of £3.5 million
<p>Overall assessment of the equality risks</p>	<p>Overall, and particularly because of the combination of high levels of deprivation in parts of Oxford, and also very high housing costs, Oxford City Council remains especially exposed to adverse financial pressures resulting from rent reduction, HVCH and the range of welfare reforms. The totality of changes to the tax and benefits system, shown in the table below (this is for 2015/16 from the Institute for Fiscal Studies). People in the bottom two deciles are likely to receive a full rebate on their Council Tax bills. Therefore it is people in the next 2 or 3 deciles who are likely to run into additional arrears, as they are far less likely to be getting help with their Council Tax but are still taking a hit from benefit changes. The Centre for Regional Economic and Social Research (based at Sheffield Hallam University) have shown that the government's welfare reforms from 2010 to 2015 reduced benefit payments in Oxford by £29.7 million cumulatively. They have also predicted that measures announced since 2015 will further reduce benefit payments by £19m by 20/21.</p>



Race
Neutral/ Negative

Disability
Negative

Age
Negative

Gender reassignment
Neutral

Religion or Belief
Neutral

Sexual Orientation
Neutral

Sex
Neutral

Pregnancy and Maternity
Neutral

Marriage & Civil Partnership
Neutral

Budget Proposal	Increase in council housing service charges						
Is this proposal new or subject to an annual review?	<p>Service charges such as caretaking, cleaning, CCTV, communal areas etc. have been increased in line with the convergence formula in previous years. The Council agreed to remove any associated service charge limiter (credits) over a 4 year period limited to a maximum of £1/wk. It is estimated that this will deliver £50k of additional income by 2017/18 at which time the limiter will have been removed from all associated accounts. A review of the service charge budgeted income suggests that the base budget can be increased by around £300k per annum and this has been reflected in the revised budget.</p> <p>There is a regular review of leaseholder charges (caretaking, cleaning, CCTV, communal areas) and these will be linked to increases in the RPI.</p>						
What are the likely risks?	The Council will need to determine the greatest areas of disadvantage and whether any specific protected groups are placed more at risk						
What public consultation has been planned/ taken place?	Agree to consult on an increase in council rents and service charges through special focus groups of council tenants/ leaseholders						
What mitigating actions will the Council implement to offset any negative impacts?	The proposal will remove inequity/ anomalies that tenants living side by side and in receipt of the same benefits associated with service charges are being charged different amounts. Tenants in receipt of HB will see the service charge increases covered.						
Overall assessment of the equality risks	<p>Strong governance and review will mitigate against any adverse impacts, although none have been flagged</p> <hr/> <table style="width: 100%; border: none;"> <tr> <td style="text-align: center; width: 33%;">Race</td> <td style="text-align: center; width: 33%;">Disability</td> <td style="text-align: center; width: 33%;">Age</td> </tr> <tr> <td style="text-align: center;">Neutral</td> <td style="text-align: center;">Neutral</td> <td style="text-align: center;">Neutral</td> </tr> </table>	Race	Disability	Age	Neutral	Neutral	Neutral
Race	Disability	Age					
Neutral	Neutral	Neutral					

	Gender reassignment	Religion or Belief	Sexual Orientation
	Neutral	Neutral	Neutral
	Sex	Pregnancy and Maternity	Marriage & Civil Partnership
	Neutral	Neutral	Neutral
Budget Proposal	Increases in Fees and Charges across Council services		
Is this proposal new or subject to an annual review?	<p>The Medium Term Financial Strategy for the next four years allows for fees and charges to increase over the medium term resulting in increased income of around £2.3 million by 2020-21. In 2017-18 there are increases in the areas shown below (details of which will appear in the main CEB Budget report):</p> <ul style="list-style-type: none"> i. An increase in garden waste bins of £2 per bin per year ii. Pre-application advice for planning services -3% - 8% iii. Leisure activities <ul style="list-style-type: none"> • Swimming – 5p – 1.1% • Adult gym – 15p – 1.9% • Skating - 15p 1.88% • Tennis – reduction £1 14% iv. Pest Control increases range from £5 to £20 for treatments to more be more reflective of the actual cost of the service v. Cemeteries increases range from 1.0% to 2.0% - £10 to £20 vi. Off street Car Parking –Most car parks no increase vii. Garages - £1 per week (7% increase across the aboard). viii. Park and Ride - Rising from £2 to £3 per day 		
What are the likely risks?	The Council has recognised that affordability of services is a significant problem for those in receipt		

	<p>of benefits. It has built in protections accordingly: with c. 2400 residents (accounting for 23.5% of all service users) receiving free garden waste services. Given the current economic climate for the public sector the ability to sustain this free service will be reviewed but any proposal to change would seek to minimise the impact on vulnerable communities. It remains an aim to maintain a universal and free service wherever possible and to minimise the impact of any charging to minimal or zero levels for those in receipt of benefits. Previous charges for garden waste collection services have been set below market rates. Note also that over 1000 residents receive assisted collections and that cases are reviewed annually.</p>
<p>What public consultation has been planned/ taken place?</p>	<p>Budget consultation annually (December 2016/ January 2017).</p>
<p>What mitigating actions will the Council implement to offset any negative impacts?</p>	<p>The Council gives concessions to customers that are in receipt of Housing Benefit in the following areas:</p> <ul style="list-style-type: none"> • Bonus Concessionary Leisure Card – qualifying benefits such as : Job seeker’s allowance, Unemployed / interim payment, Youth training courses / new deal, Income support, Housing benefit, Council Tax benefit, Pension credit, Asylum Seeker, Invalid Care Allowance, Employment and Support Allowance, Attendance Allowance, Personal Independence Payment (PIP) - Disability Living Allowance, NHS: AG2, AG3, HC2 or HC3 Certificate holders, and Foster Carers • Free Swimming for children under 17 at various sessions during the week • Free one off winter garden clearance for council tenants in receipt of Council tax reduction or housing benefit and physically unable to carry out work • A range of pest control visits for mice, rats, wasps, ants, moths, fleas, squirrels and other pests where the customer is in receipt of Housing Benefit • Garden waste collection where customer is in receipt of benefit <p>Each Council service area proposing fee increases will undertake a separate analysis of service</p>

	<p>users (where identifiable) to assess any issues of potential adverse impact.</p> <p>All fees and charges have been applied across the board. In many cases, the small increases being proposed follow a period where no increases were applied. Where statutory provisions allow, discretionary reductions will be applied to be both responsive to and influence best practice around compliance (rewarding high standards).</p> <p>With the withdrawal of Housing Benefit in favour of Universal Credit, it will not be possible to identify all such benefits and whilst the numbers on Universal Credit are limited at present they will grow over the next 12-18 months. It is therefore recommended that concessions for the fees and charges identified above are granted where claimants are either in receipt of Housing Benefit, Council Tax Reduction Scheme, Universal Credit, or in the case of leisure concessions for the allowances identified above until such time as those benefits are phased out.</p>									
Overall assessment of the equality risks	<p>There may be groups adversely affected by specific service fees, however, consultation and monitoring will take place with these groups once identified.</p> <table border="1" data-bbox="618 820 2047 1225"> <tr> <td data-bbox="618 820 1120 916">Race Neutral</td> <td data-bbox="1120 820 1621 916">Disability Neutral</td> <td data-bbox="1621 820 2047 916">Age Neutral</td> </tr> <tr> <td data-bbox="618 1011 1120 1107">Gender reassignment Neutral</td> <td data-bbox="1120 1011 1621 1107">Religion or Belief Neutral</td> <td data-bbox="1621 1011 2047 1107">Sexual Orientation Neutral</td> </tr> <tr> <td data-bbox="618 1123 1120 1225">Sex Neutral</td> <td data-bbox="1120 1123 1621 1225">Pregnancy and Maternity Neutral</td> <td data-bbox="1621 1123 2047 1225">Marriage & Civil Partnership Neutral</td> </tr> </table>	Race Neutral	Disability Neutral	Age Neutral	Gender reassignment Neutral	Religion or Belief Neutral	Sexual Orientation Neutral	Sex Neutral	Pregnancy and Maternity Neutral	Marriage & Civil Partnership Neutral
Race Neutral	Disability Neutral	Age Neutral								
Gender reassignment Neutral	Religion or Belief Neutral	Sexual Orientation Neutral								
Sex Neutral	Pregnancy and Maternity Neutral	Marriage & Civil Partnership Neutral								
Budget Proposal	New Homes Growth Bonus Payments									
Is this proposal new or subject to an annual review?	A system introduced by central government in 2011/12 to pay grant based on the net growth in housing. This grant is now proposed to be given for a four year period (following government consultation in 2015) based on new dwelling completions in year. The Council allocates New Homes									

	Bonus to fund the Capital Programme in order to de-risk the Medium Term Financial Strategy. The Council forecasts around £1.3 million NHB in 2017/18 (a decrease of around 55%) but small growth in the remaining three years of the MTFP																		
What are the likely risks?	The net growth in housing and affordable homes will have a positive impact on regeneration projects and impact strongly on groups in receipt of benefits and in work but on lower incomes; supporting strategic housing and other local economic growth priorities through Local Enterprise Partnerships																		
What public consultation has been planned/ taken place?	The Council will monitor potential growth estimates until 2020/21																		
What mitigating actions will the Council implement to offset any negative impacts?	No further New Homes Bonus has been assumed for 2018/19 and beyond. This is no change on the previous year's assumption.																		
Overall assessment of the equality risks	<p>The main risk is that the grant is lower than estimated or ceases altogether. A mitigating action could be to reduce the council's Capital Programme</p> <ul style="list-style-type: none"> As with Revenue Support Grant should New Homes Bonus be received in 2019/20 and 2020/21 then it is recommended that Members decide on appropriate use on one-off schemes. <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <tr> <td style="text-align: center;">Race</td> <td style="text-align: center;">Disability</td> <td style="text-align: center;">Age</td> </tr> <tr> <td style="text-align: center;">Neutral</td> <td style="text-align: center;">Neutral</td> <td style="text-align: center;">Neutral</td> </tr> <tr> <td style="text-align: center;">Gender reassignment</td> <td style="text-align: center;">Religion or Belief</td> <td style="text-align: center;">Sexual Orientation</td> </tr> <tr> <td style="text-align: center;">Neutral</td> <td style="text-align: center;">Neutral</td> <td style="text-align: center;">Neutral</td> </tr> <tr> <td style="text-align: center;">Sex</td> <td style="text-align: center;">Pregnancy and Maternity</td> <td style="text-align: center;">Marriage & Civil Partnership</td> </tr> <tr> <td style="text-align: center;">Neutral</td> <td style="text-align: center;">Neutral</td> <td style="text-align: center;">Neutral</td> </tr> </table>	Race	Disability	Age	Neutral	Neutral	Neutral	Gender reassignment	Religion or Belief	Sexual Orientation	Neutral	Neutral	Neutral	Sex	Pregnancy and Maternity	Marriage & Civil Partnership	Neutral	Neutral	Neutral
Race	Disability	Age																	
Neutral	Neutral	Neutral																	
Gender reassignment	Religion or Belief	Sexual Orientation																	
Neutral	Neutral	Neutral																	
Sex	Pregnancy and Maternity	Marriage & Civil Partnership																	
Neutral	Neutral	Neutral																	

Budget Proposal	Significant pressures on the Council's ability to deliver a balanced MTFP:
Is this proposal new or subject to an annual review?	Investment interest: The Bank of England cut base rate from 0.5% to 0.25% in August 2016. Predictions are that rates will be reduced again to 0.1% in the first quarter of 2017 and remain at this level until they slowly begin to rise from September 2018. For the first half year of 2016-17 our average investment rate was 1.07% bolstered by £10million of investments in property funds. Forecasts of interest rates in the MTFP range from 0.2% to 0.5% for the next four years with income reducing by approximately £200k per annum to that previously forecast.
What are the likely risks?	<ul style="list-style-type: none"> • Variations of actual income and expenditure against budget especially in volatile areas such as income • The Financial Settlement is not as favourable as is assumed in the above figures • Business Rates income is lower than forecast • Welfare Reform impacts the authority more adversely than assumed • Variation in the income from New Homes Bonus as a result of new dwellings constructed and occupied during a given 12 months period is lower than anticipated • Interest rates lower than projected • Slippage or non-delivery of savings and income generation assumptions, or additional pressures arise that have an on-going financial impact on the Council • Service pressures particularly in the area of homelessness, impose unfunded additional costs
What public consultation has been planned/ taken place?	Budget consultation annually (December 2016/ January 2017)
What mitigating actions will the Council implement to offset any negative impacts?	<ul style="list-style-type: none"> • Set against a background of economic/ financial uncertainty Members have exercised constraint in terms of adding ongoing new items of expenditure into the budget from 2017-18. • The budget assumes transfers to and from the working balance which as at 1/4/2016 were £3.620 million; the minimum level recommended by the Councils Chief Financial Officer that the Council should hold. Over the four year period of the MTFP there is an additional

	<p>contribution to the working balance of around £187k</p> <ul style="list-style-type: none"> • In a change to previous years policy contingencies held against efficiencies, fees and charges and service reduction proposals has been reduced to 30% of those identified as high risk as opposed to 40% of medium and high risks. This seems financially prudent given that the Council has had good track record of delivering such savings • Last year Oxford City Council opted to enter the Business Rates distribution Pool. The current forecast is an additional £350k of business rates income as a result of this decision. This position is reviewed annually and since the decision needs to be made relatively quickly as in previous years it is recommended that this decision is delegated to the Head of Financial Services, in consultation with the Board Member for Finance and Assets • In March 2016 the City Council approved the establishment of a Local Authority housing company and the company was incorporated in June 2016. The Company Business Plan set out plans to undertake the purchase and management of affordable rented homes at Barton, the development of new affordable and market housing, the purchase of 5 void properties from the HRA and estate re-generation in The Leys and Barton. The Council gave approval to make loans to the Housing Company for the acquisition of houses at Barton Park in 2016-17 for £12.270 million • The Council has a 50/50 partnership with Nuffield University to undertake the development of the land at Oxwed. The Council has already approved loans totalling £4.1 million as the Councils 50% share of the cost of purchasing land in December 2017 for which the Council will receive a capital receipt from the Company. 		
Overall assessment of the equality risks	<p>Race Neutral</p>	<p>Disability Neutral</p>	<p>Age Neutral</p>
	<p>Gender reassignment Neutral</p>	<p>Religion or Belief Neutral</p>	<p>Sexual Orientation Neutral</p>

	Sex Neutral	Pregnancy and Maternity Neutral	Marriage & Civil Partnership Neutral
Budget Proposal	Value for Money & Efficiency		
Is this proposal new or subject to an annual review?	The Council continues to make progress in improving value for money and generating efficiency savings. Many of the previous years' efficiencies including review of administration and management restructuring are bedding in but more efficiencies are required if the Medium Term Financial Plan is to remain in balance over the next four years as reduced government grant and increased inflation takes effect. Over the next four years the Council will generate a further £3.5million of efficiencies, with on-going efficiencies of £1.2 million being achieved from 2020/21 onwards.		
What are the likely risks?	The risks are assumed to be neutral as the council continues to make progress in improving value for money and generating efficiency savings		
What public consultation has been planned/ taken place?			
What mitigating actions will the Council implement to offset any negative impacts?	<p>The programme of cumulative efficiency savings include:</p> <ul style="list-style-type: none"> • Multi skilling in call centre - £110k • Reductions in ICT Business Partners - £115k per annum • Closure of Templars Square Office - £141k per annum • Reduction in Planning ICT scanning contract £70k per annum • Staffing savings in Financial Services - £168k per annum • Renegotiation of leisure centre contract - £10.1 million since 2009 <p>Limited efficiencies have been included in the HRA business plan of £57k in 2019-20 followed by a further £60k in 2020/21 and it is intended that this will be achieved by :</p> <ul style="list-style-type: none"> • Improved voids turnaround resulting in reduced rent loss. Estimated to be one extra week's rent charged on the total number of voids per annum because of a faster 		

	<p>turnaround = £32k increased rent.</p> <ul style="list-style-type: none"> • Moving some responsive repairs to a planned programme e.g. fencing. This is estimated to deliver £49k savings. • The benefits derived from the failure demand project in Customer Services and Direct Services. Whilst the quantum of savings is not certain, the remaining £36k should be achievable via these changes 									
Overall assessment of the equality risks	<table border="1"> <tr> <td>Race Neutral</td> <td>Disability Neutral</td> <td>Age Neutral</td> </tr> <tr> <td>Gender reassignment Neutral</td> <td>Religion or Belief Neutral</td> <td>Sexual Orientation Neutral</td> </tr> <tr> <td>Sex Neutral</td> <td>Pregnancy and Maternity Neutral</td> <td>Marriage & Civil Partnership Neutral</td> </tr> </table>	Race Neutral	Disability Neutral	Age Neutral	Gender reassignment Neutral	Religion or Belief Neutral	Sexual Orientation Neutral	Sex Neutral	Pregnancy and Maternity Neutral	Marriage & Civil Partnership Neutral
	Race Neutral	Disability Neutral	Age Neutral							
	Gender reassignment Neutral	Religion or Belief Neutral	Sexual Orientation Neutral							
Sex Neutral	Pregnancy and Maternity Neutral	Marriage & Civil Partnership Neutral								
<p>Budget Proposal</p> <p>New Investment and Service Enhancement proposals:</p> <ul style="list-style-type: none"> • Economic Development - £82k - inclusion of posts in budget to undertake work economic regeneration and City Centre management largely arising from the withdrawal of County Council funding • Planning Services - £71k – posts for transformation in planning and environmental services • Conservation Appraisal - £50k - this is a contribution towards the funding of an appraisal of our central conservation area – this is a study that will support delivery of growth, support better decisions (by having up to date information that will help us with planning applications and at appeal if those circumstances apply) and feed into the local plan. • Repairs -£400k per annum – a recent stock condition survey of council buildings 										

	<p>has revealed backlog repairs of around £7.5 million. An increase of £400k per annum in addition to £600k existing budget and a one off £500k from capital still leaves a backlog of around £2.7 million at the end of the four year period.</p> <ul style="list-style-type: none"> • Apprenticeship Levy - £175k – the Government have introduced a levy for all businesses with a payroll bill in excess of £3million. Based on 0.5% of the payroll bill it is payable from 1/4/2017 and levy funds can be used to offset training costs for apprentices. • Digital Inclusion - £15k for 2 years – consultancy to design digital services that enable our customers to more easily engage with council services on line • Individual Electronic Registration - £97kn - the additional budget covers the cost of 2 additional staff brought in to undertake the work together with supplies to run the process after the Government grant is removed. • Committee administration - £23k- represents the balance of staffing costs net income from the Housing Company and OxWed to run the Growth Board. • Go Ultra Low project manager £15k per annum for one year- relates to part time officer to assist in the running of the GULO project • Oxford Living Wage -£35k per annum – this budget ensures that the Oxford Living wage is maintained for staff working within the Leisure services partnership, above the contractual requirement 						
<p>What mitigating actions will the Council implement to offset any negative impacts?</p>							
<p>Overall assessment of the equality risks</p>	<table border="1"> <tr> <td data-bbox="616 1104 1144 1197"> <p>Race Neutral</p> </td> <td data-bbox="1144 1104 1673 1197"> <p>Disability Neutral</p> </td> <td data-bbox="1673 1104 2042 1197"> <p>Age Neutral</p> </td> </tr> <tr> <td data-bbox="616 1295 1144 1388"> <p>Gender reassignment Neutral</p> </td> <td data-bbox="1144 1295 1673 1388"> <p>Religion or Belief Neutral</p> </td> <td data-bbox="1673 1295 2042 1388"> <p>Sexual Orientation Neutral</p> </td> </tr> </table>	<p>Race Neutral</p>	<p>Disability Neutral</p>	<p>Age Neutral</p>	<p>Gender reassignment Neutral</p>	<p>Religion or Belief Neutral</p>	<p>Sexual Orientation Neutral</p>
<p>Race Neutral</p>	<p>Disability Neutral</p>	<p>Age Neutral</p>					
<p>Gender reassignment Neutral</p>	<p>Religion or Belief Neutral</p>	<p>Sexual Orientation Neutral</p>					

	Sex Neutral	Pregnancy and Maternity Neutral	Marriage & Civil Partnership Neutral
Budget Proposal	General Fund Capital Programme		
Is this proposal new or subject to an annual review?	<p>The draft General Fund Capital Programme is funded over the next four years by revenue (13%), Capital receipts (23%) Community Infrastructure Levy (3%), borrowing (54%) and Government Grants and third party contributions (7%). All revenue costs have been included in the General Fund revenue budget.</p> <p>The proposed General Fund Programme shown amounts to around £147.1 million over the next four year period The full programme of investment includes £2.4 million on flood relief schemes, community centre improvements £3.6 million, Disabled Facility Grants £4.0 million, parks, open spaces and athletics facilities £5 million, car parks resurfacing and improvements £1.2 million, ongoing renewal of council vehicles £8.9 million, £2.2 million museum improvements, £4 million loans to companies, investment in ICT £2.4 million and improvements to investment properties £10million. Loans to the housing company £60 million</p> <p>Other key elements include:</p> <p>Purchase of properties for homeless families – The purchase of approximately 39 properties financed by prudential borrowing and Retained right To Buy receipts both within and in close proximity to Oxford will house homeless families, providing additional net income and savings on the temporary accommodation homelessness budget.</p> <p>Purchase of leasehold property – The budget provides for the purchase of the leasehold on land currently owned by the Council in order to undertake housing development either by the Housing Company or the Council</p>		

	<p>Developing additional car parking capacity at Seacourt Park & Ride</p> <p>Development of a new Recycling transfer station</p>		
Overall assessment of the equality risks	Race Neutral	Disability Neutral	Age Neutral
	Gender reassignment Neutral	Religion or Belief Neutral	Sexual Orientation Neutral
	Sex Neutral	Pregnancy and Maternity Neutral	Marriage & Civil Partnership Neutral
Budget Proposal	Housing Revenue Account Capital Programme		
Is this proposal new or subject to an annual review?	<p>The draft HRA Capital Programme is intrinsically linked to the HRA Business Plan since the resources to fund the programme are largely generated through housing rents</p> <p>The revised programme of £74.9 million over the next 4 years includes:</p> <ul style="list-style-type: none"> • Tower block refurbishment £7 million • Great Estates enhancement of car parking and other infrastructure £4.2 million • Barton Regeneration £3.3 million • Improvements to doors, windows, controlled entry including the Oxford Standard - £6 million • Improvements to kitchens, bathrooms, roofs, heating and electrics -£18 million • Blackbird Leys Regeneration - £5.4 million – to undertake regeneration at the heart of the 		

	<p>estate</p> <ul style="list-style-type: none"> • A contingency of £23.1 million will be created to mitigate the potential financial effect of the Government's initiatives around High Value Council Housing in lieu of selling high value council housing 						
What are the likely risks?	<ul style="list-style-type: none"> • Disposals as detailed before are not secured causing a shortfall in funding of schemes • Estimate for payment to Government in respect of HVCH is insufficient • Slippage in Capital Programme and impact on delivery of priorities • Robustness of estimates 						
Overall assessment of the equality risks	<table> <tr> <td>Race</td> <td>Disability</td> <td>Age</td> </tr> <tr> <td>Neutral</td> <td>Neutral</td> <td>Neutral</td> </tr> </table>	Race	Disability	Age	Neutral	Neutral	Neutral
	Race	Disability	Age				
	Neutral	Neutral	Neutral				
<table> <tr> <td>Gender reassignment</td> <td>Religion or Belief</td> <td>Sexual Orientation</td> </tr> <tr> <td>Neutral</td> <td>Neutral</td> <td>Neutral</td> </tr> </table>	Gender reassignment	Religion or Belief	Sexual Orientation	Neutral	Neutral	Neutral	
Gender reassignment	Religion or Belief	Sexual Orientation					
Neutral	Neutral	Neutral					
<table> <tr> <td>Sex</td> <td>Pregnancy and Maternity</td> <td>Marriage & Civil Partnership</td> </tr> <tr> <td>Neutral</td> <td>Neutral</td> <td>Neutral</td> </tr> </table>	Sex	Pregnancy and Maternity	Marriage & Civil Partnership	Neutral	Neutral	Neutral	
Sex	Pregnancy and Maternity	Marriage & Civil Partnership					
Neutral	Neutral	Neutral					

Summary of Responses

Summary Graphs

List Responses

Cross Tabulate

Export

1

APPROACH TO BUDGET SETTING

Our approach is to focus council spending on protecting frontline services, avoiding compulsory redundancies and reducing the gap between rich and poor in our city. To what extent do you agree or disagree with this general approach?

Strongly agree		37% (17)
Agree		48% (22)
Neutral		11% (5)
Disagree		4% (2)
Strongly disagree		0% (0)

2

CAPITAL INVESTMENT

The Council's capital investment programme over the next four years totals £172 million (GF £122 million and HRA £50 million). Some of the more significant schemes are detailed below. Please let us know to what extent you agree or disagree with these schemes.

--	--

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Contribution to major flood alleviation measures (Budget £4.0 million)					
Pedestrianisation of Queen Street contribution (Budget 0.5 million)					
Refurbishment of Community Centres (Budget 3.6 million)					
Purchase of properties to house the homeless (Budget 10.0 million)					
New recycling transfer station facilities, generating a significant financial saving (Budget 2.4 million)					
A new sports facility at Horspath Road, freeing up space to give BMW expansion options (Budget 4.9 million)					
Investing in a council housing company, to build new homes for local people (Budget 60.0 million)					
Additional spaces at Seacourt Park and Ride, to raise income and provide more parking options (Budget £3.9 million)					

Council dwelling tower block refurbishment, funded out of tenants' rents (Budget £6.9 million)	
Council dwelling - kitchen/ bathrooms and electrical replacement, funded out of tenants' rents (Budget 5.0 million)	
Regeneration of central Blackbird Leys, including a new community centre (Budget 3.6 million)	

3

REVENUE BUDGET FINANCED FROM COUNCIL TAX

In our revenue budget, we have little room for new investment. However, we propose to do the following and would welcome your views:

	<table border="1"> <tr> <td data-bbox="667 1251 824 1381">Strongly Agree</td> <td data-bbox="824 1251 953 1381">Agree</td> <td data-bbox="953 1251 1096 1381">Neutral</td> <td data-bbox="1096 1251 1260 1381">Disagree</td> <td data-bbox="1260 1251 1425 1381">Strongly Disagree</td> </tr> </table>	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree		
Maintain our spend on supporting homeless families						
Maintain resources in City Economic regeneration						

<p>Increase resources in Planning Services, to ensure planning applications are processed quickly</p>	<input type="range" value="75"/>
<p>Invest in repairs and maintenance of Council buildings to generate income or support our communities</p>	<input type="range" value="50"/>
<p>Continue with apprenticeship programme</p>	<input type="range" value="45"/>
<p>Continue to expand our works trading activities, to generate income for investment in the frontline</p>	<input type="range" value="55"/>
<p>Continue to give concessions for council services to those on low incomes</p>	<input type="range" value="50"/>
<p>Continue to pay staff the Oxford Living wage of at least £8.93 per hour and require contractors to do the same</p>	<input type="range" value="40"/>

4

FEES AND CHARGES

While the Council proposes that most charges such as those for building control and planning will remain at 2015-16 prices, its draft Medium Term Financial Strategy does propose to increase some **fees and charges** over the next four years. Please indicate whether you agree or disagree with the following specific proposals, which will enable us to preserve core front-line services:

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
Leisure activities, membership and use of sports facilities - a proposed increase ranging from 5p to £2.00 or 1% to 6%					
Pest Control: increases range from £5 to £20, to reflect actual costs					
Cemeteries: increases range from 1% to 2%					
Car Parking: increases of up to 10p per hour for the Council's off-street suburban car parks (e.g. St Clemets, Summertown)					
Garages - £1 per week increase across the board					
Garden Waste collection: an increase of £2 per year					

5

COUNCIL TAX

Income generated from Council Tax is used to pay for all services except those related to the management and maintenance of council dwellings. It covers, for example, street cleansing, refuse collection and park maintenance.

Please select one option.

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree
<p>Increase Council Tax by 1.99% (City Council's recommendation). This is equivalent to an extra £5.67 per year for each band D tax payer, and helps us to protect frontline services.</p>					
<p>Freeze council tax and cut services by an equivalent amount to a 1.99% increase in Council Tax (£250k per annum)</p>					

6

COUNCIL TAX SUPPORT SCHEME

The City Council is recommending that its **Council Tax Support Scheme** (formerly the Council Tax Benefit Scheme) is maintained on the same basis as that introduced on 1st April 2013. It is estimated that this will cost the Council around £1m per annum from next year as Government Grant is withdrawn.. This means that people on very low incomes will continue to have part or all of their Council Tax paid. Do you agree or disagree with this proposal?

Please select one option.

I agree		70% (32)
---------	--	----------

I disagree		13% (6)
I don't know		17% (8)

7

COUNCIL HOUSING

Over the coming years of the Medium Term Financial Plan we will build and acquire an additional 500 new homes, ensure that our existing homes are properly maintained (including meeting the new "Oxford Standard"), improve the environment on our estates (through the "Great Estates" programme), improve the energy efficiency of existing homes and provide particular support to the regeneration of central Blackbird Leys and Barton.

In what order should the council prioritise the following:

(Please rate from 1 to 5 with 1 being your most important priority and 5 being your least important priority)



	1	2	3	4	5
Building and acquiring new council homes					
Maintaining the quality of existing council homes					
Investing to improve the environment on council estates					
Improved energy efficiency of existing council homes					

Targeted estate regeneration e.g. Blackbird
Leys and Barton



8

Are you a Council tenant?

Yes		2% (1)
No		98% (44)

9

OTHER COMMENTS

Are there any other comments that you would like to make on Oxford City Council's draft Medium Term Financial Strategy 2018-21 and Consultation Budget 2017-18?

This question has been answered 21 times.

To: City Executive Board
Date: 9 February 2017
Report of: Assistant Chief Executive
Title of Report: Annual Update Report on the Corporate Plan
 2016 -20

Summary and recommendations	
Purpose of report:	To seek approval of the 2016 Annual Update Report on the corporate Plan 2016-20
Key decision:	Yes
Executive Board Member:	Cllr Bob Price, Corporate Strategy and Economic Development
Corporate Priority:	All Corporate Plan priorities
Policy Framework:	Corporate Plan
Recommendations: That the City Executive Board resolves to:	
<ol style="list-style-type: none"> 1. Approve the Annual Update report on the Corporate Plan 2016-20, as set out in Appendix 1. 2. Delegate authority to the Assistant Chief Executive to make minor textual/formatting changes to the Annual Update Report in advance of formal publication 	

Appendix
Appendix 1 Annual Update on the Corporate Plan 2016-20

Introduction and background

1. The Corporate Plan is the Council's overarching strategy for delivering high quality services to the people of Oxford. The Corporate Plan 2016-20 was agreed by Council in February 2016. It sets out a clear vision, corporate priorities and objectives, and how the Council aims to achieve them. The Annual Update Report 2016 sets out what we have achieved against these themes in 2016 and our major areas of focus for 2017.

2. While its main function is to guide the Council's priorities, the Plan also provides a guide for its work with partners and will be an effective means of communicating the Council's vision and priorities to the wider community.
3. The Draft Annual Update Report attached in Annex 1 has been drawn up with input from Service Heads and Directors and has been discussed with a range of members.
4. The content of the Draft Annual Update Report should be viewed alongside the draft Medium Term Financial Strategy, which will also be presented at 9 February 2017 meeting of the City Executive Board. The two are developed in tandem to ensure that the Council's resources are aligned with its objectives.

The Annual Update Report on the Corporate Plan 2016-20

5. The Council is committed to its core ambition of building a world class city for all of its citizens; to do this successfully there is a corporate recognition that it will have to continue to transform the way in which services are structured and delivered. The Council aims to create a successful economy and an integrated community which respects and celebrates diversity, protects and enhances the environment, and offers extensive opportunities for residents' leisure time.
6. The Council's priorities for the next three years remain those that were identified in the Corporate Plan 2016-20:
 - A Vibrant and Sustainable Economy
 - Meeting Housing Needs
 - Strong and Active Communities
 - A Clean and Green Oxford
 - An Efficient and Effective Council.
7. The Plan acknowledges that many of the issues that are important to the well-being of our city and its people are not exclusively or directly controlled by the City Council. Achieving our objectives necessarily involves working in partnership with other local authorities, public agencies, community groups, local businesses and third sector organisations. This will become more important as the reductions in public resources deriving from the government's austerity agenda continue, and new ways of delivering services are developed. The Council will work with its partners to influence their resource allocation and plans. The Corporate Plan 2016-20 therefore includes the two cross-cutting priorities of Partnership and Devolution which have underpinned the Council's approach to most areas of its work.

Key challenges

8. The key challenges facing the city and the Council include:
 - The potential economic and social consequences of the decision to leave the European Union
 - Working with our neighbouring district councils, the Oxfordshire County Council, the Local Enterprise Partnership (LEP) and other partners to take forward a devolution proposal to central government. We are aiming to gain greater local

control over finances and decision making in key strategic areas, and to secure additional long term investment in transport, housing and jobs, that will enable the city region to reach its economic potential.

- Responding to the increasing pressures on those with low incomes, as the government's austerity measures and changes in social security systems are introduced.
- Increasing levels of family and single person homelessness, and overcrowded housing.
- Reduced Oxfordshire County Council budgets, in particular in homelessness support, children's services and services for the elderly.
- Increasing internal financial pressures from the reduction in the level of grant that we receive from the Government from over £9m in 2013/14 to just £1.5m next year and zero by 2019/20.

Key achievements

9. The Council's key achievements in 2016-17 include:

- The Council has delivered £1m of efficiency savings in year in addition to the £2 million delivered over the previous two years.
- Securing significant infrastructure funding for the Northern Gateway, unlocking 900 new homes and office space.
- Investing £8.4m to deliver a mixed use development of over 400 new homes, a hotel and office space at Oxpens.
- Establishing a Housing Company to deliver new affordable homes to address the city's acute housing needs.
- Construction of a £2.2m Flood Alleviation Scheme in Northway and Marston
- Developing the Oxford Flood Alleviation Scheme for the western and southern parts of the city in partnership with the County Council and the Environment Agency.
- Investing £5m in a £10m fund for our Real Letting Scheme, to acquire properties to house local families.
- Investing £800K to refurbish Cutteslowe Park Lower Pavilion.
- Securing £142K of Heritage Lottery Funding for the first phase of the Museum of Oxford's development.

Key focus for 2017-18

10. The key focus for the Council in 2017-18 will be to deliver the Council's Capital Programme, which includes:

- Using the Housing Company to increase the housing supply and the numbers of affordable homes.
- Investment in our council homes.
- The regeneration schemes in Blackbird Leys and Barton, planned major repairs and adaptations for disabled people
- Oxford's flood alleviation scheme.
- Community centre developments, Horspath Sports Village.
- The Museum of Oxford development – submission of phase 2 Bid.
- A recycling transfer centre.

- Improvements to the public realm and car parks.
- Continue to expand our trading activities to fund core services.

11. The key programmes and projects also to be delivered in 2017-18 include those to:

- Provide a £1.4m grants programme for the voluntary and community sector
- Agree a new City Centre Strategy with local businesses and residents
- Support disadvantaged people into employment and training through Community Employment Plans
- Support tenants and those in private sector housing who are affected by the Benefits Cap
- Support projects which promote community development and community cohesion and safe and healthy lifestyles
- Work with businesses and communities to further reduce carbon emissions from transport, increase domestic energy efficiency and local energy production
- Invest in digital inclusion and improve access to online services for residents
- Improve services and value for money through reviewing and retendering contracts and audit arrangements.

Corporate Performance Targets

12. The Corporate Plan 2016-20 sets out the corporate performance measures for each of the Council's priority areas. An update on progress on the targets is included within the Annual Update Report. All targets are on track to be achieved or overachieved.

Publication of Annual Report Update of the Corporate Plan 2016-20

13. Once approved for adoption, the Annual Report Update on the Corporate Plan 2016-20 will be made available in hard copy, accessible format and placed on the Council web site.

Legal Issues

14. There are no direct legal implications relating to the Draft Annual Update Report on the Corporate Plan 2016-2020.

Financial Issues

15. The Draft Annual update on the Corporate Plan is underpinned by the Council's draft Medium Term Financial Plan which outlines how the objectives within the Corporate Plan will be funded. The Council's draft Budget for 2017-2021 is presented elsewhere on this CEB agenda.

Environmental Impact

16. The commitment to improving Oxford's environment and reducing the environmental impact of the city is directly reflected in the Clean and Green Oxford corporate priority and underpins all of the Council's activities.

Level of Risk

17. The Corporate Plan 2016-20 is an overarching strategic document, which is underpinned by a series of supporting documents. Details of projects and actions which contribute to the delivery of corporate priorities will be found in the Council's service plans and other delivery plans. Risks are detailed in service and corporate risk registers.

Equalities Impact

18. An equalities impact assessment was undertaken on the Corporate Plan 2016-20. The City Council's overriding concern in formulating its budget and Corporate Plan has been to expand the options and opportunities available to the people of our city. We particularly aim to reduce inequalities and expand opportunities for those suffering from deprivation.

Report author	Caroline Green
Job title	Assistant Chief Executive
Service area or department	Assistant Chief Executive
Telephone	01865 529887
e-mail	e-mail: cgreen@oxford.gov.uk

Background Papers:

The current Oxford City Council Corporate Plan 2016-2020 can be found at :

<http://mycouncil.oxford.gov.uk/documents/s28130/Appendix%201%20Draft%20Corporate%20Plan%202016%20-%202020.pdf>

This page is intentionally left blank

2016 Oxford City Council Corporate Plan Annual Statement **Building a world-class city for everyone**

Our Corporate Plan for 2016-2020 sets out the City Council's vision for our city and for the quality of life of its residents, and our plans for how we will achieve our objectives in the five key priority areas:

- A successful and sustainable local economy
- Meeting the city's housing needs
- Building strong and active communities
- A clean and green city
- Delivering the Council's services efficiently and effectively

This annual statement describes the achievements of the past year in each of these areas of activity, and identifies where we will be focusing our priorities in 2017/18.

Introduction – Leader of the Council, Councillor Bob Price

The result of the EU referendum was a seismic event for the UK. The prospect of being outside the European single market and customs union brings new challenges as we seek to secure a prosperous future for all our residents. The success of the city's economy stems from our position as a global centre for higher education, research, health, biosciences, publishing and car manufacturing; from the ethnic and cultural diversity and strength of our communities, and from our architectural and environmental heritage and cultural assets that attract millions of visitors each year. In the context of the uncertainty about the future development of the national economy that has been created by decision to leave the European Union, the City Council will continue to work with our partners to protect and build on these features to ensure that Oxford remains a welcoming and outward looking international city.

With our neighbouring district councils, the County Council, the Local Enterprise Partnership (LEP) and other partners, we are currently seeking greater local control over finances and decision making through a devolution proposal to central government. This aims to secure the investment in transport, housing and jobs that is needed to reach the city and county's economic potential, and would involve a new combined authority, bringing all six councils together to deal with strategic issues, and an elected mayor to lead that authority.

Despite the challenging national context, the City Council achieved much in 2016 to deliver our ambition, as set out in this report. We delivered £1 million of efficiency savings in year on top of the £1.9 million delivered over the previous two years. We secured investment for major development and regeneration schemes across the city, entered into a new joint venture company with Nuffield College to deliver a mixed use development that will transform a major part of the west end of the city and established a Local Housing Company to deliver new affordable homes. We have continued to invest in our community facilities including sports pavilions at Cutteslowe and Quarry, and a new sports complex at Horspath. We have hosted or supported over 300 cultural events across the city. We have worked with the voluntary sector and public sector partners to accommodate refugee families from Syria, and improve to support for refugees in the City. We have once again achieved national recognition for excellence in many of our services including the Customer Service Excellence Award for all council services.

The financial pressures affecting people on low incomes are increasing as the government's austerity programme and reductions in social security payments take effect. Homelessness has increased in Oxford as it has elsewhere in the country, and at the same time, the County Council has reduced funding for homelessness services. The City Council has responded by working with the other district councils in Oxfordshire and the health services to pool funding that will maintain a smaller number of hostel places. We are investing £10m in acquiring homes for homeless families. We have also been successful in bidding for nearly £800,000 for homelessness prevention.

Looking to the future, we will continue to pursue the aspirations that we have for the city despite the increasing financial pressures. The revenue support grant that we receive from government has reduced from over £9m in 2013/14 to just £1.5m next year and will disappear altogether by 2019/20. The impact of the government's declared policy of devolving more business rate income to local authorities is unknown, making forward financial planning very difficult to do with confidence. People in Oxford will inevitably feel the effects of reductions in the County Council's support for the homelessness hostels, the open access children's centres, and culture and the arts. At the same time, we know that demand for our services is increasing, particularly for those low incomes affected by Government's welfare reforms and the reduction in the household benefit cap.

The City Council's approach of prudent long-term financial management continues to stand us in good stead to manage these challenges without reductions in services. We will need to continue to build on our achievements in delivering efficient customer-focused frontline services, especially for the most vulnerable; investing in our assets, and in our workforce.

Over the next four years, we will deliver £12.3m of efficiencies and increased income to support vital services in the city without reductions to services. We will invest over £123 m in regeneration projects in the city including regenerating council estates, upgrading and improving council homes, £4 million funding for improvements to our community centres, improving our car parks, including a proposed extension of the Seacourt Park and Ride site in preparation for the opening of the new Westgate Shopping Centre in 2017.

The Council's will continue to tackle the major challenges facing the city: providing an environment in which businesses can grow and invest; building more homes for people at all income levels, protecting and enhancing our environment, supporting vulnerable people and safeguarding people at risk, and investing in our communities, tackling inequalities. We are committed to making Oxford a good place to live for everyone – fair, harmonious, and supportive of those most in need through well managed and accessible services.

1. A Vibrant and Sustainable Economy

A smart and entrepreneurial city with a thriving local economy supported by improved infrastructure, training and skills

Oxford City Council Corporate Plan Priorities 2016-2020;

Secure a devolution agreement with central government which gives greater local control of decisions and investment in transport, housing, skills and business support to meet the needs of our economy.

Promote new jobs and increased investment in local enterprises and the knowledge economy.

Improve infrastructure, public transport and opportunities for walking and cycling across the city to reduce congestion, and support economic and housing growth.

Deliver effective support to attract new businesses and allow local businesses to prosper and grow.

Improve workforce skills to meet local demand by working with Oxfordshire Skills Board to support educational attainment, traineeships, apprenticeships and better targeting of funding for skills across the spectrum.

Promote and shape development and unlock land for housing and employment sites to help meet the needs of the city.

Key Achievements for 2016

Secured funding for infrastructure at Northern Gateway and Oxpens, which will result in 900 new homes, office space and over 4200 jobs.

Invested £8.4m to deliver a mixed used development of over 400 new homes, a hotel, office space and public realm in Oxpens, which will transform the west end of the city.

500 businesses can now access faster broadband speeds, via the Super-Connected Cities Project.

Taken forward the redevelopment of Oxford Station with planning guidance for the redevelopment of the station ready for consultation in early 2017.

Work has begun on a new Local Plan, which will shape the city's development up to 2036.

Established Community Employment Plans with partner companies, that will support 20 apprenticeships and 180 people into work experience or training. These will cover Westgate,

Barton Park and the Tower Block recladding projects.

Supported people into locally based work through community job fairs in Blackbird Leys, Rose Hill and Barton.

Engaged with over 1,200 local businesses to support economic growth and attract inward investment. Launched a new Business Forum 'The Talk of the Town'.

Set up a new Start-Up and Grow-On Group to increase office space in the city centre and established a new co-working space at Oxford Centre for Innovation.

Reached the shortlist for the European Capital of Innovation alongside Paris, Milan, Amsterdam, Glasgow, Turin, Eindhoven and Berlin.

Areas of focus 2017-20

With the LEP and Oxfordshire Councils negotiate an ambitious Devolution Deal with Government to secure investment in infrastructure to support housing and economic growth.

Work with partners to develop a low carbon and energy efficient economy

and to increase access to lower cost and sustainable local energy.

Extensive consultation with residents and businesses on the Oxford Local Plan, which will shape the future development of the city to 2036.

Work with partners to ensure the successful opening of the Westgate Shopping Centre in 2017.

Invest £4.5m to make improvements to the Seacourt Park and Ride car park, to ensure that there are adequate car parking facilities to serve the city centre..

Take forward investment and redevelopment of key sites in the West End including Oxpens and the Oxford Station redevelopment.

Invest in the development of commercial sites and creation of space for small business, including Standingford House in Cave Street.

Agree a City Centre Strategy with local businesses, residents and other partners to enhance the physical environment of the city centre.

Create a 2,000sq ft. co-working space in Oxford Town Hall to support small businesses, increase jobs and generate revenue for the Council.

Success Measures	2016/2017 Targets	2016/2017 Projected Outcome
Amount of employment space permitted for development	15,000sqm	Achieved
Number of jobs created or safeguarded in the city as a result of the council's investment and leadership	900	Achieved
Net annual increase in number of businesses operating in the city	200	Exceeded

This page is intentionally left blank

2. Meeting Housing Needs

Improving Oxford residents' access to affordable and high-quality homes in good environments that are close to jobs and facilities

Oxford City Council Corporate Plan Priorities 2016-2020

Tackle the city's housing crisis by promoting high quality development in the city and in locations near to Oxford with good transport links working in partnership with developers, universities, businesses and neighbouring District Councils to build the homes that Oxford needs.

Build more affordable homes in partnership with developers, housing associations, universities and the health sector to meet the needs of different income groups and types of employment in the city, including those on low incomes and those who are vulnerable.

Improve conditions for private tenants by actively enforcing standards for private rented housing and managing the impact on neighbourhoods of Houses in Multiple Occupation (HMOs).

Improve homes for our existing tenants by refurbishing our properties above national standards, making homes more energy efficient and improving the general environment of our estates.

Tackle homelessness and rough sleeping by securing appropriate accommodation and support for those affected.

Key Achievements for 2016

Established a Housing Company, to deliver new affordable homes with a range of tenures to help address the city's acute housing need.

Invested £20m in refurbishment of the city's tower blocks to improve their appearance and structure, upgrade insulation, windows, heating, and electrics and refurbish lifts. Work to be complete by December 2017.

Construction of 900 new homes in Barton is underway through our joint venture company with Grosvenor Developments Ltd.

Agreed plans for the construction of new homes in Cowley and Oxpens, and the redevelopment of Blackbird Leys District Centre, and Knight's Road.

Invested £5m in a £10m fund for our Real Lettings Scheme to acquire properties to house local families in temporary accommodation.

Launched a new Rent Guarantee Scheme to provide access to the private rented sector, for 40 households a year.

Improved energy efficiency in private homes so they are warmer and cheaper to heat. Provided grants and encouraged positive action by landlords.

Helped people access work and provided financial advice to people facing reductions in their benefits. Helped over 200 households through Discretionary Housing Payments.

Protected services for homeless people to mitigate reductions in county funding through joint commissioning of services with the County Council, NHS and district councils.

Secured £790K of government funding to help prevent homelessness and improve services for homeless people.

Key focus for 2017- 2020

Invest £21m in improvements to Council owned homes, £8.7m in regeneration schemes for Blackbird

Leys and Barton, and £4.2m on our Great Estates programme.

Provide a £60m loan to the Council's new Housing Company to supply 500 new social rented homes. The first acquisition will be the purchase of 95 homes in Barton in spring 2018, and 170 homes to be built elsewhere in the city by 2019.

Deliver a £21m programme of major repairs to council homes including upgrading properties, adaptations and energy efficiency.

Further increase accommodation available for those in temporary housing by acquiring further properties through the Real Lettings Scheme.

Provide support for residents facing benefit changes, for example giving extra help to private sector tenants affected by the freeze in Local Housing Allowance and the cut in the level of the benefit cap.

Deliver our Homelessness Prevention Programme, bringing agencies together to provide targeted prevention and outreach work and advice services for those at risk of becoming homeless.

Further joint working with District and County Councils and Health to provide housing support services and further improve value for money.

Success Measures	2016/2017 Targets	2016/2017 Projected outcomes
Number of new homes granted permission	400	Achieved
The percentage of HMOs licensed	70	Exceeded
Limit the use of temporary accommodation to 2015 levels	120	Achieved

This page is intentionally left blank

3. Strong and Active Communities Socially cohesive and safe communities

Oxford City Council Corporate Plan Priorities 2016-2020

Tackle inequality through improved prosperity and by targeting resources to those who need most support.

Provide high quality community and leisure facilities and seek to increase participation in regular physical activity to improve people's health and quality of life.

Improve opportunities for young people to engage in positive activities and develop the skills and ambition to achieve to the best of their abilities.

Celebrate diversity and support our different communities by understanding their needs, supporting voluntary and community groups and delivering high quality cultural events and activities.

Promote safe neighbourhoods and tackle anti-social behaviour through education and early engagement with problems, backed by enforcement action if required.

Safeguard and support vulnerable people including improving quality of life for older people and protecting children, families and adults at risk of exploitation or crime.

Key Achievements for 2016

Invested £800K to refurbish Cutteslowe Park Lower Pavillion to support women's and young people's participation in football.

Horspath Athletics and Sports Ground reopened after a £180K track refurbishment.

Secured £142K from the Heritage Lottery Fund for the first phase of the Museum of Oxford's redevelopment.

Increased the number of participants in the Youth Ambition Programme
2015/16 – 6060
2016/17 – 6640

And increased girl's participation significantly.
2015/16 - 25%
2016/17 – 47%

Attracted over 170,000 people to our cultural events, including the Christmas Light Festival, Common People, Dancin' Oxford, May Morning, St Giles' Fair and the Lord Mayor's Carol Concert.

Barton Park selected as a NHS Healthy New Town, securing £120K of which £30K was for small community projects to address social isolation and food poverty.

Investigated over 2,500 cases of anti-social behaviour and undertook 1,600 enforcement actions to tackle anti-social behaviour and environmental offences

Supported 10 Syrian families through the Syrian Vulnerable Persons Resettlement Scheme and worked with voluntary and faith groups to improve our services to refugees, including increasing access to English Language courses.

Established Health Partnerships, with the Primary Care Trust and health organisations, to address poor health and improve access to health services in key areas.

Assisted council tenants to reduce their energy bills through tariff changes, access to government programmes, and improved energy efficiency.

Improved our safeguarding practice for children and vulnerable adults through implementing a robust and mandatory training programme for staff and councillors, improved our taxi-licensing and launched 'Hotel Watch'.

There are large numbers of people who volunteer in the city to enable community projects to flourish and to help the council achieve its policies

of community cohesion and involvement. We campaigned with partners to encourage volunteering and as a result an additional 150 people have signing up as volunteers.

Areas of focus 2017 - 2020

Implement the Museum of Oxford Development Plan and submit a second round funding bid to develop the museum.

Invest £3.6m improving community centres and £5m improving parks, open spaces and athletics facilities over the next four years.

Invest £4.9m in the development of Horspath Sports Village.

Work in partnership with Fusion to further increase participation rates and improve customer satisfaction with our leisure facilities.

Improve services for refugees and asylum seekers and work to foster community cohesion in the city.

Continue our £1.4m grants programme to support the voluntary and community sector deliver services.

Ensure that the Barton Healthy New Town meets the agreed targets for the local community's health and well-being priorities.

Success Measures	2016/2017 Targets	2016/2017 Projected Outcomes
Resident satisfaction with their area as a place to live	81%	Achieved
The number of people taking part in our Youth Ambition Programme	5,500	Achieved
Number of people using leisure centres	1.40 million visits	Achieved

This page is intentionally left blank

4. A Clean Green Oxford

An attractive and clean city that minimises its environmental impact by cutting carbon, waste and pollution

Oxford City Council Corporate Plan Priorities 2016-2020

Save energy and reduce carbon emissions through energy saving and renewable energy schemes that bring down energy bills, tackle fuel poverty and reduce the city's carbon footprint.

Tackle congestion and pollution that frustrates growth and damages peoples' health through a better public transport offer, our low emission zone and by promoting cycling and walking.

Improve cleanliness of our streets, neighbourhoods and open spaces so that Oxford is an attractive, clean and safe place which residents, visitors and those who work in the city enjoy.

Reduce the total amount of waste and increase the proportion of the waste stream that is recycled providing excellent recycling services and facilities across the city and working with partners to promote recycling.

Protect the city from extreme weather events and flooding by working with partners to invest in effective flood defences.

Key Achievements for 2016

Started construction of a £2.2m Flood Alleviation Scheme to reduce the risk of surface water flooding to 110 homes in Northway and Marston wards in North East Oxford.

Supported the Outline Business Case for the Oxford Flood Alleviation Scheme to protect businesses, households and important transport links in the western and southern parts of the city.

Reduced council carbon emission by 5 per cent for example, by investing in solar panels at St Aldate's Chambers and Horspath.

Won the prize for Local Authority Air Quality Initiative of the Year at the National Air Quality Awards 2015.

Successfully leveraged £14m into local energy projects in the city and county through the OxFutures Programme.

Attracted £50,000 government funding to explore a heat network in Oxford that could reduce carbon emissions and improve energy efficiency.

Launched Schools Tackling Oxfords Air Pollution STOP' project, with six schools, to install air quality monitoring stations and provide

educational material about air quality.

Around 40,000 people attended Low Carbon Oxford Week and 60 organisations contributed to the events.

Achieved 90 per cent reduction in dog fouling in The Leys through an awareness raising campaign.

Improved waste and cleaning services by investing in new technology, including bin weigh and high pressure hot wash street cleansing vehicle.

Increased recycling through the roll out of weekly food waste collection to 19,000 flats across Oxford due to complete by March 2017.

Recruited 20 participants for the 'Go Ultra Low' trial project to install on-street electric vehicle charging in residential areas.

Relaunched the Low Carbon Oxford website to include case studies and easier access to resources for residents and local groups

Key Focus for 2017 - 2020

Complete the £2.2m on Northway and Marston Flood Alleviation Scheme, reducing the flood risk to

110 homes in Northway and Marston.

Invest further £760,000 and implement the Oxford Flood Alleviation Scheme with the Environment Agency and other partners.

Build a £2.4m Recycling Transfer Station to increase recycling rates and deliver £320,000 savings each year from 2018/19.

A further reduction in carbon emissions from transport and increase domestic energy efficiency and local energy production. For example trial on-street electric vehicle charging; increase business engagement; reduce air pollution through 'STOP' project with schools.

Consult on how best can implement our vision for a more sustainable future for the city.

Success Measures	2016/2017 Targets	2016/2017 Projected Outcomes
Amount of non-recycable waste produced in the city per households decrease each year	423Kg	Achieved
Satisfaction with our street cleaning services	76%	Achieved
Implementation of measures to reduce City Council's carbon footprint by 5% each year	5%	Achieved

This page is intentionally left blank

5. An Efficient and Effective Council

A customer focused organisation, delivering efficient, high quality services that meet people's needs.

Oxford City Council Corporate Plan Priorities 2016-2020

Continue to deliver high quality services to residents and businesses in the City ensuring the flexibility to deal with uncertainty about future funding.

Continue to invest in technology to provide customers with more flexible and lower cost ways of accessing services.

Manage our property and assets effectively to generate savings and maximise returns.

Manage our contracts and procurement processes effectively to deliver maximum value for money and continue to develop our anti-fraud capability to protect public money.

Recruit, develop and value a diverse workforce which reflects the make-up of the community that we serve, tackling barriers to employment and career progression.

Key Achievements for 2016

Saved £150K by replacing the ICT infrastructure contract

Roll out of hand held devices within Direct Services facilitating a more flexible way of working.

Increased e-billing, and achieved increases in e-claims for housing benefits and payments by direct debits.

Procurement savings of around £336k per annum from re-provisioning of ICT service contracts and changes in telephony.

Achieved Corporate Customer Services Excellence Accreditation for the whole Council

Launched a new City Council website in January 2016. Over 30% of all customer transactions now performed on online, compared to 25% in April 2016.

The City Council website now has 'Browsealoud' which helps people with low literacy and reading skills, dyslexia, English as a second language and people with a mild visual impairment.

Increased our income from the Town Hall by 13.9% compared with last year.

Provided free wireless access on all buses operating in Oxford, as well as our museums, galleries and public buildings.

Completed a stock condition survey, determined maintenance requirements and identified potential future development sites.

Further increased the income earned from external trading in engineering commercial waste and motor transport by £2.5m.

The Housing and Property Service achieved Silver standard in the National Practitioner Support Service.

An assurance of high standards and inclusive approaches was achieved by the Council's Landlord Services through TPAS accreditation.

Excellence in Corporate Fraud was awarded to the Fraud Investigation Service. Confirming the Council's reputation as having the best counter-fraud team in the UK.

All managers and team leaders undertook the Leadership and Management Development programme to improve management skills and performance across the council.

The Oxfordshire Open Data website was launched for public, researchers and developers to access, analyse and share information about the area.

Areas of focus 2017

Reduce supplier costs in ICT to deliver a saving of £70K.

Invest £15K in digital inclusion over two years to improve access to online services for residents.

Improve services and value for money through reviewing and retendering contracts and audit arrangements.

Achieve National Practitioner Support Service 'Gold Standard for Housing and Homelessness Prevention Services' in Housing Services.

Establish an arms-length trading company to deliver many of our blue collar service such as building works, street cleansing, waste and recycling. To increase income from external trading

Retain our IiP Gold Champion status.

	2016/2017 Targets	2016/2017 Projected Outcome
Level of staff engagement based on best company staff result.	Positive	Achieved
The percentage of customer satisfied at first point of contact	82%	Achieved
Delivery of the Council's cost savings and income targets (over a four year period)	£1,861,000	Achieved

This page is intentionally left blank

To: City Executive Board
Date: 9 February 2017
Report of: Head of Community Services
Title of Report: Grant Allocations to Community and Voluntary Organisations

Summary and recommendations	
Purpose of report:	To allocate grants to community and voluntary organisations through the Community Grants Programme.
Key decision:	Yes
Executive Board Member:	Cllrs Simm, Culture and Communities; and Brown, Customer and Corporate Services
Corporate Priority:	Strong and Active Communities.
Policy Framework:	Oxford City Council Corporate Plan
Recommendations: That the City Executive Board resolves to:	
<ol style="list-style-type: none"> 1. Approve the recommendations for the 2017/2018 commissioning programme as set out in Appendix 1; 2. Approve the recommendations for applications received to the grants annual open bidding programme as set out in Appendix 2 ; 3. Delegate authority to the Executive Director for Organisational Development and Corporate Services in consultation with the Board Members for Customer and Corporate Services and Culture and Communities to allocate the residual funding in the Advice and Money Management commissioning theme. 	

Appendices	
Appendix 1	2017/2018 recommendations for the community and voluntary organisations grants commissioning programme
Appendix 2	Grant applications received to the 2017/2018 open bidding grants programme.
Appendix 3	Evaluation Framework
Appendix 4	Risk Register.

Introduction

1. Oxford City Council supports the local community and voluntary sector with grant aid. The community and voluntary organisations (CVO's) grants programme is co-ordinated and monitored through the Communities Team in consultation with lead commissioning officers and their portfolio holders.
2. The CVO's grants programme has two elements:-
 - Open Bidding – one off grants that can be applied for on an annual basis or on a smaller scale throughout the year.
 - Commissioning – funding for activities that have been identified by the Council as making a substantial contribution to the achievement of our corporate priorities.
3. The proposal in this report is to broadly maintain the funding pattern established in previous years through the City Council's prospectus and maintaining existing relationships and funding patterns for 2017/18.
4. In recent years the funding has come under increasingly intense competition as other sources are reduced reflecting the general tightening in public sector funding, particularly for supported housing and the children's centres.

Grants Budget

5. The total indicative budget for the CVO's grants programme, as currently proposed for 2017/2018, is set out below.

Table 1	2017/18 Budget
Advice & Money Management commissioning theme	£518,379
Homelessness commissioning theme	£442,279
Inclusive arts & culture commissioning theme	£235,262
Community Safety commissioning theme	£61,082
Community & voluntary sector infrastructure commissioning theme	£43,736
Inclusive leisure & play for disabled children and young people commissioning theme	£15,000
Open Bidding	£107,500
Small grants programme to run during the year.	£7,732
Total	£1,430,970

Commissioning

6. During 2016/17 officers have worked closely with the commissioned organisations. Achievements by funded organisations will be reported in the next annual monitoring report to the City Executive Board later in 2017.
7. This report recommends allocations for the third year of a 3 year commissioning programme ending 31 March 2018.
8. Commissioning themes, which remain the same as in previous years, were selected to prioritise grant funding for those most disadvantaged communities in our city. A review of the prospectus for post 2018 will be undertaken during the first part of 2017/18.
9. Based on the previous performance of commissioned organisations, some of the main achievements that we can expect to be delivered under each theme are:
 - People suffering hardship or distress will get the support they need from the advice centres. In particular by the provision of information, advice and assistance on all matters relating to welfare benefits and debt.
 - Children and young people from different societies will be supported to better understand the local context, stay safe and take advantage of opportunities.
 - Specialist support for victims of violence, intimidation and abuse, will be provided giving practical and emotional support.
 - There will be improved opportunities for the diverse range of communities in the city to actively participate in high quality cultural activities and events. This will be achieved by offering reduced and/or free tickets and places to low income families.
 - Work will be done to support homeless people or those threatened with homelessness or rough sleeping into sustainable accommodation. They will be given opportunities to access education, training and employment.
 - Community & voluntary organisations will be supported to bid for funding and improve their sustainability.
 - Volunteering will be promoted giving local people the opportunity to increase their skills, knowledge and confidence.
10. Funding agreements will be put in place with each of the commissioned organisations and a feature of the agreement will be that funding in any given year will be subject to an assessment of performance and budget availability.
11. The Grants Officer works with a number of lead officers from other service areas that have specialist knowledge of specific commissioning themes.
12. The 3 year commissioned advice services agreement (2015/2018) makes provision for agreeing on an annual basis a priority area to focus on. The priority for 2017/18 is still being negotiated with the Advice organisations, but the chosen priority will in

part include supporting people to manage their money, dealing with debt and helping them maximise their income. A specific set of outcome measures will be developed in partnership with the Advice Organisations.

13. All but £20,000 has been allocated from the Advice and Money Management commissioning theme. It is proposed that this funding is reserved as an emergency pot to support organisation(s) where cuts have affected their work that supports the advice and money management theme plus the objectives of the Financial Inclusion Strategy which includes actions to help people support people into employment. The City Executive Board is recommended to delegate authority to the Executive Director for Organisational Development and Corporate Services in consultation with the Executive Members for Customer and Corporate Services and Culture and Communities to allocate the residual funding.
14. The City Executive Board is recommended to approve the recommendations for the commissioning programme as listed in Appendix 1.
15. A report will be submitted to the City Executive Board in March 2017 with the proposed allocations for both the Preventing Homelessness grant and the Council's Homelessness grant commissioning budget to voluntary sector organisations.

Annual Open Bidding

16. A total of 29 applications were received to the grants annual open bidding programme by the closing date of 3 November 2016.
17. The total amount requested was £206,553. The indicative budget allocated for the open bidding grants programme is £107,500.
18. Appendix 3 is a copy of the evaluation framework used by the officer grants panel that made the recommendations for each of the applications received.
19. Each application was first screened for eligibility, i.e. applicants must demonstrate that they are a constituted community organisation run by a committee, providing annual accounts, a bank statement and an equal opportunity statement. Those organisations working with children & young people or vulnerable adults also provided copies of their safeguarding and data protection policies. All applications are subsequently evaluated against criteria relating to:
 - Evidence of social need
 - Who the project is targeting
 - Risk
 - How the application meets Council priorities
 - Monitoring and evaluation
 - Whether the group receive any other subsidy from the Council
 - If the group is financially competent
 - Demonstration of financial need and
 - Value for money.

20. Appendix 2 is a listing of all applications received, the amount requested and the rationale for the recommendation.

21. The City Executive Board is recommended to approve the recommendations for the open bidding grants programme as listed in Appendix 2.

Rents & Business Rates

22. Some organisations recommended for funding through the CVO's grants programme occupy Council premises and pay business rates. Their rent and rates will be deducted from any funding awarded to them. These are set out in Table 2 below.

Table 2

Organisation	Grant (£)	2017/18 rent	2017/18 Business Rates	Balance to organisation
Agnes Smith Advice Centre	£85,290	£7,250	£704.80	£77,335.20
Arts at the Old Fire Station	£32,134	0	£6,227	£25,907
Film Oxford	£25,000	£5,000	£699	£19,301
Fusion Arts	£28,128	£8,837	£869.80	£18,421.20
Modern Art Oxford	£70,000	£70,000	£7,963	0
Oxford Community Work Agency	£122,611	£8,100	£2,726	£111,785
OVADA	£5,000	0	£1,561	£3,439
Oxford CAB	£200,000	0	£4,287.20	£195,712.80
Oxford Playhouse	£24,000	0	£5,436	£18,564
OCVA	£43,736	0	£3,122.20	£40,613.80
Parasol Project	£15,000	0	£1,540.70	£13,459.30
Pegasus Theatre	£25,000	0	£1,399.40	£23,600.60
Rose Hill & Donnington Advice Centre	£90,478	£3,000	0	£87,478
Rose Hill Junior Youth Club	£9,900	£1,110	0	£8,790
Street Revolution	£3,900	£3,900	0	0
Total	£780,177	£107,197	£36,536.10	£644,406.90

NB- business rates are estimated until the business rates have been revalued

Climate Change / Environmental Impact

23. Successful applicants are made aware of the Council's commitment to reducing its carbon footprint and encouraged to take similar action.

Equalities Impact

24. Each organisation must provide their equal opportunities statement to confirm they comply with this legislation and understand their responsibility to promote equality.
25. Some examples of how equality is positively enhanced by the grants programme include funding services for:
 - Survivors of rape, sexual abuse and domestic violence
 - Lesbian, gay, bisexual and transgender people through recommending continued funding for the Oxford Friend helpline
 - People with disabilities, particularly children and young people with disabilities through recommending funding for Parasol inclusive play
 - Older people, through recommending support for specific activities
 - BME groups, through funding dedicated work with asylum seekers and refugees.

Level of Risk

26. Successful applicants must agree to and sign terms and conditions before funding is released. Within these terms they must agree to:
 - Spend the funding on the project described in their application
 - Repay any unspent grant
 - Keep financial records and receipts
 - Return a monitoring form
27. Each organisation awarded grant funding will be monitored by an officer. Please see Appendix 4 for the risk register.

Financial Impact

28. The allocations of grant funding as proposed are dependent on agreement of the Council's budget in February 2017.
29. The total amount of the grants budget currently recommended in this report is £988,691 because £7,732 has been allocated for a small grants programme that will take place during 2017/18 (see Table 1 above) and a report will be submitted to the City Executive Board in March 2017 with the proposed allocations for both the Preventing Homelessness grant and the Council's Homelessness grant commissioning budget (£442,279) to voluntary sector organisations working with rough sleepers and homeless people.

Legal Implications

30. There are no legal implications of this report.

Report author	Julia Tomkins
Job title	Grant & External Funding Officer
Service area or department	Community Services
Telephone	01865 252685
e-mail	jtomkins@oxford.gov.uk

Background Papers: None

This page is intentionally left blank

APPENDIX 1

2017/2018 Recommendations for the Community and Voluntary Organisations Grants Commissioning Programme

Theme **Community Safety**
Strategic Objective **Strong, Active Communities**

209

Organisation & project description	Grant awarded 2016/17	Recom' d for 2017/18
<p><u>Donnington Doorstep Family Centre</u> The proposal is for them to deliver a programme of work with the BME community across the City to enable the community to have a better understanding of safeguarding at what it means to them.</p> <p>Working with mothers and if possible fathers from different ethnic communities across the city in open and closed sessions, 1 to 1 and group sessions.</p> <p>Working with existing and building new relationships with local partner agencies to identify resources and develop toolkits on behalf of Oxford City Council.</p>	<p>£8,000</p>	<p>£8,000</p>
<p><u>A2 Dominion Housing Group</u> A project providing practical and emotional support for females and males experiencing domestic abuse. With a growing need for specialist support for victims of violence, intimidation and abuse, this project has a good track record supporting victims of domestic violence.</p> <p>They work to improve the quality of life for females, males and any children by working with a holistic approach to support and using family intervention</p> <p>The funding will be used to fund 1 FTE domestic violence outreach worker and support costs for the post.</p>	<p>£35,082</p>	<p>£35,082</p>
<p><u>Oxford Sexual Abuse & Rape Crisis Centre</u> A telephone helpline service which is run by a team of trained volunteers. Enabling victims of sexual violence to deal with the effects of these crimes in their lives and improve access to information.</p> <p>The helpline is open 4 times a week and is the only agency providing specialist services for survivors of sexual abuse and rape. They are developing their service to include an ISVA and therapeutic counselling.</p> <p>The funding will be used to contribute to the core running costs for this work.</p>	<p>£15,000</p>	<p>£15,000</p>

APPENDIX 1

<u>Organisation & project description</u>	Grant awarded 2016/17	Recom'd for 2017/18
<p><u>Oxford Friend</u> A confidential telephone helpline service for the Lesbian, Gay Men, Bisexual & Transgender (LGBT) community in Oxford. Which is run by a team of trained volunteers who are all part of the LGBT community.</p> <p>The helpline is open three times a week and is the only agency providing this type of service for a high risk marginalised group of people in Oxford. The funding will be used to contribute to the core running costs for this work.</p>	£3,000	£3,000
<u>Community Safety Theme Total</u>	£61,082	£61,082

Theme Inclusive Play & Leisure for Children & Young People with Disabilities

<u>Organisation & project description</u>	Grant awarded 2016/17	Recom'd for 2017/18
<p><u>Parasol Project</u> A project providing integrated play, recreational and social opportunities for children and young people with learning and /or physical disabilities in Oxford City.</p> <p>The project has a good track record of delivering play and leisure opportunities for children and young people with disabilities. Integrating them with their non disabled peers.</p> <p>This organisation also supports other play facilities across the city by providing trained 'enablers' (an enabler is someone who will support individual disabled children or young people to access mainstream activities).</p> <p>The funding will contribute to the delivery of this work.</p>	£15,000	£15,000
<u>Inclusive Play & Leisure or Disabled C&YP Theme Total</u>	£15,000	£15,000

APPENDIX 1

Theme Community & Voluntary Organisations Infrastructure

Organisation & project description	Grant awarded 2016/17	Recom' d for 2017/18
<p><u>Oxfordshire Community & Voluntary Action (OCVA)</u> OCVA is the main umbrella body for the voluntary and community sector in Oxfordshire. Providing advice, information and training, it engages in advocacy and representation at a strategic level and builds partnerships.</p> <p>The funding will be used to contribute towards the core running costs of this organisation.</p>	£43,736	£43,736
CVO Infrastructure Theme Total	£43,736	£43,736

APPENDIX 1

Advice & Money Management Commissioning
Strategic Objective Strong and Active Communities

Organisation & project description	Grant awarded 2016/17	Recom' d for 2017/18
<p><u>Blackbird Leys Neighbourhood Support Services</u> (also known as Agnes Smith Advice Centre) This advice centre is located in Blackbird Leys and aims to ensure the best practices in the delivery of free independent, impartial and confidential advice.</p> <p>The area of delivery is Blackbird Leys and the surrounding area. In accordance with the new three year funding agreement, 80% of funding will contribute towards the organisation's core running costs (including £7,250 rent payable to Oxford City Council), and the remaining 20% will be provided for funding the annual priority agreed in partnership with Oxford City Council and will be outlined in their Service Specification documents.</p> <p style="text-align: right;">Core Funding £68,232 £68,232 Priority Area Funding £17,058 £17,058 Total £85,290 £85,290</p>		
<p><u>Oxford Citizens Advice Bureau</u> Located in the centre of Oxford, the Citizen's Advice Bureau (CAB) offers self-help and assisted information. CAB is a free confidential advice service including signposting, generalist and specialist casework for client's city wide.</p> <p>In accordance with the new three year funding agreement, 80% of funding will contribute towards the organisation's core running costs and the remaining 20% will be provided for funding the annual priority agreed in partnership with Oxford City Council and will be outlined in their Service Specification documents.</p> <p style="text-align: right;">Core Funding £160,000 £160,000 Priority Area Funding £40,000 £40,000 Total £200,000 £200,000</p>		

APPENDIX 1

213

Organisation & project description	Grant awarded 2016/17	Recom' d for 2017/18
<p>Oxford Community Work Agency (OCWA) Located in Barton in the Neighbourhood Centre, this organisation is an independent community advice and information centre. This organisation comprises of Barton Advice Centre and Oxfordshire Welfare Rights.</p> <p>The focus of OCWA is the provision of specialist advice in social welfare law and debt advice, supporting individuals who live locally in Barton, Headington, Risinghurst and throughout Oxford.</p> <p>In accordance with the new three year funding agreement, 80% of funding will contribute towards the organisation's core running costs (including £8,100 rent payable to Oxford City Council) and the remaining 20% will be provided for funding the annual priority agreed in partnership with Oxford City Council and will be outlined in their Service Specification documents.</p> <p style="text-align: right;">Core Funding Priority Area Funding Additional funding to cover increased work due to the loss of Legal Aid Total</p>	<p style="text-align: right;">£75,200 £18,800 £28,611 £122,611</p>	<p style="text-align: right;">£75,200 £18,800 £28,611 £122,611</p>
<p>Rose Hill & Donnington Advice Centre Located in Rose Hill this advice centre aims to relieve poverty in Rose Hill, Donnington and the surrounding area by providing information, advice and assistance on all matters relating to welfare benefits & debt.</p> <p>In accordance with the new three year funding agreement, 80% of funding will contribute towards the centre's core running costs (including £3,000 rent payable to Oxford City Council) and the remaining 20% will be provided for funding the annual priority agreed in partnership with Oxford City Council and will be outlined in their Service Specification documents.</p> <p style="text-align: right;">Core Funding Priority Area Funding Total</p>	<p style="text-align: right;">£72,382 £18,096 £90,478</p>	<p style="text-align: right;">£72,382 £18,096 £90,478</p>
<p>To be reserved to support organisations affected by further cuts from Oxfordshire County Council who's work supports this theme and the objectives of the Financial Inclusion Strategy.</p>	<p style="text-align: right;">£20,000</p>	<p style="text-align: right;">£20,000</p>
<p>Advice & Money Management Theme Total</p>	<p style="text-align: right;">£518,379</p>	<p style="text-align: right;">£518,379</p>

APPENDIX 1

Inclusive Arts & Culture Commissioning
Strategic Objective Strong and Active Communities

Organisation & project description	Grant awarded 2016/17	Recom' d for 2017/18
<p><u>Fusion Arts</u> A project that fosters and promotes the improvement and development of knowledge, understanding and appreciation of the arts for the benefit of the public and in particular community groups, young people, older people and people with special needs.</p> <p>Their aim is to deliver inclusive projects with outcomes that bring people together in established cultural venues and events. The funding will be used to deliver community focused projects.</p> <p>In 2013/14, Fusion worked with 152 artists, provided 740 education sessions and delivered work for an audience of more than 45,000 people.</p>	£28,128	£28,128
<p><u>Modern Art Oxford</u> This organisation, located in Pembroke Street, was established to promote modern visual arts to the public. Working with artists they deliver a community & education programme aiming to increase the enjoyment and understanding of contemporary art.</p> <p>This funding will be used to pay rent charges payable to Oxford City Council.</p>	£70,000	£70,000
<p><u>Oxford Contemporary Music</u> A project working with artists and musicians to promote high quality new music to the public through the delivery of community focused projects.</p> <p>The organisation is core funded by the Arts Council and any funding awarded will be used to lever in other sources of funding. They support, with delivery of the music programme for the Lord Mayors Christmas Carol Service and Christmas Light Festival, which have been hugely successful both in terms of quality of music and public engagement.</p>	£10,000	£10,000

APPENDIX 1

215

<u>Organisation & project description</u>	Grant awarded 2016/17	Recom'd for 2017/18
<p><u>Film Oxford</u> A project making film and digital media more accessible. Delivering training to increase opportunities for individuals into this industry.</p> <p>Funding will be used to deliver this work (including £5k to pay rent payable to Oxford City Council).</p> <p>In 2013/14, they delivered 210 days of education sessions, provided employment for 1000 artists and delivered work that reached an audience of 70,000 people. In 2013/14, every £1 of Council funding helped them leverage more than £7 of funding from other sources.</p>	£25,000	£25,000
<p><u>Experience Oxfordshire</u> Our funding traditionally contributes towards the core running costs of the organisation rather than the delivery of public-facing work. This can no longer be prioritised. Remaining funding focuses on supporting marketing of cultural organisations and key city events to a tourist audience.</p>	£2,000	£2,000
<p><u>Oxford International Link (OIL)</u> An umbrella organisation co-ordinating twinning links and events throughout the year, providing good partnership working and bringing a lot into the city in both funding and culture.</p> <p>The funding will be used to contribute towards the running costs of these events and to allocate grants to the twinning links for their community activity.</p>	£6,000	£6,000
<p><u>Oxford Playhouse</u> An organisation aiming to raise public awareness and appreciation of the arts through theatre, dance and music. It boasts a good national and international reputation and delivers a range of participatory opportunities for the community including youth theatre, access performances for people who are hard of hearing, deaf, blind and partially sighted and support for local artists and family friendly initiatives.</p> <p>The funding will contribute towards community based/focused projects.</p>	£24,000	£24,000

APPENDIX 1

Organisation & project description	Grant awarded 2016/17	Recom' d for 2017/18
<p>Arts at the Old Fire Station Launched in 2011, Arts at the Old Fire Station is a charity and social enterprise offering support for emerging artists and a gallery with a wide range of exhibitions, a theatre offering music and drama and a studio for all kinds of dance and workshops for artists.</p> <p>The funding will contribute to the delivery of this work.</p>	£32,134	£32,134
<p>Pegasus Theatre An organisation promoting the appreciation of the arts in particular for the benefit of children and young people. The organisation boasts a strong reputation, good partnership working and good track record delivering high quality accessible arts. IT Delivers projects with children and young people targeting socially excluded groups.</p> <p>The funding will be used to contribute to the delivery of their work with children and young people.</p>	£25,000	£25,000
<p>OVADA OVADA provide opportunities for artists to create new work, support the transfer of skills, knowledge & experience, encourage collaborations between artists, develops partnerships, exhibits work and builds new audiences for contemporary art.</p> <p>OVADA has strong links to local schools and to further and higher education providers in Oxford and have developed a workshop programme with City of Oxford College. Their wider programme includes opportunities for students to work in the space, alongside professional artists and practitioners. OVADA will offer day courses and workshops to these young people.</p> <p>OVADA delivers the “The Warehouse Art School”, a one year continuing practice course aimed at artists wishing to professionalise their practice at any stage of their career. Skills development for both young people and emerging artists is combined with a focus on supporting creative practitioners to showcase their work and develop their business expertise.</p> <p>The funding will contribute to the delivery of this work.</p>	£5,000	£5,000

APPENDIX 1

217

Organisation & project description	Grant awarded 2016/17	Recom' d for 2017/18
<p><u>Ark T Centre</u> The Ark T Centre delivers art exhibitions, creative workshops, dance and music. There's a recording studio for young musicians, a rehearsal space for theatre and dance, a performance and concert area and studios for a group of resident artists.</p> <p>Around 900 people come into the Centre each week, some sharing in projects that are open to the public and others in programmes that are run for specific groups.</p> <p>Their volunteer programme aims to help people experiencing difficult situations benefit from mixing with a wide range of other life experiences and to be useful and productive to others. Volunteers provide food every day in the cafe; learn administrative and customer service skills; garden, and support creative workshops. Through this process they acquire skills and training as well as refining social and personal confidence to move on from challenging circumstances. These volunteers are referred to Ark T from agencies working with marginalised groups experiencing the difficulties of drug and alcohol abuse, homelessness, mental health difficulty or those who are NEET.</p> <p>The funding will contribute to the delivery of this work.</p>	<p>£5,000</p>	<p>£5,000</p>
<p><u>Oxford Philharmonic</u> Funding specifically to enable Oxford Philharmonic to increase the number of free family concerts they deliver from 2 to 3 each year, to continue to offer discounted tickets for young people for concerts (with at least 100 free tickets per year to be distributed through the Communities team), continue to deliver work in hospitals and primary schools, and contribute at least one event / activity to the city's Light Festival in November each year.</p>	<p>£3,000</p>	<p>£3,000</p>
<p><u>Arts & Culture Theme Total</u></p>	<p>£235,262</p>	<p>£235,262</p>

This page is intentionally left blank

APPENDIX 2

2017 / 2018 Grant Applications to the Annual Open Bidding programme

Strategic Objective: Strong, Active Communities

Organisation & project description	Area / City Wide	Grant awarded 2016/17	Amount Requested for 2017/18	Amount Recom'd 2017/18	Why?
<p>Amp Community Pub Ltd Funding has been requested to contribute towards the reopening of the Ampleforth Public House on Risinghurst.</p>	North East	Nil	£10,000	Nil	<p>For an organisation to be eligible for funding from Oxford City Council they need to be a formerly constituted group with a bank account and be able to provide audited accounts or a signed statement of their income and expenditure.</p> <p>No supporting documents have been received, therefore the recommendation is not to fund.</p>
<p>Ark T Centre The Ark T Centre provides a range of creative workshops with a recording studio for young people to learn all aspects around music.</p> <p>Funding has been requested to engage with 12 young people aged 16 to 25 years old who are living in hostels, temporary accommodation and those leaving care.</p> <p>2 project workers will work with them to write song lyrics, record tracks in the studio plus rehearse for 2 live celebratory gigs.</p>	City Wide	Nil	£7,145	£4,470	<p>The Ark T Centre has a good track record of engaging with vulnerable young people.</p> <p>The recommendation is to fund £4,470 of this request.</p>
<p>Asian Women's Group Funding has been requested to enable the group to provide activities with women from South Asia backgrounds.</p> <p>Funding has been requested for the following:-</p> <ul style="list-style-type: none"> • Exercise classes • Arts and craft sessions • Family trips • Networking for volunteers • Developing their catering business • Celebrations 	South East	Nil	£5,250	Nil	<p>It was unclear from the application if the women engaged with this programme would be from Oxford or Oxfordshire.</p> <p>There was also uncertainty on the financial capacity of the group in managing grant funding.</p> <p>The recommendation is not to fund although the group would be more suitable to apply for a small grant and focus on one activity. It would also be of benefit to them to link up with OCVA for support writing their application and be more specific about who they are engaging with.</p> <p>It would also benefit the group to link up with the Councils Active Communities team regarding exercise sessions for women.</p>

APPENDIX 2

Organisation & project description	Area / City Wide	Grant awarded 2016/17	Amount Requested for 2017/18	Amount Recom'd 2017/18	Why?
<p><u>Asylum Welcome</u> Asylum Welcome supports refugees and asylum seekers in Oxford and Oxfordshire. They provide:-</p> <ul style="list-style-type: none"> • Information and signposting advice service • Weekly lunch club • English lessons and access to mainstream courses for better integration • Specialist work with young refugees and asylum seekers, helping them with CV's, looking for jobs and budgeting. <p>Funding has been requested to contribute towards the core running costs of the organisation.</p>	City Wide	£7,500	£10,000	£7,500	<p>The project is strong in terms of need and targeted work with asylum seekers and refugees who have recently arrived in the country and are living in Oxford mainly in the OX4 area.</p> <p>The panel recommend funding 75% towards this work conditional that it is not used for work outside of the city.</p>
<p><u>Barton Community Association</u> Funding has been requested to plan and deliver a 'Therapy & Pampering Day' during May 2017 half term for disadvantaged residents of Barton who are not engaged with services.</p> <p>Stalls from partner agencies will provide a range of wellbeing advice, that includes:-</p> <ul style="list-style-type: none"> • Healthy eating • Smoking cessation • Breast screening • Weight management • Drug & alcohol support • Mental health and wellbeing 	North East	Nil	£2,500	Nil	<p>Concerns were raised that the objectives they wish to achieve through this project are already being funded through another funding stream.</p> <p>It was also unclear why they were targeting adults (which included single parents) during a school half term when there was nothing in the application to explain if there would be childcare or activities for children and young people while parents were taking part in pampering or therapy sessions.</p> <p>The recommendation is not to fund.</p>

APPENDIX 2

Organisation & project description	Area / City Wide	Grant awarded 2016/17	Amount Requested for 2017/18	Amount Recom'd 2017/18	Why?
<p><u>Children Heard and Seen</u> This organisation was set up in 2014 to provided targeted support to children of prisoners.</p> <p>They aim to mitigate the effects of parental imprisonment on children, young people and their families.</p> <p>Funding has been requested to provide weekly group sessions for children and young people, plus recruiting and training volunteers to provide the 1:1 support and to co-facilitate the groups.</p>	City Wide	Nil	£10,000	Nil	<p>The panel had some concerns with the application because they say they would like to deliver sessions in 4 areas of the city but they have not identified the children and families that need their support.</p> <p>This suggests no research to evidence if the need is there.</p> <p>Funding was requested for 8 months and it was unclear what would happen to the children and families after this period of support ends.</p> <p>Therefore the recommendation is not to fund.</p>
<p><u>Cotteslowe Community Association</u> Funding has been requested to contribute towards the cost of running a 3 week Summer holiday play scheme for 50 children aged 5 – 11 years old from the local area.</p>	North	£4,450	£7,000	£3,500	<p>Strong on evidencing the need and targeted towards children living in a recognised pocket of deprivation in an otherwise affluent area of Oxford.</p> <p>The panel agreed this project supports the local priorities chosen for the area.</p> <p>The recommendation is to fund 50% of this request.</p>
<p><u>Cotteslowe Seniors</u> A club for local people aged 60 plus living in Cotteslowe and the surrounding area.</p> <p>Cotteslowe Seniors meet every second and fourth Friday morning of the month, alternating a social meeting (usually with a speaker) with an outing to a place of interest. It currently has 33 members and is managed by a part- time co-ordinator.</p> <p>Funding has been requested to contribute towards the cost of hiring wheel chair compatible transport for members to get to social meetings and trips.</p>	North	£1,000	£1,000	£500	<p>The panel noted that transport links in Cotteslowe are poor and there is a significant amount of isolation among the elderly in the area.</p> <p>The panel recommend funding 50% of this request with a condition that it is used for adapted transport to enable members to get to the social meetings.</p>

APPENDIX 2

Organisation & project description	Area / City Wide	Grant awarded 2016/17	Amount Requested for 2017/18	Amount Recom'd 2017/18	Why?
<p>Dovecote Voluntary Parent Committee The Dovecote play scheme runs on Greater Leys and is for children aged 4 - 12 years old.</p> <p>Funding is requested to contribute towards the delivery of low cost inclusive out of school play facilities for vulnerable children living in the local area.</p>	South East	£2,500	£10,000	£10,000	<p>Strong on evidenced need and targeted support for children and young people living in the ward of Northfield Brook.</p> <p>The panel agreed that they fill gaps in service provision for this age group and it is likely they can expect an increase in numbers and their costs due to loss of other services.</p> <p>The recommendation is to fund 100% of request on condition that they increase their public liability insurance cover from £3 million to £5 million.</p>
<p>Good Food Oxford Good Food Oxford was launched in December 2013 to help support the existing work of many organisations in and around the city to improve our food system, to catalyse new initiatives and collaborations and to encourage more joined-up thinking and policy around food issues.</p> <p>Funding has been requested to deliver a year of activities focusing on healthy, accessible and affordable food for residents of The Leys (Blackbird Leys and Greater Leys).</p>	South East	Nil	£7,965	£7,200	<p>Strong on need and targeted activities for local residents in an area of multiple deprivation.</p> <p>Recommend funding £7200 of this request with a condition that they link up with Oxford Survivors and the Clockhouse project regarding their cooking skills workshops.</p>
<p>Headington Action Funding has been requested to contribute towards the cost to organise and deliver Headington Festival.</p> <p>The two day event is being planned to take place over a weekend in June 2017.</p>	North East	£500	£2,000	Nil	<p>Weak on need and nothing in the application to indicate the festival will be promoted in areas of deprivation.</p> <p>The application is unclear whether any follow up is done with stall holders to see if they had received an increase in clients or memberships due to having a stall at the festival.</p> <p>It was noted that Active Communities will be attending the festival delivering activities and providing some volunteer support.</p> <p>The organisation has healthy reserves and due to budget limitations the recommendation is not to fund.</p>

APPENDIX 2

Organisation & project description	Area / City Wide	Grant awarded 2016/17	Amount Requested for 2017/18	Amount Recom'd 2017/18	Why?
<p>Home Start Oxford Home Start Oxford are an independent local charity,(but part of a nationwide network Home-Start UK) and based in Blackbird Leys.</p> <p>The organisation offers befriending and peer support to families with young children who are vulnerable, isolated and struggling to cope.</p> <p>Funding has been requested to recruit 15 volunteers and provide two 8 week training courses for 4 hours each week for the new recruits.</p>	City Wide	Nil	£9,688	£7,266	<p>Strong on need and targeted support for vulnerable and isolated people and families.</p> <p>Recommendation is to fund 75% of the amount requested because the application tells us they will raise funding from another source for the balance and still run the two 8 week training courses plus recruit and train 15 volunteers.</p> <p>These volunteers will be able to support 125 people.</p>
<p>2scienceUK 2scienceUK was founded in 2010 to provide young people from low income backgrounds an opportunity to gain practical insight into the Science, Technology, Engineering and Maths (STEM) sector as well as the knowledge and confidence to progress to University.</p> <p>Funding has been requested to provide 20 young people from disadvantaged backgrounds with science focused paid work placements and work ready workshops.</p>	City Wide	Nil	£9,880	£4,940	<p>Strong on need and targeted towards young people from areas of multiple deprivation. Links well with education attainment.</p> <p>Overall the panel agreed that unless this type of intervention was done it is unlikely that disadvantaged young people would have the opportunity to get into STEM internships.</p> <p>The recommendation is to fund 50% of request for a small scale pilot project with the conditions that they link up with the locality officer for Blackbird Leys and the Councils Equality and Diversity Officer to ensure they target those most in need.</p>

APPENDIX 2

Organisation & project description	Area / City Wide	Grant awarded 2016/17	Amount Requested for 2017/18	Amount Recom'd 2017/18	Why?
<p><u>Innovista – Thrive Mentoring Project</u> The Thrive project is a youth project working in Barton.</p> <p>Funding has been requested to run a year long intensive mentoring programme targeting 14 'high risk' young people (aged 10 to 19 years old) on Barton & Sandhills.</p> <p>The programme will provide 1:1 sessions to help mentees develop life skills and attitudes required for them to become productive members of their community.</p>	North East	£8,000	£8,000	£8,000	<p>Strong evidence of need and targeted work with a vulnerable group of young people living in an area of multiple deprivation.</p> <p>The quality of the work from this project is considered high.</p> <p>The panel recommend funding 100% of this request.</p>
<p><u>Leys Community Development Initiative – Clockhouse Project.</u> The Clockhouse Project delivers activities that address the needs of older people in the Leys to help them feel less isolated and alone.</p> <p>Funding has been requested to contribute towards providing low cost activities for older people living on the Leys and the support costs to run and organise these activities.</p>	South East	£7,000	£10,000	£7,000	<p>Strong in terms of need and a project targeted towards older people living in the Leys which is an area of multiple deprivation.</p> <p>The panel recommend funding £7,000 of this request with the condition that outreach is continued to encourage new people (from both sides of the estate) to get involved and take part in the activities and to link up with Good Food Oxford regarding their cookery skills workshops.</p>
<p><u>Leys News (Oxford Community Media)</u> Leys News is a community paper that provides news and information about local events and issues, training and learning opportunities and advice on pertinent issues for local people on Blackbird Leys and Greater Leys. .</p> <p>Funding has been requested to contribute towards the costs for them to continue supporting community groups across Oxford in publishing their own local community newspapers.</p>	South East	£7,000	£10,000	£10,000	<p>Strong in terms of targeted work with community groups in regeneration areas of the City.</p> <p>Currently working with community newspaper groups in Cowley, Rose Hill, Wood Farm, Barton, Northway, Risinghurst and Blackbird Leys, supporting 60 volunteers across these newspapers.</p> <p>The panel agreed that community newspapers are an important means of information for vulnerable, isolated local people who may be unable to get out.</p> <p>The recommendation is to fund 100% of request.</p>

APPENDIX 2

Organisation & project description	Area / City Wide	Grant awarded 2016/17	Amount Requested for 2017/18	Amount Recom'd 2017/18	Why?
<p><u>Leys Information Technology Zone (LITZ)</u> LITZ is a Community Interest Company based at Blackbird Leys Community Centre and runs IT courses for local residents.</p> <p>Funding has been requested to contribute towards salary costs for tutors and teaching assistants.</p>	South East	Nil	£10,000	£5,000	<p>Strong on evidenced need.</p> <p>The panel recommend funding 50% of request to enable 90 students from the regeneration areas of the city to access courses.</p> <p>The recommendation is given with the condition that they collect evidence to show how they target and recruit people from the regeneration areas and that they link up with the Blackbird Leys Locality Officer.</p>
<p><u>My Life My Choice</u> My Life My Choice is a self-advocacy organisation for people with a learning disability and is based in the City of Oxford.</p> <p>Funding has been requested to contribute towards the costs of running and expanding a monthly social session, that runs from a City location.</p>	City Wide	Nil	£1,000	£250	<p>Strong on targeted work with disabled people.</p> <p>The recommendation is to fund 25% of this request to pay for the transport needs of people who have profound and multiple learning disabilities to enable them to attend the group.</p>
<p><u>Open Door</u> Open Door provides a weekly drop in and sign posting service for local refugees and asylum seekers at East Oxford Community Centre.</p> <p>As well as providing a free hot meal and a space to meet they provide support with form filling and other general support to help them sort out problems.</p> <p>Basic English lessons are also provided.</p> <p>Funding is requested to contribute towards their general running costs.</p>	East	£2,966	£5,390	£2,574	<p>Strong in terms of targeted work with minority groups living in the City.</p> <p>The panel noted that generally they provide the first step before going to or being sign posted to Asylum Welcome.</p> <p>The panel recommend funding £2,574 of this request to contribute towards their general running costs of the project and suggest they link up with SOFEA (South Oxford Food & Education Alliance) an organisation that provides fresh nutritious in date food to local not for profit organisations across Oxfordshire at a reduced price.</p>

APPENDIX 2

Organisation & project description	Area / City Wide	Grant awarded 2016/17	Amount Requested for 2017/18	Amount Recom'd 2017/18	Why?
<p>Oxford Against Cutting (OAC) OAC was set up as a charity in 2015 and is working to help prevent female genital mutilation (FGM) by raising awareness, sharing information, supporting survivors and developing projects to empower young people to champion anti FGM initiatives.</p> <p>Funding has been requested for a 'Train the Trainers' programme so that they can continue to raise awareness and safeguarding work on FGM in Oxford.</p>	City Wide	£5,000 (through youth ambition grants programme)	£8,750	£3,000	<p>Strong on targeted work with vulnerable girls and young women.</p> <p>The panel agreed that this work should be supported and the recommendation is to fund the group £3,000 but some reassurances are needed to ensure what is supported by the Council does not put girls or young women at any unnecessary risk</p> <p>Therefore the recommendation is made conditional that they work with the Equality and Diversity Officer and the Domestic Abuse co-ordinator both from Community Services to work up a proposal that will ensure that young women are not further isolated within their communities by the approach of the project.</p> <p>It is also recommended that the proposal is reviewed and cleared by the Board Member for Portfolio Holder for Culture and Communities.</p>
<p>Oxford Community Land Trust (OCLT) OCLT is a co-operative with the aim to promote and build affordable housing in Oxford.</p> <p>They are working to put in a community led bid for the Irving Building in East Oxford.</p> <p>Their application is requesting funding to pay for a programme manager to take the project through planning and procurement.</p>	East	Nil	£10,000	Nil	<p>The panel felt this is a high risk capital project.</p> <p>Within the grants programme prospectus one of the items the Council will not fund through this programme is capital expenditure.</p> <p>Therefore the recommendation is not to fund</p>

APPENDIX 2

Organisation & project description	Area / City Wide	Grant awarded 2016/17	Amount Requested for 2017/18	Amount Recom'd 2017/18	Why?
<p>Oxford Credit Union Funding has been requested to employ a project worker to develop a marketing strategy with the aim to expand their membership.</p>	City Wide	£10,000 (through commissioning Programme)	£6,000	£3,000	<p>The panel agreed that this application helps support the Councils Financial Inclusion Strategy and has a clear sustainability element to the work as long as membership numbers can be increased, although we recognise there is no guarantee.</p> <p>Therefore the recommendation is to fund 50% of this request with a condition that they attend local community events to promote their service.</p>
<p>Oxfordshire Play Association This organisation provides practical and professional support to all those who provide children and young people with opportunities to play. Funding has been requested to organise and delivery a play and activity day on Blackbird Leys.</p>	South East	£2,500	£2,500	£2,500	<p>Activity planned to take place in one of the Councils priority areas.</p> <p>Recommendation is to fund 100% of request.</p>
<p>Oxford Sexual Abuse & Rape Crisis Centre Funding has been requested to continue the provision of their support group. for survivors of sexual violence.</p>	City Wide	£15,000 (through commissioning programme)	£10,000	Nil	<p>The panel had concerns that the approach they proposed in their application didn't address barriers some people my face accessing the group.</p> <p>The organisation has been recommended to received funding through the commissioning programme and due to budget limitations the recommendation is not to fund.</p>
<p>Reducing the Rise of Domestic Abuse This organisation supports vulnerable adults and children who are at risk of harm in their own homes. Aiming to keep them safe and helping them rebuild their lives. Funding has been requested for an emergency fund to enable those people who are considered high risk to get to a place of safety.</p>	City Wide	Nil	£2,000	£1,000	<p>Strong on evidenced need and targeted work with vulnerable adults and children.</p> <p>The panel noted that they work County wide therefore the recommendation is to fund 50% of request for those adults and children they support in the city..</p>

APPENDIX 2

Organisation & project description	Area / City Wide	Grants awarded 2016/17	Amount Requested for 2017/18	Amount Recom'd 2017/18	Why?
<p><u>Restore – Elder Stubbs Festival</u></p> <p>Funding requested to contribute towards the cost or organising and running the Elder Stubbs Festival planned to take place on 19.08.17</p>	Cowley	£3,099	£6,000	£1,500	<p>A popular annual event that works to dispel the misconceptions around mental health issues.</p> <p>The panel recommend funding 25% of the amount requested towards the volunteer recruitment, training and expenses.</p>
<p>Rose Hill Junior Youth Club</p> <p>RHJYC runs twice weekly after school sessions for children aged 6-8 years and 9-11 years old during term time.</p> <p>A senior youth club runs on a Thursday evening for young people aged 11-15 years old.</p> <p>Average weekly attendance to all of the above is a cumulative 150 children and young people.</p> <p>Funding has been requested to contribute towards the staffing and room hire charges for the club.</p>	South East	£7,500	£9,900	Nil	<p>The panel noted that one of the Rose Hill priorities is the RHJYC.</p> <p>Organisation have recently been awarded £458,000 from the Big Lottery Fund so this funding is no longer needed. recently</p>
<p>Streets Revolution</p> <p>A non-profit organisation whose aim is to use Sport and leisure as a tool to engage with marginalised sections of the community.</p> <p>Funding has been requested to work with Oxford Survivors who are based in Blackbird Leys community centre to support their members in a variety of ways.</p>	South East	Nil	£5,585	£3,900	<p>Targeted work with a mental health support group.</p> <p>The recommendation is to fund the room hire charges for the group so they can continue meeting at Blackbird Leys Community Centre.</p> <p>The recommendation is made with the condition that the payment is made as an internal transfer and that they link up with Good Food Oxford.</p>

APPENDIX 2

Organisation & project description	Area / City Wide	Grants awarded 2016/17	Amount Requested for 2017/18	Amount Recom'd 2017/18	Why?
<p>Wood Farm Youth Centre Funding has been requested to contribute towards the continuation of youth sessions in 2017.</p>	North East	£7,000	£9,000	£7,000	<p>Strong in terms of need and targeted work with vulnerable young people in a regeneration area of the city.</p> <p>A facility that is still much needed in the area where there is little else for young people on the estate.</p> <p>Therefore the panel recommend funding £7,000 of the request.</p>
Unallocated				£7,400	
Totals		£87,015	£206,553	£107,500	

Evaluation Sheet
Community Grants 2017/18

Declarations of interest Please provide details. If declaring an interest the assessors will absent themselves while the application is evaluated.	
Organisation Name	
Project Name	
Amount requested	£
Date evaluated	
Is application eligible (yes / no)	
Total score	
Initial Recommendation	£
Comments	
Final Recommendation	£
Comments	

Eligibility	Yes / No	Comments
From community or voluntary organisation, a social enterprise or a not for profit community focused organisation		
Run by a committee (at least 3 people (chair, secretary & treasurer))		
Primarily Oxford beneficiaries		
Constitution / Equal opportunities		
Annual accounts		
Bank statement		

If all above are not met reject application

232

Monitoring Returned?	Yes / No	Comments
Has the organisation been funded in 2015/16?		
Did they complete and return a monitoring form and provide evidence of spend?		
If No, the organisation is not eligible for funding for one year. Is this applicable to this application?		

Theme selected

A vibrant & sustainable economy

Strong & Active Communities

Cleaner, greener city

Section 3 – About the project

Evidence of need

Score	Score	Description	Comments
	0	Application fails to answer the question or includes nothing relevant	
	2	States what the need is but does not back this up with evidence.	
	4	Identifies need, demand and supply (or 2 out of 3) but relies on out of date data or only quantitative or qualitative data.	
	6	The proposal identifies need demand and supply. It uses up to date (i.e. less than 3 years old) available data that is both quantitative and qualitative (or example surveys, and deprivation & census data).	
/ 6	Total		

Beneficiaries / Targeting

233

Score	Score	Description	Comments
	0	Application fails to answer the question or includes nothing relevant	
	2	The application evidences some community benefit to a wide range of individuals or groups or to area's that do not have high indices of multiple deprivation	
	10	The application evidences community benefit that is targeted towards areas with high indices of multiple deprivation or prioritises work with socially excluded groups	
/ 10	Total		

Risk

Score	Score	Description	Comments
	0	Application fails to answer the question or fails to identify any risks related to the project or activity (eg safety)	
	2	Application has identified relevant risks and has taken steps to manage some of the risks but not all	
	4	Application is fully aware of the relevant risks and has taken steps to manage all of them.	
/ 4	Total		

Section 4 – Meeting the Aims of the Council

Score	Score	Description	Comments
	0	Application fails to answer the question or includes nothing relevant or selects multiple objectives or wrong objective for project activity.	
	2	Has identified which objective the project meets but not explained how the action meets the objective.	
	4	The application clearly explains how the action meets the objective.	
/ 4	Total		

Section 5 – Monitoring & Evaluation

Score	Score	Description	Comments
	0	Application fails to answer the question or includes nothing relevant	
	2	The application has not stated how the activity / project will be monitored, what data will be collected and how this will be reported, or it provides basic minimal information, or has stated that the impact of the project / activity cannot be measured.	
	4	The application has indicated what will be monitored and what related data and impact information will be collected, at what frequency and how this will be reported.	
	6	The application has clearly indicated what will be monitored, at what frequency, what data will be collected plus relevant outcomes and how this will be reported and has linked this with the objective they have selected that meets the aims of the Council.	
/ 6	Total		

234

Section 6 & 7 – Financial Details of Organisation & Project

Additional subsidies

Score	Score	Description	Comments
		Is the project going to benefit from any additional subsidies from the city council? (in the form of financial or in kind support).	
	1	No	
	- 1	subsidy less than grant requested	
	- 2	subsidy same as grant requested	
	- 3	subsidy more than grant requested	
/ 1	Total		

Financially competent

Score	Score	Description	Comments
	0	The summary does not accurately reflect the information in the accounts	
	1	The summary does accurately reflect the information in the accounts	
/ 1	Total		

235

Score	Score	Description	Comments
	0	The figures contained in the form do not add up correctly	
	1	The figures contained in the form do add up correctly	
/ 1	Total		

Score	Score	Description	Comments
	0	The estimated costs are not realistic (too expensive or too low)	
	1	The estimated costs are reasonable and realistic	
/ 1	Total		

Financial need

Score	Score	Description	Comments
		Are there more than 6 months unspecified cash reserves (in relation to expenditure)	
	0	Yes	
	1	No	
/ 1	Total		

Score	Score	Description	Comments
		Is the activity the primary responsibility of another agency?	
	0	Yes	
	1	No	
/ 1	Total		

Score	Score	Description	Comments
		How much income (cash) is raised from other sources than the City Council?	
	0	Raise less than grant request	
	1	Raise the same as grant request	
	2	Raise more than grant request	
/ 2	Total		

236

Section 8 – Value for Money

Score	Score	Description	Comments
		If agreed, will the grant lever in money for the project from elsewhere / other funding bodies etc?	
	0	No	
	1	Yes but less than grant request	
	2	Same as grant request	
	3	More than grant request	
/ 3	Total		

Summary	Maximum Score Available	Actual Score
Section 3 - About the Project		
Evidence of need	6	
Targeting	10	
Risk	4	
Section 4 - Meeting the aims of the Council	4	
Section 5 - Monitoring & Evaluation	6	
Section 6 & 7 - Financial Details		
Additional subsidies	1	
Financially competent	3	
Financial need	4	
Section 8 - Value for money	3	
Grand Total	41	/ 41

This page is intentionally left blank

APPENDIX 4

CEB Report Risk Register

Risk Score Impact Score: 1=Insignificant; 2=Minor; 3=Moderate; 4= Major; 5=Catastrophic Probability Score: 1=Rare; 2=Unlikely; 3=Possible; 4=Likely; 5=Almost Certain

239

No.	Risk Description Link to Corporate Obj.	Gross Risk		Cause of Risk	Mitigation	Net Risk		Further Management of Risk: Transfer/Accept/Reduce/Avoid		Current Risk	
		I	P			I	P			I	P
1	Grant funding awarded is not spent on the activity or items it was awarded for. (Strong, Active Communities)	2	1	Terms & conditions for grant awarded not clear.	Mitigating Control: Award letter & terms & conditions are clear and where necessary itemised. Monitoring forms Level of Effectiveness: Medium because information may not be returned	1	2	Action: Reduce Action Owner: Julia Tomkins Mitigating Control: Keep check list and close monitoring Report through Community & Partnership Scrutiny Control Owner: Julia Tomkins	Outcome Required: Clear and detailed terms and conditions signed by each organisation or group awarded a grant. All monitoring forms returned Milestone Date: on going	I	P
2.	Risk to reputation (Strong, Active Communities)	3	3	Declined applicants unhappy with decision	Give clear reasoning as to why application was declined.	3	2	Action: Fair and transparent grants process evaluating each application against set criteria-Nov 2016 Action Owner: Julia Tomkins	Lessen impact of risk to reputation.		

								<p>Mitigating Control: Work closing with media & communications team.- Feb/Mar 2017</p> <p>Control owner: Julia Tomkins</p>			
3.	Commissioned organisations unable to deliver service or project they have been funded to deliver	3	3	Loss of other funding to continue delivery	Maintain good working relationship and be aware of funding cuts within the relevant sectors	3	2	<p>Action: Reduce Provide support to source other funding</p> <p>Action owner Julia Tomkins & other commissioning officers</p> <p>Mitigating Control Maintain good working relationship</p>	Continued delivery of services		

To: City Executive Board
Date: 9 February 2017
Report of: Head of Planning and Regulatory Services
Title of Report: Report on the Community Infrastructure Levy (Neighbourhood Portion) – Agreeing the expenditure deadline for Ward funds

Summary and recommendations	
Purpose of report:	To agree a deadline of expenditure of payment of the Neighbourhood portion of CIL to Wards (non parished).
Key decision:	No
Executive Board Member:	Cllr Alex Hollingsworth, Planning and Regulatory Services
Corporate Priority:	Vibrant and Sustainable Economy Strong and Active Communities A Clean Green Oxford.
Policy Framework:	None
Recommendation:	That the City Executive Board resolves to: 1. Agree an amended expenditure deadline of Neighbourhood CIL funds paid into Ward budgets (non parished)

Appendices	
Appendix 1	Risk Register

Introduction

1. A report to agree the process for spending the Neighbourhood Portion of CIL in the non parished parts of the City was approved at CEB in May 2016. This set out the arrangement whereby any unspent annual ward member CIL allocation would be moved back to the general pot for expenditure by the Council on the wider range of CIL purposes in future years. Members have now requested that the expenditure deadline be extended in certain circumstances and therefore some or all of those identified member ward CIL allocations for a year can be rolled forward for use in future financial years.

The Neighbourhood Portion of CIL – carry forward

2. It was agreed that the Neighbourhood portion of CIL funds paid to non parished wards annually would need to be spent within the financial year. Any unspent fund would be paid back to the general Neighbourhood fund to be used in future years by the City Council.
3. Members have asked for this report to amend what was agreed at CEB in May 2016. It is suggested that the funds allocated this financial year (2016/17) be rolled forward to next financial year (2017/18). However, for future years the money will only be rolled forward for schemes that may be implemented over more than one year or for schemes that are in the budget report.

Financial implications

4. Financial issues are covered above.

Legal Issues

5. There are no legal implications beyond those addressed in the previous report.

Level of risk

6. A risk assessment has been undertaken (Appendix 1). All risks have been mitigated to an acceptable level.

Equalities impact

7. There are no equalities impacts arising from this report.

Report author	Lorraine Freeman
Job title	Developer Funding Officer
Service area or department	Planning & Regulatory Services
Telephone	01865 252178
e-mail	lfreeman@oxford.gov.uk

Background Papers: None

Local Development Scheme 2016-19 Risk Assessment

Title	Risk description	Opp/ threat	Cause	Consequence	Date Raised	Owner	Gross		Current		Residual		Comments	Controls				
							I	P	I	P	I	P		Control description	Due date	Status	Progress %	Action Owner
Changes to the Community Infrastructure Regulations (CIL)	Changes to the CIL regulations may have an impact on the development that will be liable for CIL	Threat	Changes to the CIL Regulations	Could have an impact on the funds received from the levy. This will have an impact on the amount of infrastructure we can deliver	14/12/2016	Head of Planning and Regulatory Services	4	3					Maintain awareness of potential changes in the Regulations so that appropriate responses to any consultations can be submitted in order to minimise negative impacts.	Ongoing throughout the lifetime of the Community Infrastructure Regulations				

This page is intentionally left blank

To: City Executive Board
Date: 9 February 2017
Report of: Head of Planning and Regulatory Services
Title of Report: North Oxford Victorian Suburb Conservation Area Appraisal

Summary and recommendations	
Purpose of report:	To present the conservation area appraisal to committee and seek consent to go out to consultation.
Key decision:	No
Executive Board Member:	Cllr Alex Hollingsworth, Planning and Regulatory
Corporate Priority:	None
Policy Framework:	Oxford Local Plan 2001-2016
Recommendations: That the City Executive Board resolves to:	
<ol style="list-style-type: none"> 1. Endorse the draft conservation area appraisal as the basis for public consultation (attached to this report); 2. Approve the carrying out of consultation upon the draft appraisal; and 3. Approve the seeking of views on additions and deletions to the conservation area. 	

Appendices	
Appendix 1	North Oxford Victorian Suburb Conservation Area Appraisal (draft)
Appendix 2	List of Illustrations

Introduction and background

1. Under guidance from the Department of Culture, Media and Sport (DCMS) and Historic England, all designated conservation areas must undergo a formal character appraisal to justify their original designation, to define their significance and values and to inform decisions regarding future change.

Character Appraisal

2. The Planning (Listed Buildings and Conservation Areas) Act 1990 states that areas of special architectural or historic interest, the character or appearance of which it is desirable to preserve, should be designated as conservation areas.
3. The appraisal (attached to this report as Appendix 1) seeks to define the elements that contribute to the special character of North Oxford Victorian Suburb Conservation Area, highlight the areas of significance and associated vulnerabilities together with brief potential enhancement opportunities.
4. The appraisal recommends reviewing the boundary of North Oxford Victorian Suburb Conservation Area (see Appendix 1 p.50). Possible alterations include:
 - Either the addition of Bainton Road and Moreton Road to the North Oxford Victorian Suburb Conservation Area
 - Or removing Staverton Road and Lathbury Road from the North Oxford Victorian Suburb Conservation Area, in order to create a new conservation area covering Staverton and Lathbury Roads, and Bainton Road and Moreton Road
 - combining North Oxford Victorian Suburb Conservation Area with Walton Manor Conservation Area. This would likely require an immediate appraisal of the Walton Manor Conservation Area.
 - transferring the Radcliffe Observatory, and the area between Woodstock and Banbury Roads south of Bevington Road, into the Central Conservation Area. This would then be included in the Central Conservation Area Appraisal when it is carried out.

These options will be part of this consultation.

Consultation

5. Preparation of the draft North Oxford Victorian Suburb Conservation Area Appraisal involved engagement with residents' associations. The authors were also supported by a number of independent members of the public and ward councillors.

Financial implications

6. The appraisal will provide evidence for the management of the existing conservation area and justifying designation. The only financial implications that would flow from the recommendations being accepted would be the costs of the consultation exercise itself and the collation and consideration of the results of consultation. Those costs are provided for in existing budgets.

Legal issues

7. The carrying out of the proposed consultation exercise can be expected to enhance the robustness of the appraisal subsequently approved. Accordingly it would assist with the integrity and defensibility of decisions made which rely on that appraisal. That would include decisions as to the alteration of existing conservations areas or the designation of a new conservation area (see paragraph 4).

Level of risk

8. There is not considered to be any material risk involved in approving the draft appraisal for consultation.

Equalities impact

9. The consultation will meet the requirements of the Statement of Community Involvement for Planning and will have due regard to meeting the needs prescribed in section 149 of the Equality Act 2010. The consultation will be structured in order to avoid differentiation between those who share a protected characteristic and those who do not.

Conclusion

10. The historic environment is a precious and vulnerable resource that requires effective management to protect it for both present and future generations to enjoy.

A Local Planning Authority's justification for designation, as reflected in the assessment of the area's special interest, its character and appearance, is a factor which the Council and the Secretary of State will take into account when exercising functions under the planning legislation concerning buildings and land within the relevant conservation area. The Committee is recommended to approve the draft conservation area appraisal for the purpose of consultation as to that appraisal, and the seeking of views in the consultation process on additions and deletions to the conservation area.

Report author	Sarah Chesshyre
Job title	Apprentice Planner
Service area or department	Design, Heritage and Trees team - Planning and Regulatory Services
Telephone	01865 252847
e-mail	schesshyre@oxford.gov.uk

Background Papers: None

This page is intentionally left blank

NORTH OXFORD VICTORIAN SUBURB CONSERVATION AREA APPRAISAL

Consultation Draft - January 2017



CONTENTS

SUMMARY OF SIGNIFICANCE	5
Reason for appraisal	7
Location	9
Topography and geology	9
Designation and boundaries	9
Archaeology	10
Historical development	12
Spatial Analysis	15
Special features of the area	16
Views	16
Building types	16
University colleges	19
Boundary treatments	22
Building styles, materials and colours	23
Listed buildings	25
Significant non-listed buildings	30
Listed parks and gardens	33
Summary	33
Character areas	34
Norham Manor	34
Park Town	36
Bardwell Estate	38
Kingston Road	40
St Margaret's	42

Banbury Road	44
North Parade	46
Lathbury and Staverton Roads	49
Opportunities for enhancement and change	51
Designation	51
Protection for unlisted buildings	51
Improvements in the Public Domain	52
Development Management	52
Non-residential use and institutionalisation large houses	52
SOURCES	53
APPENDICES	54
APPENDIX A: MAP INDICATING CHARACTER AREAS	54
APPENDIX B: LISTED BUILDINGS	55
APPENDIX C: LOCALLY SIGNIFICANT BUILDINGS	59

SUMMARY OF SIGNIFICANCE

This Conservation Area's primary significance derives from its character as a distinct area, imposed in part by topography as well as by land ownership from the 16th century into the 20th century. At a time when Oxford needed to expand out of its historic core centred around the castle, the medieval streets and the major colleges, these two factors enabled the area to be laid out as a planned suburb as lands associated with medieval manors were made available. This gives the whole area homogeneity as a residential suburb. The homogeneity is reinforced by the broad streets and the feeling of spaciousness created by the generously proportioned and well-planted gardens.

In its *Conservation Principles* (2008), Historic England suggests that significance may be understood in terms of the following values:

- Evidential value (evidence of past human activity)
- Historical value (the association of the place with past people or events)
- Aesthetic value (sensory appreciation that may be designed or fortuitous)
- Communal value (meaning of a place for people who relate to it, this may well extend beyond the current users/owners)

Evidential value

The area has considerable evidential potential for below ground archaeology being on the edge of an extensive landscape of late Neolithic-early Bronze Age funerary monuments and Iron Age, Roman and early Saxon rural settlement. The two main roads into the city have a long history and are a key factor both in defining the nature of the suburb and as significant entrances into the city. Evidential value is derived from the Conservation Area's rich texture. On the one hand the development of the St John's Estate into an early 'garden suburb' with large houses reflecting growth of a wealthy commercial class is balanced on the other by the market gardens, orchards and nurseries out of which the suburb was planned. Further contrast is evident in the surviving industrial heritage of the canal which forms the western boundary.

Historical value

The historical value of the conservation area derives from the major contribution of a small number of respected architects to the development of an almost rural ethos that contrasts significantly with the lanes and alleys of the city centre. Blue Plaques are an indication of notable residents, many associated with the University but also several affluent professionals whose status was reflected by the grandeur of the houses. Within the Conservation Area are three colleges which were seminal for providing university-level education for women and three newer colleges which focus on international studies and postgraduate level study.

Aesthetic value

The quality of the buildings reflects aesthetic value as is demonstrated by the listing on the National Heritage Register of 73 buildings and structures, all at Grade II except the Radcliffe

Observatory with the linked house for the University Observer, and the church of St Philip and St James. The list could, quite easily, be increased by a further 50%, as there are many significant non-listed buildings which greatly enhance the area. But it is not just the bricks and mortar that emphasise aesthetic value, as the positive contribution of trees, front gardens where they survive, broad streets and the retention of elegant street furniture all add to the Conservation Area's significance.

Communal value

Communal value is manifest in a range of important indicators. The Conservation Area is greatly valued by residents, visitors and those who work there for the quality of its buildings and shared spaces. Educational establishments, whether University level in the colleges, or ordinand training at Wycliffe Hall or in schools all have significance for past and present users of those buildings. The purpose-built working men's institute in Polstead Road is a reminder of philanthropic support for the artisan classes living in the western segment of the Conservation Area and provides essential communal space today. Apart from a Greek Orthodox church in Canterbury Road, the churches are all Anglican but strategically placed in relation to each other and the development of the suburb. War Memorials attached to churches or in schools and in colleges have significance as a focus for remembrance and a reminder of past residents or pupils. Finally leisure or gentle recreational facilities are available to all whether using the river and the canal or as joggers, walkers and cyclists. There are two hotels utilizing large houses east of the Banbury Road, a well-established restaurant in what was Gee's Nursery and three pubs in North Parade and St Margaret's character areas.



Reason for appraisal

The City Council has a statutory duty under the Planning (Listed Buildings and Conservation Areas) Act 1990 to identify those parts of their area that are considered to have 'special historic or architectural interest the character and appearance of which it is desirable to preserve or enhance' and to designate these as conservation areas. Within these areas the 1990 act requires the Council to have special regard to the desirability of preserving or enhancing the character and appearance of the area when exercising its function as a local planning authority.

This character appraisal defines the special historic and architectural interest of the Conservation Area, including those features of its character and appearance that should be preserved. It also identifies negative features that detract from the Area's character and appearance and issues that may affect it in future.

The government's policy for managing conservation areas is set out in the National Planning Policy Framework (DCLG 2012). According to NPPF one of the Government's core land-use planning principles is that Planning should, 'conserve heritage assets in a manner appropriate to their significance, so that they can be enjoyed for their contribution to the quality of life of this and future generations'. Heritage assets are an irreplaceable resource so in determining planning applications, the NPPF directs local planning authorities to take account of:

- The desirability of sustaining and enhancing the significance of heritage assets and putting them to viable uses consistent with their conservation;
- The positive contribution that conservation areas can make to sustainable communities including their economic vitality; and
- The desirability of new development making a positive contribution to local character and distinctiveness.

In response to these statutory requirements, this document defines and records the special architectural and historic interest of the North Oxford Victorian Suburb Conservation Area and



identifies opportunities for enhancement. It conforms to Historic England guidance as set out in *Understanding Place: Conservation Area Designation, Appraisal and Management* (March 2011). It will be used by the Council to ensure that the qualities and local distinctiveness of the historic environment are considered and contribute toward the spatial vision of local plan documents. It should ensure that investment and enhancement in North Oxford Victorian Suburb is informed by a detailed understanding of the area's special interest. It will be used when determining planning applications affecting the area and should inform the preparation of proposals for new development. As a minimum requirement, planning applications should refer to the appraisal when explaining the design concept

The appraisal cannot mention every building or feature within the conservation area. Any omission should not be taken to imply that it is not of any interest or value to the character of the area.



Location

Topography and geology

The North Oxford Conservation Area lies on a gravel terrace of the Thames river valley. This area of gently sloping gravel, known as the Summertown-Radley terrace, was created in the Pleistocene period as a result of melting glaciers depositing large amounts of sand and gravel. These layers were then cut down by the Cherwell and Thames rivers either side creating the terrace. Within the Conservation Area, the land falls to either side by about 8m.

Designation and boundaries

The designation of North Oxford as a Conservation Area was a significant milestone in its acceptance as an area of architectural and historic importance as well as in terms of planning legislation.

The architectural significance of the estate had been questioned after the Second World War. Proposals were being put forward for relief roads running through the centre of the suburb; St John's were considering plans for wide-scale redevelopment of their estate; changes in ownership and use, together with mounting pressure from other colleges and the University for additional accommodation, all of which were placing North Oxford in a very vulnerable position. The residents and preservation bodies were becoming increasingly concerned that North Oxford would be sacrificed in favour of development and set about trying to save the suburb.

The event which was instrumental in securing the City's first conservation area designation was the proposal by the University for the new Pitt Rivers Museum on Banbury Road. The University had acquired nos. 56–64 Banbury Road from St John's in the early 1960s and despite the provisional listing of nos. 60 (considered to be Wilkinson's finest North Oxford work) and 62 under

the 1962 Town & Country Planning Act, the proposal included demolition of these properties. There was considerable local objection to the proposals in terms of potential demolition, the replacement building and proposed use. The development would alter the character and appearance of Banbury Road and the use was at odds with the City's Development Plan as North Oxford had been zoned as residential. Despite the proposal being granted planning permission, the scheme did not materialise; however the ferocity of the opposition from local residents and amenity groups, including the emerging Victorian Group, resulted in Oxford City Council considering how they could give protection to whole areas and not just individual buildings. As they were drawing up a scheme to designate Park Town, Norham



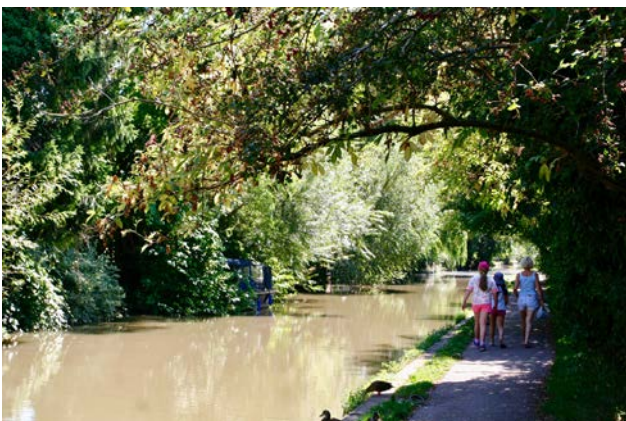
Gardens, Canterbury Road, North Parade (amongst others in the same vicinity) as an area of significance, Duncan Sandys' 1967 Civic Amenities Act was passed enabling the Council to formally designate the same block of streets as a conservation area.

The first designation came into effect on 6 May 1968. It was extended in 1972 to incorporate Fyfield Road and include the previously omitted sections of Norham Manor and to consolidate the boundary along Banbury Road. Rawlinson Road, in the northern sector of the estate, was designated as a separate Conservation Area in 1973 reflecting its "complete and unspoilt area of Victorian character". At the time of this designation, Rawlinson Road was mainly

unchanged. It was one of the last roads to be developed under Moore's supervision but was beginning to come under threat from developers. The boundaries were further consolidated in 1976 to merge the two North Oxford designations and expand the boundary to incorporate all of the 'Wilkinson-Moore' area, as well as the post-First World War developments in the eastern section of the suburb.



The boundaries now extend from Walton Well Road, the north side of Leckford Road, St Giles and the University Parks in the south, up to Frenchay, Lathbury and Belbroughton Roads in the north; the River Cherwell in the east and the Oxford Canal in the west. The boundaries were drawn to include the Victorian development of the St John's College estate. The northern boundary was drawn along its present line as these roads marked the most northerly developments of Wilkinson and Moore encompassing the 'essential North Oxford'. The Cherwell and Canal provided obvious and natural boundaries to the eastern and western fringes.



Archaeology

Geo-archaeological excavations to the south of the Conservation Area indicate that the local sand and gravel deposits result from a series of depositional 'episodes' roughly 135,000 – 70,000 years ago. Most of the gravel in this part of the terrace is thought to date from colder periods when early humans were not present in the landscape. However elsewhere along the Thames Valley the Summertown-Radley gravels have preserved the remains of prehistoric animals including mammoths and woolly rhinoceros. The local Oxford gravels have also produced a significant number of hand axes of a type known as 'middle Acheulean'. These are thought to be 'rolled' artefacts, meaning that they have been picked up by later glacial activity and re-deposited away from where they were originally in use.

After the last glaciation the terrace would have been re-colonised by hunter gatherer groups, although there is currently little evidence for this 'Mesolithic' period in the locality. With the advent of semi-nomadic and more settled farming communities in the Neolithic period, the River Thames became the focus for large earthwork monuments which have left traces in the landscape. These large earthworks were time consuming and labour intensive to build and appear to express the concerns of less nomadic communities with marking out territory, celebrating people who were considered significant, creating communal meeting places and addressing the increasing importance of the seasons to developing agricultural lifestyles.

A number of Neolithic and Bronze Age monuments have been identified in and around Oxford, including a linear cemetery of barrows running from the University Parks towards Jericho, and the ditch of a large henge monument discovered in 2008 under St John's College in St Giles. The North Oxford Conservation Area lies on the northern

edge of this concentration of monuments. A skeleton found between Bradmore and Banbury Roads may well be an outlier of this ancient complex of ritual and funerary structures. Several observations made during the construction of the Victorian suburb of North Oxford suggest that further monuments belonging to this complex remain to be found in this area

Subsequent agricultural use of the gravel terrace in the Iron Age and Roman period is demonstrated by evidence for settlement and field boundaries in the University Parks and Science Area. Iron Age and Roman pottery and burials have also been found in a number of locations across the North Oxford Conservation Area. Dispersed rural settlements with associated enclosures, fields and drove-ways may have extended across the terrace, with excavated evidence including the remains of Iron Age metalworking debris at Park Town and domestic Roman occupation at Middle Way (north of the Conservation Area).

There is evidence that prehistoric burial mounds, mentioned above, remained visible in the landscape into the early Saxon period and provided a focus for early Saxon settlement and burial. Possibly the new communities were making a statement about their legitimacy in the landscape by associating with long established structures. At the old Radcliffe Infirmary site a sunken floored craft hut of likely 6th century date has been recorded close to the remains of Bronze Age barrows. Isolated finds from across North Oxford suggest the presence of Saxon burials, these include a shield boss and spear recovered from near Park Town in the 19th century.

Most of the Conservation Area would have been open fields during the medieval period, however there is some evidence for small scale intermittent settlement in the 11th-13th centuries along the major roads, for example from the former Acland Hospital site on

Banbury Road and at St Anne's College on Woodstock Road.

The Banbury and Woodstock Roads were major route ways in the medieval period and it is likely that the roads are of far greater antiquity, perhaps representing the routes of prehistoric trackways across the gravel terrace running down towards a ford or fords to the south. In a Saxon Charter of 1004, the Banbury Road is described as a 'portstrete', i.e. a paved and therefore Roman road leading to the town or 'port' of Oxford.

The Royal Oak Inn was established on Woodstock Road by the 17th century and the Old Parsonage on Banbury Road was built circa 1600. According to the Victoria County History a windmill was located by the junction of Banbury Road and Parks Road in the early 17th century but had gone by 1660. In the early modern periods the area was used for small scale gravel quarrying for use on yards and driveways. A more gruesome feature of North Oxford was the discovery in St Margaret's Road of the remains of people who had been hung, a fact recorded in its one-time name, Gallows-Baulk Road.



Historical development

At the turn of the 19th century most of the land to the north of St Giles' church was open countryside. Along Woodstock Road there had been small pockets of development including the Radcliffe Infirmary (1759), the Observatory (1772), and St. John's Terrace, nos. 47–53 Woodstock Road, built in the early 19th century for prosperous tradesmen. Banbury Road was a country road with only a handful of houses built along it. North Parade was constructed during the 1830s as a road of small terraced houses. Further north, Summertown was evolving into a self-sufficient village but the main bulk of St John's College's North Oxford estate, which it had owned since the late 16th century, was a combination of fields and allotment gardens.



The enclosure of St Giles' Field in 1828 regulated field boundaries and ownership. Several large houses were built for wealthy local businessmen e.g.: The Shrubbery at 72 Woodstock Road (now part of St Hugh's College), The Mount and its lodge on Banbury Road (demolished in 1913 to make way for St Hugh's) and The Lawn, 89 Banbury Road, all of which were Italianate in design. Development was restricted by long leases already in existence so the College was unable to consider any large-scale development. The Oxford University Act 1854 freed the College's hand so that leases were not renewed upon expiry and the land could be used more economically. Henceforward new,

more competitive 99-year building leases could be offered.

The College aspired to create a suburb of housing suitable for the middle classes that would provide it with a secure long-term income. However, a proposal for the Oxford, Worcester and Wolverhampton Railway to run across St Giles' nearly scuppered these plans and was only aborted after a parliamentary debate. An altogether different proposal also threatened the College's genteel ideas – the construction of a Workhouse on New College land, which was abandoned in favour of the development of Park Town by Samuel Lipscomb Seckham in 1853.

Although the small houses of North Parade had been built in the 1830s-1840s, Park Town was perceived to be an area of urban development surrounded by a rural landscape with no sense of identity. To alleviate the problem of isolation and to encourage further development, FJ Morrell (churchwarden and College steward) petitioned St John's for the establishment of an ecclesiastical parish to serve the new community of North Oxford. St John's eventually agreed to provide the land for the church, and appointed Seckham to draw up plans for the layout of new residential streets.

Seckham's 1854 proposals were based around the Walton Manor Estate with grand Italianate villas along Woodstock Road, a church and smaller terraced houses to the



west. Only two houses were constructed, 121 and 123 Woodstock Road. Morrell preferred a more central location for the church with the result that in 1862 St Philip and St James was designed by G E Street to provide a 'heart' for the new community and to be within easy reach of all sectors of the new suburb.

By 1860 Seckham had lost interest in developing St John's estate and William Wilkinson took over as supervising architect. Wilkinson's Gothic preferences were more in keeping with the College's overall vision, but his initial auctions to dispose of plots were not successful. Development was slow with only 37 houses having been built in Norham Manor by the mid-1860s. St. John's kept strict control of the development, both in terms of the scale of the houses, and their distribution. All designs were vetted for quality, and to ensure adequate provision of front walls and railings, and rear gardens. Norham Gardens was the first road to be laid out as part of the intended suburb, with the south side of the road opening on to the University Parks, and Bradmore Road, curving north from this, was laid out with a picturesque informality.

Owing to its proximity to the canal and Tagg's Garden, a working-class suburb developed from the late 1820s onwards, the western portion of St John's estate was deemed unsuitable for the larger houses planned elsewhere. Artisan and working-class housing could be more readily developed. Wilkinson prepared a plan for Kingston Road in 1865 and by providing plots for smaller houses, St John's could justify its decision to reserve the vast proportion of the estate for more substantial development in the central and eastern sectors.

In the 1870s the pace of development increased rapidly with speculative builders stepping in. By the early 1880s over 660 building proposals had been received by the College, one third of which were financed by the building societies. Through loans from

the Oxford & Abingdon Building Society, Frederick Codd became a major developer beginning with custom-build projects along Banbury Road and in Norham Manor before moving onto speculative building schemes including Canterbury Road and Winchester Road. Codd's houses were bought quickly and their style contributed greatly to the character and appearance of the estate.

The Oxford Building & Investment Company, another building society, went into liquidation in the 1880s. Walter Gray, the administrator, took on the unfinished projects and became the dominant developer. In 1881 he entered into partnership with HW Moore, who as College architect ensured that Gray's building plans were passed quickly, and went on to build over 200 houses, mainly in the north-western sector of the suburb (Kingston Road, St Margaret's Road, Polstead Road and Chalfont Road).

By the 1880s, over half the estate had been developed with a mixture of quality housing. St John's released Southmoor Road in 1880, which was given over to small-scale housing. Wilkinson and Moore were responsible for the development but the College, firmly committed to providing smaller cheaper housing, laid out Hayfield Road in 1886 ensuring the houses were kept small in line with their instructions.



It was not until the 1890s that the Bardwell Estate was laid out. Wilkinson had retired, his nephew Moore was eventually dismissed

and replaced by NW Harrison, whose work is mainly to be seen in Chadlington Road and Charlbury Road. The First World War interrupted development but it was resumed in the 1920s introducing a new wave of architects including Frank Mountain, Arthur Martin and Christopher Wright who developed the final portion of the estate. They introduced new styles creating a totally different character area to the rest of the



established suburb. Northmoor Road and Charlbury Road were extended together with a new connecting road, Belbroughton Road (1924). Garford Road, on the eastern extremity of the estate, was one of the last roads to be completed.

Although the estate's development was virtually complete by the 1930s, North Oxford has continued to grow and alter in ways that St John's College could not necessarily have envisaged in the 19th century. If the First World War changed how people lived with the virtual disappearance of the servant class,



the Second World War heralded new patterns of ownership, education for all and smaller family units. Large houses were no longer economic and were either institutionalised, split for multiple occupancy or demolished. Conversion for institutional use is widespread throughout North Oxford, whether for the University as a whole, for its constituent colleges or for private schools. Multiple occupancy is prevalent across the Conservation Area and is not confined to the largest houses, while both Banbury and Woodstock Roads show gashes where blocks of flats or university residential accommodation have replaced houses, occasionally retaining boundary walls, albeit not consistently.

As wealthy landowners, the Colleges have impacted most on North Oxford with the construction of new buildings occasionally distinguished for the quality of their design or simply for using an internationally known architect. The scale of these buildings and



their encroachment on valuable open space does not always harmonise with the original principles underlying the development of the suburb.

Spatial Analysis

The area covered by the Conservation Area roughly coincides with the estate developed by St John's College. The area is bounded on the east by the Cherwell and the west by the Oxford canal. The land in between rises above the two watercourses but is otherwise flat. From St Giles' in the south the Banbury and Woodstock roads diverge dividing the area into three segments: west of the Woodstock Road; east of the Banbury Road; and the area between these two radiating routes.

The estate was planned on the basis of social class with large villas in the east contrasting with terraced housing in the west. Land was released slowly so that the earliest houses are closest to the city centre in the south. Plots could only be developed once the college had built roads to service them, so progress along the main roads tended to run ahead of the residential enclaves.

Within the eastern residential enclaves (Norham Manor and the Bardwell Estate) the streets are arranged in a simple grid with few curves. Links to the Banbury Road are limited. Park Town separates these two areas from one another with the result that there are only limited routes between the three areas and consequently no through traffic. Between the two main roads, streets generally run east-west, connecting the two thoroughfares, with few connecting links north-south. In the western segment, streets



of mostly terraced housing run north-south.

Throughout the Conservation Area there is no provision for public open space and very few trees in the public domain, emphasising the importance of front gardens for trees and creating a sense of public open space on the streets. The large areas of gardens behind houses, although not in the public domain, contribute to a sense of space, areas for large trees and glimpsed views. Plots, even for large houses, tend to be narrow allowing the college to maximise the number of houses for a given length of street, consequently where there is space, this is to be found in front of and behind residences.

There are few designed views within the suburb: with the exception of Park Town, residential streets do not terminate or frame feature buildings. The view of Lady Margaret Hall was only created in the later twentieth century. The spire and church of St Phillip and St James does create a focal point for many views and St Margaret's might have done the same if its tower had ever been built. Other than churches there are no public buildings of note, even college entrances (see St Hugh's) are not prominently located to catch the eye. Commercial activity is concentrated at the southern end of the Conservation Area with a small enclave of shops and workshops in the north-west corner.

Special features of the area

Views

Views are special in the Conservation Area less because of an abundance of eye-catchers and more because of the sense of openness that views provide whether along roads or between and around buildings. The effect of the views is achieved through the broad streets in most of the Conservation Area and the softening of the hard edges of the built domain with mature trees providing interest and shade in the summer months. Trees and gardens all contribute to an Arcadian feel in most of the character areas.

Within the character areas the views are along streets, which are mostly long and straight; some streets rise gently offering uphill or downhill views. The Woodstock and Banbury Roads provide the main access to Oxford from the north. Indeed, the Woodstock Road is one of the finest approaches to any world-class city and the character of the Conservation Area plays a major part in maintaining this quality. A handful of streets are winding, creating different perspectives particularly where building lines are stepped around the curves.



The most notable eye-catchers are the Radcliffe Observatory in the south, St Philip and St James on the Woodstock Road towards the centre, the water fountain in Walton Well Road and the archway terminating the view through Park Town.

Significant views are to be found within the curtilage of St Hugh's, Lady Margaret Hall and Wolfson College. The location of the last two adjacent to the river offers views across the northern meadows emphasising the rural feel, while the college buildings terminate views from the meadows into the Conservation Area.



Views from the University Parks to the south-east are not complemented by similar views into the Parks, although buildings in the Norham Manor character area benefit from the additional sense of openness that the Parks provide. On the west the canal tow-path affords views into the Conservation Area which are similarly not complemented.

Building types

In this section building types are defined by the purpose for which they were originally built. While current usage may have led to internal and external alterations, it would be misleading to cast the buildings according to their changed use. By the very nature of the Conservation Area, the predominant building type takes the form of different types of housing. Discussion below takes detached and semi-detached properties together, and addresses terraced housing separately. The next major building type is institutional, typically associated with education. There are three churches within the Conservation Area with ancillary buildings, a handful of commercial premises and a few interesting structures that lie outside these broad divisions.

Detached and semi-detached houses

The majority of the Conservation Area is characterised by housing ranging from large detached villas, through large and medium-sized semi-detached houses, to smaller artisan semi-detached houses. The larger houses can be as many as four storeys high, including attics and basements; a few houses stand out for having five storeys. Where basements occur, the grander the address the more likely that a flight of steps leads to the front door usually within a porch or with a canopy over and for the basement to be half above ground offering light into the rooms. The houses of the 1860s through into the 1880s are characterised by lofty rooms, thus adding to their imposing presence.

The semi-detached houses offer a variety of façades. Some of the larger buildings will be double-fronted allowing a feature balcony to be set above a porch. Many share a chimney stack with rooms along the party wall and entrances either at the extreme of the facade or on the side. As the houses become smaller, the side entrance is common offering a little vestibule with a canopy or porch like structure attached to the main block.



Houses tend to be set back from the road allowing space for front gardens. Most houses on corners are set face-on to the street from which access is gained; designs to take advantage of corner sites are infrequent and notable when they do occur.

Terraced housing

The extreme eastern edge of the Conservation Area, backing on to the canal, is characterised by terraced housing, typically in groups of four, six, eight or even ten adjoining buildings. These may be interspersed



with semi-detached villas. Most of these are two storeys in height, in many cases with basement accommodation below ground. Some of the housing offers attic storeys too. Even the smaller terraces have a front area; the terraced houses in Hayfield Road are the notable exception in that the front door gives direct access to the pavement.

Institutional buildings

The colleges whose primary address is within the Conservation Area are dominated by large buildings, typically accommodating lecture theatres, administrative rooms, libraries, dining halls and other facilities to support academic life. The earliest of the colleges, Lady Margaret Hall and St Hugh's, having been designed for female students were deliberately planned in a new way far removed from the quadrangles and staircases of the medieval and later foundations in central Oxford. The so-called quads at Lady Margaret Hall have evolved over time to give the appearance of being similar but do not conform to this paradigm.

The main college buildings, whether designed for academic purposes or for providing student rooms tend to be at least three



storeys high, and in general are rectangular in plan. The Kenyon Building at St Hugh's is a notable exception, while St Antony's has been created out of a former convent building. The wings of Wolfson are also rectangular but they are set at different angles to each other in part to take advantage of the gently sloping site. Chapels are either integral to any main block (St Hugh's) or appear to be separate even if attached by a linking corridor (Lady Margaret Hall). The former chapel at St Antony's now serves as the Library and in the other newer colleges there is a notable absence of chapels. All the colleges have taken over private houses, which have been modified for institutional purposes.

Within the Conservation Area are several schools. The number of purpose-built schools is small: St Aloysius RC primary school on a site replacing a private house; Oxford High School, which started in St Giles, moved into purpose built 21 Banbury Road and relocated to Belbroughton Road in 1957; and parts of the Dragon School. Most of the schools utilise former private houses, and like those converted for educational use by the University colleges, these have been modified internally as well as externally.

Ecclesiastical buildings

The three churches are all large in scale and strategically located to service the growing Victorian Suburb. Street's St Philip and St James (1862) was the first built, designed in the centre of the newly developing areas. Cruciform in plan, its spire dominates the

streetscape and can be seen from several vantage points. St Margaret's which was constructed in 1883 as a chapel of ease to St Philip and St James to meet the expanding population of the suburb, is located to the north-west. If funding had permitted completion of Bodley's tower over the south-west porch, it too would have dominated the local streetscape. To the north-east of St Philip and St James lies St Andrew's (1907), a Neo-Romanesque building with an evangelical tradition also designed to meet the needs of the growing suburb.

Other building types

The Conservation Area contains a small number of other building types. There are few commercial buildings extant, mostly in North Parade, although some buildings in the more densely developed western side of the suburb display evidence of being used as shops. There are three public houses, two in North Parade and one a 1936 rebuild of an older 18th-century inn at the southern



end of Hayfield Road. Gee's (now a restaurant) is a useful reminder of the nursery that once supported the gardening aspirations of the suburb, while the Cherwell Boat House (1904) off Bardwell Road is an example of the leisure pursuits available to the professional classes for whom the suburb was initially developed.

University colleges

The University colleges, whose primary addresses are in the Conservation Area, make a positive contribution in a number of different ways to the setting of the Conservation Area. Six colleges are included within this category and are considered in more detail below: Lady Margaret Hall, St Anne's, St Antony's, St Hugh's, Wolfson and Green Templeton. A number of other colleges operate study centres and/or accommodation blocks within the Conservation Area, and their contribution is more mixed, whether the buildings have been converted from houses for academic purposes (e.g. St Edmund Hall in Norham Gardens) or student accommodation blocks that have been purpose-built (e.g. Jesus College in Woodstock Road and University College likewise). Some houses have been taken over by the University for discipline-specific or central operations (e.g. Department of Educational Studies in Norham Gardens or the IT Department in 13 Banbury Road as well as individual houses being used as University or college nurseries). Outside the scope of this section are buildings for other educational purposes, whether purpose-built or converted from houses (e.g. The Dragon School and St Clare's an independent language school).

Where colleges have taken over houses, the addition of fire-escapes, while necessary for compliance reasons, can have a negative impact on the Conservation Area. Frequently the removal of boundary walls and hedges has detached the buildings from any semblance of their original context. Context is further degraded by the erection of covered bicycle sheds, the loss of gardens to accommodate annexes, parking and bin areas. On the plus side the grounds of the six main colleges in the Conservation Area are generally well-maintained, where feasible retaining more natural habitats to encourage biodiversity. Trees, as elsewhere in the Conservation Area, are important and can soften the landscape and streetscape.

Lady Margaret Hall



Lady Margaret Hall was the first institution in Oxford to provide university-level education for women. It was founded in 1878 to prepare them for university examinations, but did not become a full college until 1960. Originally it occupied one of the Norham Manor villas which the College extended in 1881-83. There were further large extensions in 1896 and 1909-10 by Sir Reginald Blomfield, again in 1915 and 1926 and in 1931 by Sir Giles Gilbert Scott and in 1957-61 the Wolfson Quad by Raymond Erith.

The college benefits from its location adjacent to the River Cherwell as it flows southwards to join the Thames (Isis) south of Christ Church Meadow and makes a positive impact on the broad streets of the Norham Manor character zone. It does spill into a number of houses on the east side of Fyfield Road, some of which suffer from degradation of front garden space.

St Anne's College

St Anne's College began life as part of the Association for the Education of Women, the first institution in Oxford to allow for the education of women, then from 1879 the Society of Oxford Home-Students. In 1942, it became the St Anne's Society, and received a University charter to be founded as a women-only college in 1952. It is one of the larger colleges in Oxford and known for its progressive outlook, its academic strength in



both the humanities and the sciences, its mix of architecture, and its library — the largest college library in Oxford.

The College occupies a tight five-acre site wedged in the base of the Y shape formed by the Woodstock and Banbury roads as they leave St Giles. It manages to retain some open spaces around its large and distinguished buildings: Hartland House by Sir Giles Gilbert Scott (1937), and the accommodation blocks by Howell, Killick, Partridge and Amis (1960-69). Mature trees belonging to earlier buildings surround the campus, which is bounded by high walls on the Banbury Road, some original and some newer to be in keeping with the suburb.

St Hugh's College

St Hugh's was founded as St Hugh's Hall in 1886 for female students and was the third such foundation at Oxford. This influenced its plan, which breaks away from the more traditional quad with staircases that are a feature of the older colleges in central Oxford. In



1911 St Hugh's became a college by name, and in 1959 a full college.

The College has taken over and adapted a number of 1881 houses in the Woodstock Road for a variety of purposes. To the west of the main building and its 1928 wing the College has built a block of accommodation which nods at the style of the four houses of 1883 that previously stood on the site. Codd's 1872 houses on Canterbury Road have also become part of the College and, while modified, appear to have retained more of their character. The College occupies a 14-acre site and the spacious core offers relief from the developed fringes, although the Maplethorpe and Dickson Poon Buildings both impact substantially on this precious open space.

St Antony's College



St Antony's College was founded as a men's college in 1948 by French shipping magnate, M Antonin Besse and was primarily intended for research and teaching in international studies. The hall is named after his wife, Hilda Besse. The College moved into buildings which had been designed in 1866-8 by Charles Buckeridge for the Society of the Holy Trinity. JL Pearson designed the chapel, which now houses the library, in 1891-4.

The College is located between Woodstock Road and Winchester Road. Behind its high walls, the original convent was surrounded to the north and east by generous open space,

which has gradually been swallowed up with expansion. The newest addition to the College's Estate is the metal-covered tunnel by the late Zaha Hadid at the Middle East Centre, which contrasts dramatically with Buckeridge's buildings in coursed-rubble and Drinkwater's listed Tudor-style vicarage for the Church of St Philip and St James.

Wolfson College



Wolfson College was one of two colleges founded by the University in 1965 in response to a 40% increase in graduate student numbers over five years. Generous benefactions secured by the first President, Professor, later Sir Isaiah Berlin, from the Wolfson Foundation and Ford Foundation in 1966 enabled the construction of a new college to accommodate members of the academic staff who had no college fellowship and graduate students, the majority of its membership originally coming from the sciences; the college admitted its first students in October 1968. It is now the largest postgraduate college with generous family accommodation within its 11-acre site.

The college makes a discreet impact on the Bardwell Estate character zone. It benefits from its location adjacent to the River Cherwell, the landscape broadening and giving the college a rural feel despite the proximity of the Northern Bypass (noise) and the busyness of Marston Ferry Road which leads to a key junction on the bypass. Facing Wolfson are New Marston Meadows designated as a Site of Special Scientific Interest (SSSI),

but are also maintained as a working farm. By the river is the College's Nature Reserve, featuring wildflower displays during May and June, as well as actively maintained hay meadows.

Green Templeton College



This, the University's newest college, was created in 2007 by merging two earlier 20th-century foundations, Green College (1979) and Templeton College (1959). Templeton College, which specialised in postgraduate business studies, moved from Kennington south of Oxford, while Green College, a specialist postgraduate medical college, has always been based within the buildings surrounding the Radcliffe Observatory. This outstanding building with its ancillary buildings is something of an anomaly in the Conservation Area. They are now a major focal point within the University's developing Observatory Quarter. The Observatory impacts more on the Walton Manor and Jericho Conservation Areas, and may better be considered within the Central Oxford Conservation Area.

Boundary treatments

Brick walls



Low brick walls topped by railings and/or coping bricks define front boundaries of domestic properties throughout most of the Conservation Area except where feather-edged fencing is used in the last land to be developed (Bardwell Estate). Corner sites have high brick walls screening service areas and back gardens.

Stone walls

Stone walling is rare and primarily associated with ecclesiastical or college buildings. Apart from the ashlar wall at the Radcliffe Observatory, the stone walls are constructed from coursed rubble.

Iron Railings

The Oxford Preservation Trust and City Council publication *North Oxford Railings: a guide to design, repair and reinstatement*



outlines the importance and development of iron railings in the Conservation Area. The guide identifies four phases of development and styles of railings. Phase one is the oldest and is to be found in Park Town (1850s and 1860s). Phase two covers the Norham Manor estate, the corresponding part of the Banbury Road, and the roads around North Parade (1860s and 1870s). Phase three is to be found to the west of the Banbury Road corresponding to the St Margaret's and Kingston Road character areas (1880s). Phase four (1890s) is to be found in the northern part of the Conservation Area.

All railings stood on a low brick walls, some with half round coping bricks. Most original railings were lost during World War II. Many are now being reinstated with modern replicas.

Feather edged board fences



Feather edged unpainted board fences were used for boundaries in the northern half of the Bardwell Estate character area (i.e. Linton Road, Belbroughton Road and the stretches of Charlbury Road and Northmoor Road linking these two). This reflects a change in architectural style to a more Arts and Crafts aesthetic in the early twentieth century. These wooden fences stand on low brick walls, usually no more than two courses, sometimes with a half round cap. Front fences stood approximately four feet tall, side fences approximately six feet. In some instances fences have a scalloped upper edge, though a horizontal rail along the top is more

common. Many gateposts remain, though surviving gates are rare.

Building styles, materials and colours

Styles

The 19th-century stylistic battle between the Classical and the Gothic can be fully appreciated in North Oxford, with the latter appearing to be the more dominant of the two. Street worked in the Early English style on St Philip & St James, and the houses of the 1860s, 1870s and into the 1880s reflect a domestic variation on this with elaborate Gothic doorways, Gothic windows and steeply pitched gables. Some houses betray the influence of Ruskin, particularly in the Venetian details of large staircase windows that dominate the main façade in some instances. The Romanesque style appears in a handful of buildings from St Andrew's church through to 30 Norham Gardens and 54 Banbury Road.

The Italianate style is most evident in the work of Samuel Lipscombe Seckham. Park Town is an outstanding example as are 7-19 (odd) Banbury Road and 121-123 Woodstock Road, which are unlisted. Roofs overhang on large brackets, while façades are stuccoed or cement-rendered.

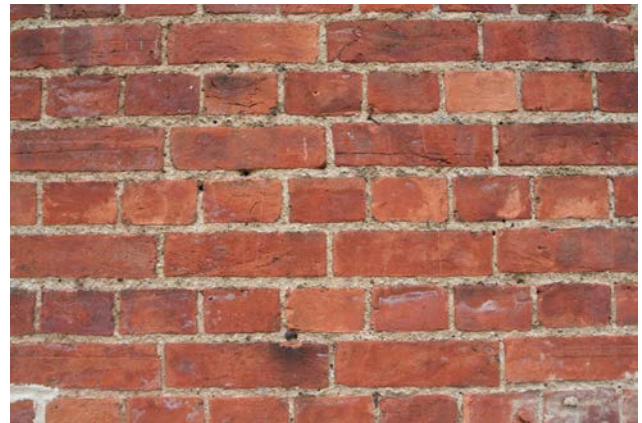
The evolution of the Arts and Crafts style is visible in various parts of the Conservation Area. The Queen Anne style can be seen most notably at 21-29 (odd) Banbury Road but also in the fringes of Norham Manor and in the Bardwell Estate. The latter has many Arts & Crafts influenced houses, and these too can be seen in the streets linking the Banbury Road to Woodstock Road north of St Hugh's College.

The various styles of the interwar period can be seen particularly in the Bardwell Estate, where the houses are characterised by a range of details. While Modernism is notable for its absence among domestic

buildings, at the same time houses in the Arts & Crafts tradition clearly use new materials, chiefly in metal window frames and panelled doors. Some college buildings display Neo-Georgian characteristics, but the later 20th-century is marked by Brutalist academic or purpose-built accommodation buildings, some refined and others less so.

Materials

The primary building material is brick – red or yellow, with occasional use of burnt (blue) bricks for decoration. Typically, English bond is used. Tumbling brickwork is seen on some chimney stacks. Some of the Queen Anne style buildings have prominent terracotta decoration.



Tile-hanging is a feature of some of the late Victorian and Edwardian houses, used to strengthen the 'garden suburb' by expressing a vernacular idiom. Where they survive, pathways in a pattern of coloured tiles are most noticeable – in the terraces with small front gardens as well as some medium-sized late Victorian and Edwardian housing.



The early 19th-century buildings tend to be rendered in painted stucco, whereas rough-cast render is used on the Arts & Crafts styled



buildings. Roughcast is also used, presumably a later addition, on one of the oldest buildings in the Conservation Area, the Royal Oak Public House in Woodstock Road. Some pargetting is used as a decorative treatment on some of the late Victorian and Edwardian houses.

Stone as the primary building material is rare in the Conservation Area, and is seen in prestige ecclesiastical buildings, listed walls, the Radcliffe Observatory buildings and a handful of private houses. For the most part coursed rubble is used. Ashlar is used on the late 18th-century buildings in the Radcliffe Observatory Quarter, notably on 89 Banbury Road and as dressings on many college buildings. Stone steps lead to raised ground floors on many houses. Many houses carry sculptural decoration in stone on window surrounds and/or carved capitals. Even the lintels above the ground floor openings of the modest terraces in Hayfield Road carry sculptural ornamentation.

Pre-cast concrete is much used in late 20th-century college buildings.

The predominant roofing material is clay tiles, with slate used in many buildings from the early 19th-century onwards. One or two terraces on the western side of the suburb are roofed with pantiles.

Where it occurs, timber decoration is applied rather than structural although St Giles Terrace and the Royal Oak all show internal use of timber framing. Some of the Queen Anne Revival buildings carry timber lanterns and balustrades. Many houses have timber porches. 3 Belbroughton Road is a rare example of weather-boarding. A few houses have timber canopies to carry external window blinds.

Gee's Restaurant is notable for its iron and glazed construction. Some houses still display what appears to be fine leaded and coloured glass.

The iron railings and original lamp posts that survive, made either at Lucy's Eagle Works foundry in Walton Well Road or by Dean & Son, give the Conservation Area much of its character. Elaborate ironwork is used to great effect on many of the doors in Norham Manor character area as well as in some houses in Banbury Road. Many large houses particularly in Norham Manor sprout attractive and astonishing finials.

Colours

The predominant colours in the Conservation Area are red (brick) and yellow (brick and stone). Most stucco is painted in an off-white colour with one or two examples of primrose yellow appearing in the vicinity of North Parade. Windows are generally white-painted. Original doors are normally painted red, black or white, but some newer doors use early 21st-century gun-metal grey. Also ubiquitous is the use of black for Conservation Area lamps and railings – where lamps still carry a soft grey-green colour, they harmonise better with the intended ambiance of a suburb.

Listed buildings

The Conservation Area as a whole is richly endowed with over 70 listed buildings and structures ranging in date from the 17th century to the late 20th century. Designation has been accorded to most of the building types in the Conservation Area from large detached villas through to terraced housing. Significantly the larger colleges have listed buildings, in the case of Lady Margaret Hall as many as eight. The 20th century is best represented in College-owned buildings. All the listed buildings are designated Grade II except the Church of St Philip and St James, the Radcliffe Observatory and the Observer's house, now Osler House, which are all listed Grade I.

Pre-1850

The oldest surviving buildings are the pair of houses at 42 & 44 Woodstock Road, converted to become the Royal Oak Public House, at their heart 17th-century and altered in the 18th century. St Giles Terrace at 14-36 (even) Woodstock Road dates to the late 18th century; these are timber-framed houses on stone bases with cement rendering and are distinguished by the rhythmic pairing of the entrance doors.

The outstanding listed building is the Radcliffe Observatory (Grade I), begun by Henry Keene in 1772 and completed by James Wyatt. The octagonal tower with a



sculptural relief on each façade executed by John Bacon was based on the Tower of the Winds in the Roman market place in Athens; the design was indicative of the discovery of Graeco-Roman remains at the end of the 18th century. Keene also designed the Observer's House (now Osler House, also Grade I), a three-bay two-storey dwelling built in ashlar like the Observatory itself, to which it was linked by a curving covered way.

The late Georgian period of the early 19th-century is evident in some stuccoed villas on the west side of Banbury Road. 77 and 79 (c.1840 and early 19th-century respectively) are close to the junction with North Parade, appearing to form an imposing entrance into this service street pre-dating the major expansion into the land owned by St John's College. A similar entrance is to be seen in Winchester Road. 89 Banbury Road, formerly The Lawn, is much more sophisticated in plan and execution being set well back from the road in a large plot and built of ashlar.

1850-1900

The first architect, whose work has contributed to the character of the Conservation Area as a whole, was Samuel Lipscombe Seckham. He began the enclave at Park Town in 1853, designated as a group together with his houses of the same date at 68 and 70 Banbury Road which "flank" the entrance from the Banbury Road. The enclave is characterised by large detached and semi-detached villas in an Italianate style, giving way to two fine crescents facing each other across the oval gardens. Further detached and semi-detached villas link the oval space to a third, shallower terrace built from inferior materials, closing the enclave and completed in 1855. Seckham also designed in c. 1855, 7-9, 11-13 and 15-19 Banbury Road, all semi-detached houses in stucco.

A number of distinguished local architects are associated with the release of Norham

Manor land and their works are well represented in the schedule of listed buildings. Amongst them was William Wilkinson (1819-1901), the chief estate architect, who built some of the earliest houses including 7 Norham Gardens in 1862, an important showpiece for the new estate and notable for its use of a domesticated Gothic style as well as 5 Norham Gardens in 1865, which has domestic Gothic fenestration and door archways, as well as the distinctive steeply pitched hipped roofs. In 1869 Wilkinson designed 13 Norham Gardens, a large showpiece house, which he used to illustrate his own *English Country Houses* (1870 and 1875) and which was also illustrated in Viollet-le-Duc's *Habitations Modernes* (1875).



Some 20 years later, Wilkinson, by then in partnership with his nephew, Harry Wilkinson Moore, designed 105 Banbury Road, considered to be a particularly successful example of the Domestic Revival style with its overhanging asymmetrical gables, finely carved stone details and clear definition of the separate elements of the building. HW Moore was responsible for North Lodge in 1862 on Parks Road, a rare 19th-century ashlar building at the entrance into The University Parks and by its inclusion in the Conservation Area a marker for the style and tone of the Norham Manor houses.

One of the most prolific developers in North Oxford in the 1860-70s was Frederick Codd. One of his more successful commissions is considered to be 13 Bradmore Road built in 1870. The yellow-brick house is



characterised by a varied composition with rich masonry detailing, and is an example of a prominent corner position being used to stunning effect contributing significantly to the streetscape. Belonging to 1877 is 19 Norham Gardens, known as Gunfield, which has been altered significantly as a result of institutional use. Other works by Codd can be seen in Banbury Road. 52 Banbury Road (1869) is a yellow-brick house now part of Wycliffe Hall and much altered, while substantial red-brick 59 Banbury Road stands out from its surroundings because of its employment of materials and styles which combine elements of a continental, French style with those of the emerging Arts & Crafts Movement. 66 Banbury Road is another large and striking yellow-brick house of 1869 in a prominent street-corner position.

Contrasting with Codd's house now forming part of Wycliffe Hall, is the Ruskinian red-brick Romanesque of John Gibbs at 54 Banbury Road (1867), also part of the theological college. Wykeham House at 56 Banbury Road (1866) is also by Gibbs and much altered. 62 Banbury Road of 1864 by E G Bruton is listed as a fine example of a mid 19th-century house, the entrance doorway incorporating sculpture by J H Pollen.

Another major contributor to the streetscape was Charles Buckeridge (1832-73), a pupil of Sir George Gilbert Scott. He designed 3 Norham Gardens in 1866, a finely detailed yellow-brick house of a strong

Gothic character with an early extension (1895) typical of the North Oxford pattern. 9 Norham Gardens (1862-63) by contrast is in red brick with stone dressings and designed in High Victorian Gothic. Buckeridge's major contribution was the conventual buildings for the Society of the Holy Trinity in 1866-68 on Woodstock Road, which became St Antony's College in 1948. The main block of nine bays is built of coursed rubble, marking a deliberate contrast with the brick-built domestic villas and housing in the rest of the suburb. In 1880 J L Pearson added the austere Chapel, now used as a library, deploying coursed rubble and adopting a simple lancet style.



One of the most distinguished 19th-century architects to work in North Oxford was G E Street (1824-81), who was for many years the Oxford Diocesan Architect. To him came the commission in 1862 to build the Church of St Philip and St James (Grade I) on the Woodstock Road (now used as the Oxford Centre for Mission Studies). It is considered one of his most important works. It was intended to provide a landmark within the new suburb, its broach spire terminating many views from within it. Like St Antony's (above), it is built of coursed rubble relieved with bands of brick.

The vicarage at 68 Woodstock Road was built some 25 years later to designs by HW G Drinkwater, a local architect. A Tudor-style building, it is distinguished by a cross wing,

hall and oriel and good detailing. When listed it was felt that it added considerably to the setting of Street's church. Drinkwater's contribution to the suburb can also be seen in the Church of St Margaret (1883-93) and in the adjacent vicarage there (1884). The large church was built as a chapel-of-ease to Saint Philip and St James to accommodate the growing population in this part of north Oxford as the terraces on the western side of the suburb increased. A porch intended to form the base of a tower was added by Bodley in 1898-99.

The development of the western part of the suburb is marked by the early terraces for artisans (1870-73) of Clapton Rolfe, of which three groups are listed: 114-38, 149-156 and 159-164 Kingston Road (all consecutive). These are influenced by the polychromy of Butterfield and were illustrated in *Building News* (1870), cited in Beteman's *First and last loves* (1952) as demonstrating the influence of Norman Shaw. A grander terrace of 1883 built by the Curtis Brothers can be seen 11-25 (odd) Walton Well Road, adjacent to Lucy & Co's Eagle ironworks founded in 1826. The terrace is enlivened with tympana over a first-floor sash illustrating scenes in the life of Elijah. It is notable for the complete set of marginally glazed sashes (unusual for this late period) and the original door features with side lights and glazed over lights.



An early essay in the Arts & Crafts style was seen in Codd's design for 59 Banbury Road and the continuing northward expansion of the suburb saw further examples being built.

Nearer St Giles however are two interesting examples of the Queen Anne Revival, in two houses by Sir Thomas G Jackson (1835-1924) at 21 Banbury Road (1879) and 23 Banbury Road (1896). Jackson, who had been articled to Sir George Gilbert Scott, designed a number of buildings across the city. 21 Banbury Road, designed as the Girls' High School,



is notable for its red brick rendered with terracotta mouldings. 23 Banbury Road has tall chimney stacks and a mansard roof with Dutch gables containing Venetian windows.

1900-1970

There are many speculatively constructed villas dating to before the First World War in North Oxford. The pair of semi-detached houses at 2-4 (even) Charlbury Road of 1908-09 by Stephen Salter in the Domestic Revival style is imaginatively composed on a U-plan with a massive hipped roof rising behind gabled side wings and descending cat-slide over porches in the angles. Moberley's 7 Linton Road (1910) occupies a corner plot, and is styled like a miniature country house, with finely graded brickwork, cornice and roofscape outside, and great dignity on a very compact scale within. Other quality examples can be seen at 20 Northmoor Road designed in 1903 by Edward Allfrey and 121 Banbury Road, also of 1903, by Henry T Hare (1860-1921), which stands out by virtue of its sophisticated composition, evoking a Restoration style, with fine brick and window details as well as pargetting; Hare's

contribution to other buildings in Oxford is significant.

Belbroughton Road was developed between 1924 and 1931 with detached middle-class housing, mostly of only two storeys. It is therefore one of the latest original developments in the Conservation Area. Christopher Wright's houses are of especial interest for their re-examination of later C17 themes and proportions in a modern context. His house at 1 Belbroughton Road (1925-26) has merit for its three giant brick arches, the rendered infill walling articulated by ground floor piers and entablature. The late 17th-century style is continued by the tall hipped roof, dormers and symmetrical tall chimney stacks. Fred Openshaw's house of 1924, 20 Northmoor Road, was built for Basil Blackwell and became the home of JRR Tolkien in 1930, who wrote *The Hobbit* and the majority of *The Lord of the Rings* while living there. Its significance is more historical than aesthetic.



The interest of the listed college buildings lies in their interpretation, in some cases refutation, of the Oxford paradigm of quadrangles, and for their contribution to the development of 20th-century architecture in an academic environment. Their relationship with their environment is also interesting, particularly at Wolfson where the architects designed a bridge to link it to the meadows adjacent to Marston Brook and to a footpath along the river, leading to the University Parks.

At Lady Margaret Hall, located within Norham Manor, the earliest listed building is the Old Hall at Lady Margaret Hall (1879). Originally a house, it was soon extended to form the basis of the first college for women. Sir Reginald Blomfield (1846-1942) appears to have been the architect of choice when he designed additional wings: the Wordsworth Building (1896) in the Dutch style, The Talbot(ing) in 1909 in a 17th-century French style, the Toynbee Building (1915) in a Georgian manner and finally in 1920 the Lodge Building in the same style as the Toynbee Building which links the Old Hall with the new ranges. Sir George Gilbert Scott added the distinctive Byzantine-style Chapel in 1933, which leads off his Deneke Building of the same date. Enclosing the Wolfson Quad at the front are two wings designed in 1959-61 by Raymond Erith, containing rooms, entrance lodge and the Library with Diocletian windows at top storey level.

St Hugh's occupies the south-eastern corner of the St Margaret's character area. The College Main Building and separately listed Lodge and Gates were designed in 1914-16 by Buckland and Haywood. The plan is



of interest for varying the standard Oxford staircase system, reflecting its foundation for women only. The simple Neo-Georgian style is enlivened by Baroque entrance/chapel block, with rusticated quoins, pediments, carved doorcase and lantern, and enhanced by the grouping with the ashlar lodges. The garden front is consciously more gracious.

The 1928 extension is attached by a single-storey link and is matching in style. Near this extension is the Kenyon Building, dating to 1964-66 by David Roberts, one of the first architects to specialise in designing university buildings in a modern idiom. Historic England argue that this is his most accomplished building showing the influence of Louis Kahn. The building is a block of study bedrooms on a staggered V-shaped plan around a central stairwell. At the south-west corner of the college grounds is The Principal's House, 72 Woodstock Road, an altogether earlier building dating to c. 1850, of coursed rubble with part rendering and ashlar dressings and coigns.

The work of Howell, Killick, Partridge and Amis can be seen in two colleges within the North Parade character area. The lead architect was John Partridge (d.2016), whose Wolfson & Rayne Buildings at St Anne's College (1960-69) and Hilda Besse Building at St Antony's College (1966-71) are considered to be among his finest works. Both employ pre-cast concrete and at St Anne's board-marked site cast concrete. The Guardian obituary (30 July 2016) describes how Partridge detailed "the chocolate bar façades of his Oxford designs to shed water cleanly", which he apparently dubbed "elevational plumbing", thus displaying both creativity and pragmatism. These are additional buildings at both colleges. Hartland House at St Anne's dates to 1937 and is by Sir Giles Gilbert Scott. The earlier buildings at St Antony's College are described above.

Outstanding 20th-century architecture can be seen in the Bardwell Estate at Wolfson College by Powell and Moya (1968-74) with later extensions (excluded from the listing) in sympathy with the original from 1992 onwards. Here reinforced concrete on piled foundations has been used to develop "a fluid, informal composition of open and enclosed spaces connected by covered walkways" giving it a powerful affinity with its setting beside the river.

Structures

While the majority of the listed buildings are residential or institutional, there are a few notable structures within the Conserva-



tion Area. The largest of these is the former plant shop in Banbury Road, now Gee's Restaurant (1897), in the form of a conservatory. The 18th-century ashlar boundary wall enclosing the Radcliffe Observatory campus is separately listed as is the coursed rubble boundary wall surrounding St Antony's College that is contemporary with the main building. The two brick-built canal bridges within the Conservation Area date to c.1790 and emanate from the Office of James Brindley. The stone Walton Well Drinking Fountain (1885) occupies a key street corner and is an eye-catcher on entering the Conservation Area over Walton Well Road bridge. There are two surviving letterboxes of 1865 in Park Town and at the junction of Farndon Road with Warnborough Road.

Significant non-listed buildings

An exercise by Historic England (as English Heritage) at the beginning of the 21st century identified and secured the listing of many more buildings within the Conservation Area in recognition of their national importance. The focus at the time appears to have been buildings deemed to be significant examples of particular architects' work or in some instances associated with significant individuals, e.g. Tolkien at 20 Northmoor Road. Since the exercise was undertaken, the *Conservation Principles* (2008) provide four criteria, which permit objective evaluation of significance as a way forward: evidential, historical, aesthetic and communal. Appendix C lists buildings which are deserving of further consideration either nationally or locally to avoid degradation or loss.

Norham Manor

The listing exercise described above was effective in enhancing the protection of many more of the large villas belonging to the first phase of the suburb's development. However, an opportunity to secure the listing of some houses as a group appears to have been missed. While 13 Bradmore Road (Codd 1871) was listed, it ought to have been possible to include 14-16 Bradmore Road in the list description as a cohesive example of his work here: taken together the four houses have an impact on the street because their building line steps back just as the road itself curves away from their boundaries, fostering the illusions of breadth and tranquillity.

In Norham Gardens 3, 5, 7 and 13 were added to this list in addition to 9 and 19. Despite later additions along the street, 11 Norham Gardens by Wilkinson (1867) is a significant two-storey house with basement and attic rooms and an impressive entrance angled at 90 degrees to the street.

Bardwell Estate



One of the most significant unlisted buildings in the whole Conservation Area is the three-bay, gabled Cherwell Boathouse, built by Thomas Tims, the University Waterman, in 1904. It is half-tile-hung with distinctive tiled “hoods” above the first floor openings that contain baroque nautical references.

The Church of St Andrew makes a significant contribution to the streetscape where Linton Road crosses Northmoor Road. Designed in 1907 by A R G Fenning in a robust Neo-Romanesque style, it has a large nave with west transepts, aisles and apsidal end. A recent, contrasting ground floor extension (2012) wraps around the west end like a narthex, and leads to a discreet two-storey extension set back on the south side, abutting gardens in Northmoor Road.

The 1920's housing of Belbroughton Road is primarily by Christopher Wright. No 1 has been listed, and others on the same side of the street would have merited listing as a group. No. 3 is part weather-boarded and built on an L-shaped plan. Many, like Nos. 5 and 9 (by Fisher & Trubshaw), retain original metal-framed windows, front gardens and low walls.

Other houses in the character area are noteworthy, and perhaps the most deserving for local listing are 11 Chadlington Road, a substantial detached house of 1908 by

F Mountain with rubble ground floor and roughcast render with timber detailing; 22 Charlbury Road (1910), a redbrick house by NW Harrison, with deep overhanging eaves and elaborate brackets; 29 Charlbury Road (1914), a miniature Elizabethan manor house, also by Harrison, in roughcast render with stone dressings set into its plot at an angle; and 18 Northmoor Road, a stuccoed Neo-Georgian house by T Rayson (1957), representing a departure from other styles in the Conservation Area.

Kingston Road

Kingston Road itself derives much of its character from the terraced houses interspersed with semi-detached buildings of varying sizes and elegance, before giving way to taller houses with characteristics more common with the eastern part of the Conservation Area. The terraces on the east side of the north-south street, cited by Betjeman and illustrated in *Building News*, have all been listed. However other terraces, all from the 1870s, stand out for local recognition including 22-27 (consec), built by J Horne, where paired Gothic windows at first floor level are situated above projecting bays of four Gothic windows with stone dressings; 35-40 (consec), an austere terrace built by Holt, where doors within Gothic arches are paired and the living spaces are defined by two narrow windows on both storeys; and 106-111 (consec), built by Wheeler and almost a red-brick essay looking towards the style used in the listed terraces towards the city centre.



Within the character area the terraced houses at 47-53 Leckford Road (1876), built by Walter, display a simple integrity with two generous windows at first floor level above the front doors and a projecting bay.

St Margaret's

The terraced housing in Hayfield Road, designed by HW Moore and mostly built by Kingerlee, makes an outstanding contribution to the character area. Built in clusters of eight houses per block and dating to 1887, Nos. 3-73 (odd) and Nos. 8-90 (even) display small, fine details such as the carved floral decoration above each door, the pattern of alternating paned windows with sheet windows per pair of houses in each group of eight, and the slate roofs. Some houses retain their original front doors intact or with minor modifications.

Easily missed at 30 Polstead Road is St Margaret's (Working Men's) Institute, serving the local community as a resource since being built in 1891. Rather than making a conspicuous statement about it being a community centre, the architect (HW Moore perhaps?) designed this first building in the street to resemble a pair of semi-detached houses that blend into the tree-lined street, its primary entrance being the only manifestation of the building's purpose.



78-82 (even) Woodstock Road are three large, two-storey red-brick houses with basements and attic rooms now owned by St

Hugh's College that have been modified to make them suitable for academic purposes. 78 (1885) is by Pike & Messenger, while 80 (1886) is by Edis. 82 (1896) is by Moore.

Banbury Road

The buildings in Banbury Road serving as the end stop to the south entrance into North Parade are notable. 65-67 (odd) form one group and are 2-3 storeys high, stuccoed and set back from the street on the same line as Gee's Restaurant (listed). 69-75 (odd) form a second group of two storeys with dormers in the attic; ashlar-faced they project forward. Both groups are probably early 19th-century.

Lathbury & Staverton Roads



In this area of smaller semi-detached houses, 1-3 (odd) Lathbury Road by Mountain in 1905 stand out for displaying an Arts and Crafts style as used by Voysey in some of his early works, notably Perrycroft (Colwall, Herefordshire), with its timber-framed gables, roughcast render and prominent buttresses. The first floor semi-circular windows with sunbursts radiating above them could be deemed to pre-figure Art Deco, while the brick aprons beneath the first-floor windows are also distinctive.

Listed parks and gardens

Within the Conservation Area, in addition to designation for its buildings, Park Town is Grade II listed on the National Register of Parks and Gardens. Significantly the listing comprises the planting schemes at the semi-circular entrance from the Banbury Road, the central garden reserved for residents and the semi-circular 'wilderness' in front of the raised eastern terrace as well as the street linking all three.

Although only adjacent to the Conservation Area, the University Parks are also Grade II listed on the National Register. Views towards the Conservation Area can be obtained from the Parks and the Grade II listed Lodge on Parks Road is situated both in the registered park and within the Conservation Area.

Summary

Views

Views are generally confined to streets and are shaped by the presence of deciduous trees in gardens. There are few eye-catchers.

Building types

Predominantly residential buildings remain the special feature of the area. The residences are typically large detached or semi-detached buildings that contrast with the modest terraced houses on the western side of the Conservation Area. Several houses are now in multiple occupancy or have been adapted for institutional use. There are a range of purpose-built institutional buildings primarily for the University but also for a handful of schools. Three large ecclesiastical buildings are special to the area.

University Colleges

Six colleges have their primary administrative address within the Area, of which three were established as women-only colleges. Other colleges have specialist departments

or residential accommodation in the Conservation Area. Colleges, the University as a whole and some schools have 'colonised' some of the large houses.

Boundary treatments

For domestic properties the primary boundary treatment is a low brick wall at the front topped by railings or fencing depending on the phase of development. Stone is rarely used and tends to be confined to ecclesiastical and college buildings.

Building styles, materials and colours

Building styles are predominantly Gothic, Italianate or Arts & Crafts, with the 20th-century houses displaying a range of vernacular touches. Materials tend to be brick, red or yellow, or rendered in stucco or roughcast. Stone is rare outside ecclesiastical and institutional buildings, although it is widely used for sculptural relief. Interesting metalwork is visible throughout the Conservation Area.

Listed buildings

There are 73 listed buildings and structures, almost all designated Grade II with the Radcliffe Observatory, Observer's House and St Philip and St James being the notable exceptions at Grade I.

Significant non-listed buildings

Several buildings enhance the Conservation Area by reason of their architecture or their association with notable people from the University and elsewhere.

Listed parks and gardens

There is one Grade II listed garden within the Conservation Area in Park Town, while another, the University Parks, is immediately adjacent to the Conservation Area offering views towards it.

Character areas

Norham Manor

The first and most spacious of the St John's College estates to be developed, the Norham Manor character area lies behind the University Parks east of the Banbury Road. It consists of five broad streets, with planned soft curves in two of them. The first road to be laid out, Norham Gardens, is dominated by large two-storey detached villas with a raised ground floor, well-lit basements and attic rooms. Semi-detached houses feature prominently in the other streets, while Fyfield Road boasts a rare terrace for this side of the suburb.



Spaces

The space is formally laid out as a residential suburb. The entrance to the estate from the Banbury Road is expressed with romantically curved roads, but this becomes a more utilitarian grid inside the body of the suburb. The gaps between gardens are small and sometimes reduced or eliminated by later extensions. This is particularly true on Norham Gardens where institutional owners have closed the gaps with the result that from the public domain one has no sense of the University Parks beyond the buildings to the south. Houses are enclosed by low brick walls. The building plots are large, but the houses almost fill the width of the plots. Front gardens are relatively small in proportion to the size of the houses with large

gardens at the rear. A feeling of space is created in the public domain by the wide roads and pavements and the contribution made by private front gardens. The low boundary walls mean that it is the buildings that define the space. This is originally an entirely residential space. Many of the largest houses have been converted to institutional use whilst others have been converted into flats.

Black asphalt is the ubiquitous paving material for roads and pavements with stone setts at the road edge. Street furniture is at a minimum. Lighting is by means of swan-necked lamp standards in a design characteristic of the area. There is no through traffic, though there is significant on-street parking. Usability of the space is good, though pedestrian surfaces are somewhat rough and ready.

Buildings

The buildings define the character of the area. Large Victorian villas are the characteristic building type. There is a mix of detached and semi-detached residences, with some more modestly scaled houses for example on Crick Road. Building materials are a mix of red and yellow stock bricks, sometimes alternating for effect. Roofs are a mixture of clay tiles and slate. There is an extensive use of stone for features and of sculpted stone ornament. Sash windows predominate with Gothic arches for windows and doors on some of the larger buildings. Doors are typically Gothic in style, planked and bearing elaborate ironwork fittings. Chimneys are very large, elaborate and



prominent, usually on external walls. Tall, acutely pitched gables with finials add to the Gothic character of the buildings. Many of the large houses, often originally built for those who made their wealth in commerce as well as some notable academics, are now frequently in the ownership of institutions and/or multiple occupation. Many continue to serve as private residences. The condition of houses is generally good though over cleaning of brickwork and the replacement of window glass removes the patina of age to the extent that old buildings can sometimes be mistaken for new, thus eroding the special character of the area.

Views



The entrance to the estate is picturesquely designed to create visual interest. Once within the suburb the straight roads create few set-piece views. Perhaps surprisingly, the ends of longitudinal views are not terminated with 'feature buildings' and houses on corners usually face onto the main street rather than exploiting the picturesque possibilities of their corner site. Consequently there are few focal points. In the side streets high brick walls protect the privacy of the back gardens on the end of a run of plots. Nevertheless there are opportunities here for glimpsed views of the space behind the large houses.

The roofs of individual buildings are often interesting and attractive, but there is little

feeling of a roofscape for the area as a whole. This reflects the sense of individual villas on separate plots. Trees in private gardens play a very important role in defining the character of views both along the streets and into the spaces behind.

Landscape

The topography of the character area is generally flat. The area has lots of trees, though front gardens sometimes disappoint either because they have been institutionalised, or because they have been given over to hard standing for cars and bin storage. Although the river is close by, there is no sense of this from within the estate.

Ambience

Activity in the public domain is dominated by cycling, walking and running. The streets are quiet. There is no through traffic so vehicle movements are, to some extent, driven by the timetable of institutions. Trees and other planting gives shade in front gardens, though the road is so wide this sometimes has a limited effect on the public space. The sound of distant traffic and aircraft can be heard, but it is generally so quiet that the sound of private conversations is easily discernible.

Summary

Key positives

- Retained and restored railings
- Trees
- Quiet roads

Key negatives

- Inappropriate modifications
- Over cleaning of brickwork
- Loss of front gardens

Park Town



Park Town is very different from all other parts of the Conservation Area. Its narrow plot lay outside of the St John's College estate. It was developed to a planned scheme in 1853. Houses are rigorously laid out in a very formal development. The entrance to the estate off the Banbury Road is in the form of a crescent around a small unenclosed garden. The first third of the site is taken up with large detached villas in substantial gardens on either side of the road. At the heart of the development an elliptical railed-off garden for residents is flanked on the north and south sides by a crescent of terraced housing. The road continues west, now flanked by semi-detached villas. The site is closed at the east end with a crescent of houses facing onto another small unenclosed garden. A gateway through the middle of this crescent leads into Dragon Lane.

Spaces

The area is very clearly defined. Buildings and roads are laid out formally and geometrically. There are few gaps between buildings or blocks of buildings. Plots are enclosed by iron railings, some original, others replicas to a similar design. The space in front of the crescent terraces is defined by railings with the space behind allowing light to reach basement windows. Detached and semi-detached houses, in contrast, have substantial gardens front and back. The space in front of the rear terrace is confined by the 'wilderness' planting of the garden. The raised

pavement reduces the feeling of space by effectively dividing the area so emphatically between the roadway and the pavement. Where the crescent terraces at the heart of the development face onto a communal garden the feeling of space is lost on account of the large number of mature trees and the dark hedge and other planting behind the railings which eliminates what might otherwise be a feeling of light, space and openness.

The area is exclusively residential. Road and pavement surfaces are asphalt in a poor state of repair. Street furniture consists of black Victorian style street lamps, black railings and a Grade II listed Penfold Pillar box.

There is very little motor traffic as there is no through road, however, street-parked cars have a significant impact on the space.

Buildings



The buildings are the dominant element in defining the character of the area. They are almost all of the same period. The wealth, aspirations and social status of the original occupant of each zone of houses is on display in the architecture. Design, style and materials are deployed to emphasise the status of the zones within the character area. A uniformity of scale is achieved by grouping the smallest houses into monumental blocks, the medium sized houses into semi-detached pairs and the larger houses standing in individual plots. Materials too are used to communicate messages about status. The

terraces at the back of the site have yellow stock bricks above a ground floor with rendered, banded rustication. Their front doors open directly onto the raised pavement. In the two crescents around the elliptical garden the upper storeys are faced in dressed stone, the wells, allowing light into the basements, are enclosed by railings.

Views

Views within the character area are very constrained. This is partly as a consequence of the design and layout of the site, but also as a result of private hedges, the management of planting in communal areas and the growth of ageing trees. Views are now rather short though Park Town was designed to have long views along the length of the site and panoramic views of the crescents. Designed focal points are hidden by substantial arboreal growth.



The streetscape, particularly in front of the crescents is dominated by parked cars. There is little in the way of a roovescape. Roofs of the terraces are largely invisible. Individual houses and semis have shallow pitched roofs with projecting eaves. The mature trees and hedges give an arboreal character to what would otherwise be a formally designed urban space. The development is entirely inward looking with few views out of the space.

Landscape

The land is entirely flat. The private gardens of the larger houses and the communal greenery in front of the terraces contribute to a verdant atmosphere in a formal architectural setting. Hard landscaping is generally poorly maintained asphalt

Ambience

This is a quiet enclave with only light local traffic. The space is used comfortably by pedestrians and cyclists who are able to filter through to Dragon Lane which cars cannot access.

Summary

Key positives

- Quality of the buildings
- Retained and restored railings
- Quiet roads

Key negatives

- Parking
- Hedges encroaching on railings
- Poor quality road and pavement surfaces
- Obstruction of views across communal spaces



Bardwell Estate



The Bardwell Estate character area consists of the area of development east of the Banbury Road and north of Park Town. The character area therefore encompasses the last parts of the St John's estate to be formally laid out as residential development, using allotment gardens on land sloping down gently towards the river. Bardwell Road itself was developed in the 1890s. North of Bardwell Road as far as Linton Road dates from before the First World War while north of Linton Road as far as Belbroughton Road was developed in the 1920s. More than any of the other character areas, the feel of the Bardwell Estate equates with received ideas about suburban style, in part due to the more modest height and massing of its buildings and the appropriate scale of the trees and shrubs. An idealised vernacular prevails, not always rooted in Oxfordshire styles, and reminiscent of the Lake District and other prestigious areas with a strong Arts & Crafts tradition.

Spaces

The roads are set out in a formal grid with only a slight curvature introduced in Northmoor Road and to a lesser extent, Charlbury Road. Houses are large with only small gaps between on the main street frontages, though larger gaps are sometimes found on side roads at the end of a run of houses. Most houses were originally enclosed on the front by feather edged board fencing, often standing on a low brick wall of only three courses. Some of the original

boundary treatments survive in various states of repair. Some have a straight top edge, in others each board has a rounded top giving a scalloped effect. There are a number of instances where iron railings and brick piers have been inappropriately introduced.

From the street building plots seem small for the size of the houses, there are however, large spaces behind houses. There are no public open spaces. A general feeling of space in the public realm is created by the broad roads, pavements and front gardens. The contribution of gardens is greatest where the original modest height of front boundary treatments is retained. Sometimes excessively tall fences or hedges create a more enclosed feeling. Where the streets are straight, the building lines, boundaries and road edges all reflect this characteristic.

Road surfaces and paving materials are disappointing. Asphalt is ubiquitous, not always in good condition. Pavements are edged with stone kerbs with stone setts in the gullies. Street furniture is confined to swan-necked street lamps (green or black) and the occasional pillar box. Motor traffic is relatively light outside of 'school-run' hours. There is some on-street parking (not necessarily residents) and considerable amounts of walking and cycling.

Buildings

The space is largely defined by its houses which are generally large and detached.



The vast majority date from the first half of the twentieth century, and it is the style of this period that creates the character of the area. Materials are generally red brick with stone dressings and details. Roughcast render is common, sometimes this has been painted. Clay tiles are ubiquitous for roofs and some wall-hung tiling. Ridge tiles are often decorative. There is extensive use of painted barge-boards and other decorative details. Fenestration is very varied, there are examples of sash windows, sometimes with multiple glazing bars. In other styles of house, casements with leaded lights contribute an arts and crafts character; in the 1920s houses windows and their frames are metal for the most part, possibly by Crittall. Doors tend to be squared, part glazed and panelled. Chimneys are large but simply constructed in red brick. The area was originally entirely residential. Some houses have been colonised as school or university buildings. The Neo-Romanesque church of St Andrew sits on a prominent corner, though its character and massing has been somewhat undermined by unsympathetic extensions.

Views

The grid-like street pattern means that there are no particularly picturesque set-pieces. Views are generally channelled along the usually straight streets. There are occasional diagonal views between buildings into the space behind. Views out of the area to the Banbury Road do occasionally frame a large house there. In the streetscape, parked cars and trees are the dominant elements. The roofscape is characterised by clay tiled roofs with steep gables and occasional hips with tall brick chimneys. Mature trees and planting in front gardens dominate views, often obscuring diagonal views of houses. Views out of the space are onto college campuses, playing fields and on the west side the busy Banbury Road.

Landscape

The topography of the area is flat or gently sloping. The landscape character is of a leafy and green garden suburb. However, all trees and planting are confined to private gardens, the public domain makes no contribution to this. Consequently these gardens are particularly significant for the character of the area. Where gardens have been converted for parking of cars and cycles this can have a negative impact on the quality of the area.

Ambience

Activity within the area varies with time of day and year. The dominant activities are associated with the suburbs residential character. The low density results in low levels of activity in the public domain. Schools and university buildings run to a different rhythm with peaks of activity in term-time and related to the delivery and collection of children by private car or coaches. There are strong contrasts of light and shade and periodic noise from cars and aircraft.

Summary

Key positives

- Front gardens where retained
- Trees
- Quiet roads

Key negatives

- High front garden fences
- Inappropriate modification and enlargement
- Loss of front gardens
- Inappropriate boundary treatments
- Parking
- Poor quality surfaces

Kingston Road



Kingston Road abuts the Walton Manor Conservation Area and is characterised by a variety of terraced housing interspersed with semi-detached villas. These were deliberately designed as speculative and attractive residences for a growing artisan and clerical clientele. The plots are narrower, but where glimpses between terraces and houses permit, the familiar feeling of openness is maintained.

Spaces

Space in the character area is predominantly along long north-south roads. Building plots are narrow with houses typically grouped in terraces of four, six or eight, interspersed with semi-detached residences. The space behind the dense street frontages can be appreciated through a number of gaps between buildings and from positions on the short side roads. Property boundaries on the street frontages are usually low brick walls, often with a rounded coping brick. Some original iron railings survive. Even the smallest houses have front gardens which taken together with the road and pavement create a feeling of space in the public domain.

The area is entirely residential. The north-south roads provide good access into the city centre for cyclists and pedestrians. Cars are limited by effective traffic calming measures. Road surfaces and pavements are similar to

elsewhere in the Conservation Area: asphalt with stone kerbs. Street lighting on Kingston Road is tall, urban and utilitarian, less sympathetic than elsewhere in the Conservation Area. On-street parked cars have a much greater impact here than elsewhere on account of the lack of off-road parking. Bicycle parking too has an impact on the area. There is no public provision, so bikes are tied to railings both within front gardens and on the pavement.

Buildings

Victorian terraces are the dominant building type in the character area, though these vary greatly in size and are often interspersed with pairs of semi-detached houses. The form and style of these houses is very varied, yellow stock brick predominates, often enlivened with red brick for decorative effect. Roofs too vary; slate, clay tiles and occasional pantiles are found here. Many original windows and doors survive, but there is ample evidence of replacement windows degrading the character of the area.



These houses were originally built as homes for artisans and lower middle class families. Today they provide a mix of family residences and houses in multiple occupation. A large number have been extended at the back, often unsympathetically. Side extensions at the ends of terraces often close important gaps between buildings. Corner sites are particularly sensitive, where rear

extensions have a major impact on the public domain.



Views

There is an important view of the spire of St Philip and St James along Leckford Road. The junction of Southmoor Road and Walton Well Road is the focus of several views. Proceeding up Southmoor Road the long view is terminated by the two houses facing down the length of the street. Otherwise views tend not to have a particular focal point. Small gaps between buildings can be important for creating a feeling of openness even though the area is densely developed. There are views into the Conservation Area from the canal tow-path and views along the canal, primarily from the bridges.

Landscape

The land rises quite abruptly from the canal and quickly plateaus. The impact of the canal is limited by being largely hidden behind the easternmost row of houses. Road and pavement surfaces are all asphalt with stone sett kerbing. There are some trees relatively newly planted in the Kingston Road as part of the traffic calming. Most of the trees and greenery is to be found in back gardens.

Ambience

There are few commercial premises in the character area. Most of the activity is transit of one form or another. Kingston Road

provides a convenient and safe route into the city for walkers and cyclists. Motor traffic is moderated by there being no direct through roads and traffic calming limits speeds. Although invisible the sound of nearby passing trains is apparent. The lack of large trees and the limited size of the buildings means that the streets are particularly light.

Summary

Key positives

- High level of preserved historic railings especially in Southmoor Road

Key negatives

- Mismatched skylights in terraces
- Large bins in small front gardens
- High levels of on-street parking
- Bicycles secured to railings and street furniture
- Poor quality surfaces
- Unsympathetic street lighting



St Margaret's



The St Margaret's character area is defined by that part of the St John's estate west of the Banbury Road and north of St Margaret's Road. To the west lies the canal and to the north the St John's College Sports Grounds. The houses are the most diverse in terms of size but the most consistent in their architectural style, materials and detailing. The smallest cottages designed for artisans in Hayfield Road, the modest semi-detached houses in Chalfont Road and the large villas on the Woodstock Road all share a similar architectural vocabulary. This is because the vast majority were built to the designs of Wilkinson and Moore either together (in St Margaret's Road) or Moore alone in the other streets in the character area.

Spaces

The character area is set out on a formal grid pattern. There are no public open spaces. Where there are front gardens these



are enclosed by low brick walls, some with replacement railings on top. Building plots are narrow with even the detached houses occupying most of the width of the plot. Where there are gaps between buildings these are narrow offering glimpses into the spaces behind. Any feeling of space in the public domain is created by the width of the roads and front gardens. Longitudinal space is created by the long straight roads.

Paving and road surfaces are all asphalt. Vehicle movements are controlled by various traffic calming measures. For the most part, what motor traffic there is tends to be slow moving with the result that the space can be comfortably used by walkers and cyclists. There is much on-street parking, particularly in streets of terraced houses.

Buildings

There is a very wide range of house sizes within the character area ranging from terraced cottages near the canal to large detached houses near St Hugh's College. Despite this diversity of size there is a uniformity of design, materials and detailing. All these houses were built from the end of the nineteenth to the early twentieth century. Red brick is ubiquitous with stone used for detailing. Clay tiles are used everywhere except for the terraced cottages in Hayfield Road which have slate roofs. The style is Neo-Tudor with an eclectic mix of classical and Gothic. The smallest terrace cottages have diminutive sculpted scroll pediments over the front door with swags of fruit and foliage. As the houses become larger the sculpture and architectural vocabulary becomes more elaborate. Ball finials crown tall gables. In the detached houses east of the Woodstock Road details include heraldic devices set in elaborate strap work and windows with stone mullions and transoms. Sash windows dominate many with glazing bars in the upper sash. There has been some replacement which is degrading the character of the area. Similarly, many original doors

have been lost, along with their original door furniture. This is particularly obvious in the terraced houses facing directly onto the street. Unusually for the Conservation area there are some semi-detached houses which respond to their corner site by having houses address different streets (e.g. the corner of Polstead and Chalfont Road).

Although the character area is predominantly residential there are other buildings which make a positive contribution to the area. The church of St Margaret, the St Margaret's Institute, the Anchor Public House and shops and commercial premises at the bottom of Hayfield Road give the character area a sense of a community often lacking in other parts of the Conservation Area.

Views

Most of the views are along the streets though views between buildings are also important. The church of St Margaret might have provided more of a focal point if its tower had been completed. There are important views along the canal from vantage points on bridges and from the towing path.

Landscape

The canal defines the western edge of the character area. The slope of the land towards it is evident on the east-west roads, St Margaret's Road, Polstead Road and Frenchay Road. The character area is leafy, with the exception of Hayfield Road where the terraced houses have no front gardens. St



Margaret's and Polstead Roads are unusual in having trees in the public domain lining them.

Ambience

The character area is quiet with occasional slow moving motor traffic. The presence of a mix of housing, if strictly graded from east to west, and the presence of the church, pub, shops and workshops, gives the area a vibrant village feel.



Summary

Key positives

- Village-like atmosphere created by communal building
- Gaps between buildings
- Front gardens where retained
- Trees
- Quiet roads

Key negatives

- Inappropriate modification and enlargement
- Loss of front gardens
- Inappropriate boundary treatments
- On-street parking
- Poor quality surfaces

Banbury Road



Possibly a Roman road originally, the Banbury Road is a major and busy thoroughfare. Here can be found some of the earliest developments within the North Oxford Victorian Suburb as St John's could offer leases easily. Large houses are set back from the broad street, except at the junction with North Parade and with Park Town. There has been some loss and degradation of the character of the street through demolition of houses to make way for blocks of 20th-century flats which neither harmonise with the surroundings nor enhance them.

Spaces

The character area is a longitudinal space along a single road. Historically, development followed the road north out of Oxford. The original houses sit in generous grounds set back from the road, but the space between buildings has often been filled with unsympathetic extensions. Most plots have low brick walls facing onto the street, sometimes with hedges behind. There are some long stretches of characterless modern fencing around institutions.

Space in the public domain is largely used by various forms of traffic. There are high levels of motor traffic, many cyclists and pedestrians. There are also, at some times of day, large numbers of people waiting for buses. Motor traffic has a dominant and negative impact on the space and its usability for

anything other than passing through. Pavements are relatively narrow in comparison to the road space and in the context of traffic speeds. This is not an environment where anyone would linger for pleasure. Surfaces are all tarmacadamed. As this is a main road there are high levels of painted lines on the road and different colour treatments to pick out a bus lane on the northbound side and a cycle lane on the southbound side. Street furniture is utilitarian: high level modern street lighting, utilitarian glass bus shelters and occasional litter bins.

Space in the private domain is almost entirely given over to the parking of private cars. Gardens have been asphalted over to provide parking for staff.

Buildings

Because the Banbury Road is one of the main roads into and out of Oxford its buildings are amongst the most visible in the Conservation Area. Development progressed rather more quickly along the Banbury Road than in other parts of the suburb because it was not necessary to build new roads before development could commence. Sites on the Banbury Road also seem to have been particularly prestigious as houses tend to be considerably larger than those elsewhere in the suburb. Houses date from the mid-nineteenth century to the early twentieth century with the earliest buildings generally at the south end of the road and later ones in the north.



The individualised nature of the buildings is reflected in their materials which are very varied. There is a mix of red and yellow brick, usually with stone detailing. Sash windows predominate with occasional displays of Gothic tracery, particularly at the southern end of the road. Roofs are steeply pitched. Again, a mixture of materials are used, clay tiles and slates.

Originally these would have been houses for an Oxford elite. Now their large size makes them particularly attractive for institutional use. In broad terms those closer to the city centre tend to be in various forms of university use, whilst those to the north house language schools, sixth form colleges and small hotels. This institutional use has had a negative impact on the buildings themselves and their contribution to the Conservation Area. Negative impacts include: office-style lighting, corporate branding (signs, blinds with logos, advertising for open days etc.), unsympathetic extensions (sometimes linking two houses), bins, fire escapes etc.

Structurally houses seem sound, but institutionalised houses often demonstrate a neglect of the history and character of the historic buildings and their setting.

Views

The dominant views are up and down the road. The view into the city is terminated rather abruptly by the Faculty of Engineering building. Occasional side views open up



along side roads, particularly into Park Town.

Landscape

Viewed at a distance the impression is of an arboreal environment, an effect almost entirely achieved by the presence of large trees. There are no trees in the public domain and little soft landscaping at ground level where surfaces are all hard and urban, adapted for the storage and rapid passage of private cars.

Ambience

Banbury Road is a place to travel through not to linger in. Its history and the high status of its former residents can be read in the grand architecture of the Victorian houses now mostly given over to institutional use. Activity levels are high but predominantly associated with transit. There is a mixture of light and shade, trees on private land soften the harsh edges of this urban space. The considerable width of the road and lack of highway trees means that whilst the buildings are often shaded the road is usually well lit.

Summary

Key positives

- Trees
- Quality of buildings

Key negatives

- Institutionalisation of large houses
- Inappropriate modification and enlargement
- Loss of almost all front gardens
- Inappropriate and unsympathetic boundary treatments
- Poor quality surfaces
- Poorly designed modern residential development

North Parade



The character area, which has a distinctly village-like feel, is hemmed in by the Banbury and Woodstock roads, east and west, St Hugh's College to the north and St Anne's College to the south. Almost all of the south west block is occupied by the former convent built for the Society of the Holy Trinity, now St Antony's College, and is thus excluded from this character area, though its tall stone boundary wall adds considerable interest to the street scene and buildings within the site have a significant impact on the environment.

Spaces

The street pattern within the character area is a formal grid. There are many interesting gaps between buildings allowing an appreciation of large spaces behind. Space on the streets varies considerably, North Parade and Church Walk are narrow lanes of very



different character. The other streets are generous residential roads. Whereas in North Parade commercial premises open directly onto the street, elsewhere front gardens are bounded by low brick walls, probably originally topped by iron railings.

Commercial activity is confined to North Parade with a variety of small shops, cafés, pubs and a bi-monthly market. Motor traffic here is largely confined to commercial vehicles though the little on-street parking permitted can result in through traffic becoming impossible. Vehicles frequently reverse back up the one-way street onto the Banbury Road. There is no parking provided for bicycles with the result that bikes are often fixed to street furniture. Paving here is unusual for the Conservation Area, in that concrete pavers of various sizes are arranged in a random pattern. Elsewhere, paving is the usual asphalt and stone kerbs.

Buildings

Buildings here vary more than elsewhere in the Conservation Area. The church of St Phillip and St James with its tall spire is a dominant feature. This contrasts with the small scale shops in North Parade. Houses too are on different scales; those at the centre of the character area being smaller and more densely spaced than the larger houses in Canterbury and Bevington Roads. These smaller buildings around North Parade include the older houses from 1830s-1840s with the larger houses dating from the 1860s-1870s.

The mix of date, style and scale is reflected in the variety of building materials. There are bricks of various types and some stucco. Roofs vary in pitch and materials. Sash windows predominate though there is diversity here too, from Georgian examples with glazing bars and original glass to Victorian Gothic arched openings with large sheets of glass. There are unfortunately many losses to modern replacements with the deadening

perfection of modern industrially produced glass. In North Parade in particular, none of the commercial premises preserves original glazing in their upper storeys. Many buildings have been altered, and some poorly designed rear extensions are painfully visible from the public domain.

In addition to the church (now used as the Oxford Centre for Mission Studies) and commercial premises in North Parade the other buildings in the character area were all built as family houses. Some still continue in this use, though many of the large houses (e.g. at the south end of Winchester Road) have been divided into flats. Houses backing onto St Hugh's College have nearly all been acquired by the college. University departments occupy some houses in Bevington Road. These show all the signs of institutional colonisation: strip lighting, louvre blinds, signage, standardised paintwork, front gardens given over to bins and parking. On the south side of Bevington Road St Anne's College has acquired all of the houses backing onto its campus with the usual issues of institutionalisation.

Views

The spire of St Phillip and St James is the focal point of many views from within the character area. Sadly, some of these views have been harmed by unfortunate modern developments. An extension at the back of one of the houses on Church Walk encroaches on the view across back gardens



from Winchester Road illustrating the harm that relatively modest development can have on important views. The modern garages in the foreground of views from Canterbury Road are similarly disappointing. Winchester Road is wide and straight over most of its length with the side view of the Dickson Poon Building at St Hugh's an uninspiring termination to this vista.

The large spaces behind many of the Victorian houses allow for many interesting views across gardens or between buildings. Where college campuses have developed on backlands north and south of the character area the views through gaps between houses have been blocked by the bland elevations of modern teaching blocks or dormitories. This is particularly brutal in Bevington Road.

The narrow lane of Church Way allows for particularly attractive views. Views along North Parade are entirely different, and when parked cars allow can be equally enjoyable.

Landscape

The large open spaces behind houses are often a reminder of the former market gardens and orchards that used to occupy the area. Trees are, as elsewhere in the Conservation Area, confined to the private domain, but their contribution is significant. In North Parade a hard urban landscape contrasts with the green suburban feel of the surrounding streets. The treatment of front gardens of institutionalised Victorian houses



is harmful to the character of the area. At best a low-maintenance approach has been adopted, more often the front gardens have been used simply as a means of providing parking for members of staff.

- Loss of front gardens
- Parking especially in North Parade
- Poor quality surfaces

Ambience

This is a vibrant part of the Conservation Area. Motor traffic movements are light. The area is extensively used by walkers. Pedestrians are a combination of those attracted to the commercial outlets in North Parade and students and staff walking between St Hugh's College and the city centre, for which Winchester Road provides an attractive alternative to the busy main roads. The presence of the church, shops and occasional market gives the area something of a village-like feel.

Summary

Key positives

- Views of St Phillip and St James
- Large spaces and trees behind houses
- Quiet roads

Key negatives



- Institutionalisation and quality of maintenance of former houses and their gardens.
- Inappropriate modification and enlargement

Lathbury and Staverton Roads



The character area consists of two suburban streets running between the Banbury and Woodstock roads. These streets lay outside of the St John's College estate. The houses were built in the early years of the twentieth century up to the First World War.

Spaces

Lathbury and Staverton Roads have a garden suburb character. The spaces between houses are small where they face onto the street, but where they meet the backs of houses facing onto the Woodstock and Banbury roads there are large gaps, though these have often been filled with later development. Feather edged wooden fences are common.

A sense of space is created by the moderate scale of the houses in proportion to their generous building plots.

These roads do suffer somewhat from being used as cut-throughs between the two main roads, usually by light commercial vehicles or taxis. Though the space is quiet enough for children to cycle accompanied by adults. There is relatively little on-street parking. Road surfaces and pavements are as elsewhere in the Conservation Area, laid in asphalt often in an uneven condition on pavements. Street furniture consists of the usual swan-necked lamp standards.

Buildings

The contribution of buildings in the character area is not so much the architecture of individual houses but the suburban style, apparently informal layout and planning. Where houses address the curving road they are stepped back from one another and at an angle to the road, revealing both front and side elevations. Houses here are somewhat standard Edwardian suburban style, mostly semi-detached. They are on a smaller scale reflecting smaller families and fewer live-in staff. There seems to have been an unfortunate late-twentieth-century vogue for flat roofed garages projecting partially in front of the façades.



Views

The serpentine curves of these roads create a series of relatively short views in which the façades of houses framed by trees feature much more prominently than in other parts of the Conservation Area. Moving along the roads, different houses reveal themselves as the focal point of the view. Trees play an important part in the street scene. Here they are usually more domestic in scale than in the older parts of the Conservation Area. The mix of gables and finials add interest to the skyline. There are few views out of the space other than when one approaches the ends of the street.

Landscape

The land is flat. In the public domain hard surfaces predominate. The feeling of a leafy suburb derives entirely from planting in private gardens. However, front gardens are increasingly being gravelled over for car parking.

Ambience

The character area consists of two residential roads that run between two busy main roads. Individually they have the character of a quiet suburb, but there is no means of communicating between these roads without venturing onto either the Banbury or Woodstock roads. Both Lathbury and Staver-ton Roads are generally quiet. Both are frequented by walkers and cyclists. Motor traffic is only occasional but can be quite fast moving as vehicles use the roads as a cut through. The area is bright and open on account of the modest scale of the trees.



Summary

Key positives

- Front gardens
- Trees
- Quiet roads
- Residential character

Key negatives

- Poor quality surfaces
- Loss of front gardens to gravel and hard standing
- Institutional development south of Staver-ton Road
- Unattractive flat-roofed garages in front gardens, extending in front of buildings.
- Use of roads as a cut through between Banbury and Woodstock roads.

Opportunities for enhancement and change

Designation

- Statutory Listing. There is considerable scope for adding to the statutory list (See Significant unlisted buildings).
- Conservation Area boundary review
 1. There is a case to be made for Bainton Road and perhaps Moreton Road to be included in the Conservation Area. A possible problem is that these roads, whilst worthy of protection, do not really fit with the North Oxford Victorian Suburb. An alternative might be to create a new conservation area consisting of Bainton Road, Moreton Road, Staverton Road and Lathbury Road (the latter two fit uncomfortably within the NOVSCA). They all lie outside the original St John's College estate. The pattern of streets is quite distinct from that of the St John's development. Houses all date from the early twentieth century. These roads have more in common with each other than they do with the NOVSCA.
 2. An argument can be made for merging the Walton Manor Conservation Area into the NOVSCA. The current boundary runs down the middle of Leckford Road, with one side of the street in NOVSCA and the other in Walton Manor.
 3. The Radcliffe Observatory sits particularly uncomfortably in the NOVSCA. It would fit much better with the buildings in the Central (University and City) Conservation Area. A good case can be made for transferring the Radcliffe Observatory and the whole of the area between the Woodstock and Banbury Roads south of Bevington Road into the Central Conservation Area.

Protection for unlisted buildings

Consideration should be given to Article 4 directions to control inappropriate development of unlisted buildings by removing certain permitted development rights, including:

- Inappropriate boundary treatments
 1. Excessively tall front walls/fences/hedges
 2. Inappropriate restoration of replica railings where boarded fencing was the original boundary treatment or railings of an inappropriate design
 3. Introduction of large gate piers and inappropriate automatic gates
 4. Inappropriate use of cement pointing of masonry
- Hardstanding replacing front gardens
- Replacement windows and doors (even replica windows with modern flat glass can adversely impact the character of the Conservation Area)
- Solar panels on street frontages

- Skylights on front elevations (often mismatched in terraces)
- Painting of brick and stonework
- Excessive cleaning of brick and stonework
- Excessive lighting of private houses

Improvements in the Public Domain

- Condition of road and pavement surfaces could be greatly improved
- Appropriate replacement of stone kerbs and setts
- Street furniture:
 1. Some parts of the Conservation Area have over-large unattractive lamp standards
 2. Strategically located public seating would encourage walking
- Permeability of residential roads between Woodstock and Banbury Roads to motor traffic result in their use as cut-throughs by commercial traffic (couriers and taxis). This could be improved to the benefit of residents, walkers and cyclists.

Development Management

Development management offers the opportunity to manage change appropriately, conserve and enhance the special character of the Conservation Area by controlling:

- Changes to the character of the area by institutionalisation of houses
- Large scale backland development
- Inappropriate extensions especially on ends of terraces and blocking gaps between buildings or the joining up of adjacent houses
- The use of planning conditions and other powers to leverage public benefits from institutions and developers

Non-residential use and institutionalisation large houses

The council could work with the institutional owners of former residential properties in the Conservation Area to limit the harm caused to the character and appearance of the area by unsympathetic management of the building, signage and grounds (especially front gardens).

Management of trees

Pro-active tree management is desirable for dealing with aging trees and to encourage succession planting that will help to ensure mature tree canopy cover is sustained

SOURCES

Barrett, H and J Phillips (1993) *Suburban style: the British home, 1840-1960* Boston etc: Little, Brown

Curl, J S (1977) *The erosion of Oxford* Oxford: Oxford Illustrated Press

Dixon, R and S Muthesius (1985) *Victorian architecture* 2nd ed London: Thames & Hudson

Garnett, J and G Rosser, eds. (2013) *Park Town: Oxford's garden suburb* Oxford: Privately printed

Graham, M (1985) *The suburbs of Victorian Oxford: growth in a pre-industrial city* Leicester: Published PhD thesis

Harwood, E et al, eds. (2013) *Oxford and Cambridge* (Twentieth Century Architecture 11) London: Twentieth Century Society

Hinchcliffe, T (1992) *North Oxford* New Haven, London: Yale UP

Historic England (2008) *Conservation Principles* Swindon: English Heritage

Historic England (2011) *Understanding Place: Conservation Area Designation, Appraisal and Management* Swindon: English Heritage

"Modern Oxford" in *A History of the County of Oxford: Volume 4, the City of Oxford* (1979) Originally published by Victoria County History, London [<http://www.british-history.ac.uk/vch/oxon/vol4/pp181-259> Accessed 15 December 2016]

Oxford Preservation Trust (s.d.) *North Oxford railings: a guide to design, repair and reinstatement* Oxford: OPT and OCC

Service, A (1977) *Edwardian architecture* New York etc: Oxford UP

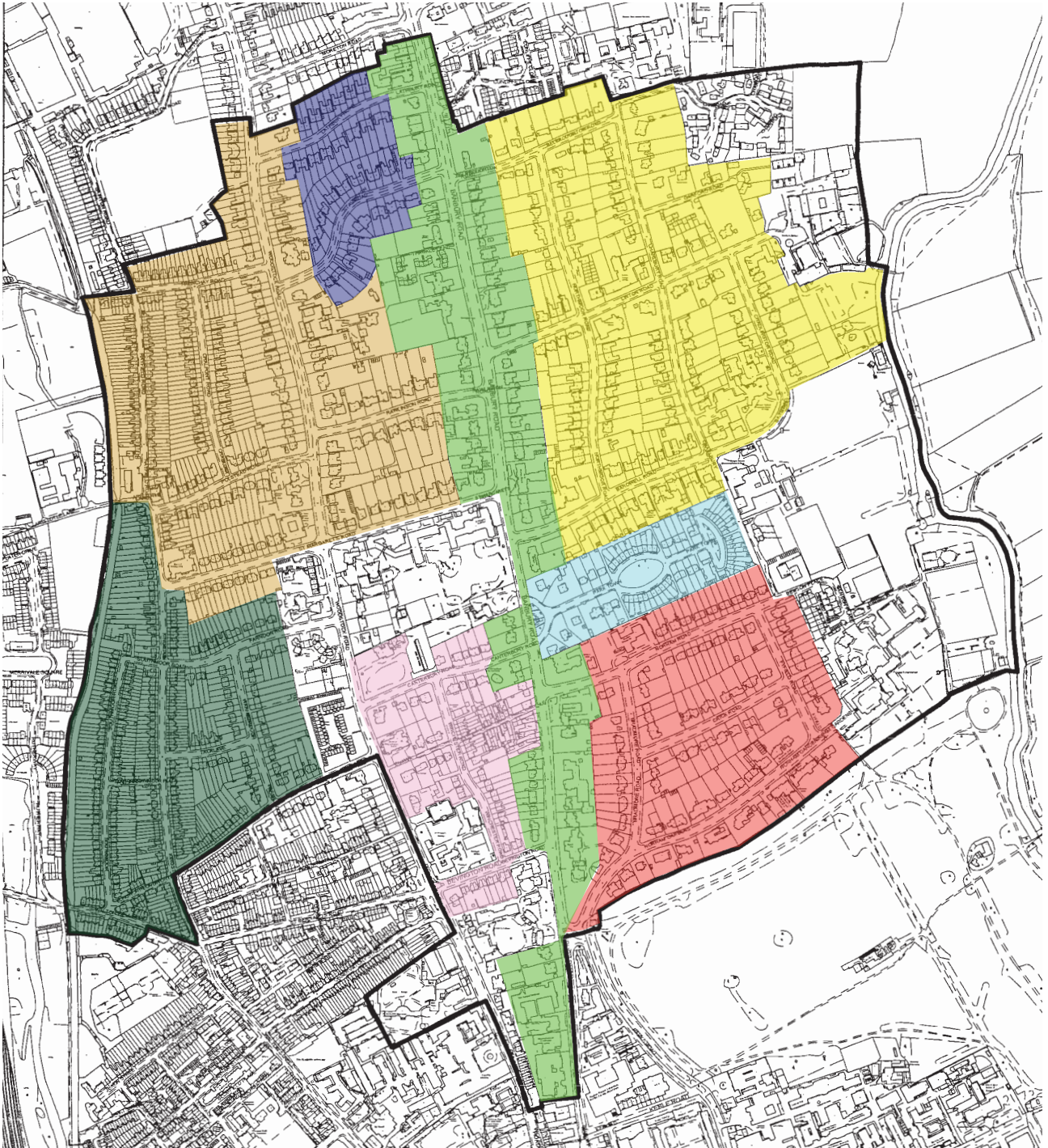
Sherwood, J and N Pevsner (1974) *Oxfordshire* (Buildings of England) Harmondsworth: Penguin

Tyack, G (1998) *Oxford: an architectural guide* Oxford: Oxford UP

Whiting, R C, ed. (1993) *Oxford: studies in the history of a university town since 1800* Manchester etc: Manchester UP

APPENDICES

APPENDIX A: MAP INDICATING CHARACTER AREAS



- | | | | |
|---|-----------------|---|----------------------------|
|  | Norham Manor |  | St Margaret's |
|  | Park Town |  | Banbury Road |
|  | Bardwell Estate |  | North Parade |
|  | Kingston Road |  | Lathbury & Staverton Roads |

APPENDIX B: LISTED BUILDINGS

All the buildings and structures described in this Appendix are listed Grade II, except the Church of St Philip and St James, the Radcliffe Observatory and the Observer's house now Osler House, which are all listed Grade I.

<i>Character Area/ Street</i>	<i>No</i>	<i>Notes</i>
-------------------------------	-----------	--------------

Norham Manor

Bradmore Road	13	1870, Architect: Frederick Codd
Norham Gardens	3	1866, Architect: Charles Buckeridge
Norham Gardens	5	1865, Architect: William Wilkinson
Norham Gardens	7	1862, Architect: William Wilkinson
Norham Gardens	9	1862-63, Architect: Charles Buckeridge
Norham Gardens	13	1869, Architect: William Wilkinson
Norham Gardens	19	1877, Architect: Frederick Codd
Parks Road		North Lodge, 1862, Architect: H W Moore

Park Town

North side	1-61 Odd	1853, Architect: Samuel Lipscombe Seckam
South side	2-46; 50-64	1853, Architect: Samuel Lipscombe Seckam
Letterbox		1865 Penfold type (west end The Crescent)

Bardwell Estate

Belbroughton Road	1	1925-26, Architect: Christopher Wright
Charlbury Road	2-4	1908-09, Architect: Stephen Salter
Linton Road	7	1910, Architect: Arthur Hamilton Moberly
Northmoor Road	2	1903, Architect: Edward W Allfrey
Northmoor Road	20	1924, Architect Fred E Openshaw, home of J R R Tolkein

<i>Character Area/ Street</i>	<i>No</i>	<i>Notes</i>
-------------------------------	-----------	--------------

Kingston Road

Letterbox		1865 Penfold type (junction Farndon and Warnborough Roads)
Kingston Road	114-138 consec	1870-73, Built by Clapton Rolfe
Kingston Road	149-164 consec	1870-73, Built by Clapton Rolfe
Kingston Road	159-164 consec	1870-73, Built by Clapton Rolfe
Walton Well Road	11-25 odd	1883, Built by Curtis Brothers
Drinking Fountain, Walton Well Road		1885, marking site of Walton Well
Road Bridge 242, Walton Well Road		c. 1790 Office of James Brindley

St Margaret's

Church of St Margaret		1883-93, Architect: H G W Drinkwater with porch by G F Bodley
War Memorial		Dedicated 1920
Vicarage		c. 1884, Architect: H G W Drinkwater
Road Bridge 240, Aristotle Lane		c. 1790 Office of James Brindley

Banbury Road

East side	52-54	Architects: Frederick Codd (1869, 52) and John Gibbs (1867, 54)
East side	56	1866, Architect: John Gibbs
East side	60	1864, Architect: William Wilkinson
East side	62	1864, Architect: E G Bruton
East side	66	1869, Architect: Frederick Codd
East side	68 & 70	1853, Architect: Samuel Lipscombe Seckham

<i>Character Area/ Street</i>	<i>No</i>	<i>Notes</i>
-------------------------------	-----------	--------------

Banbury Road (continued)

West side	7 & 9	c. 1855, Architect: Samuel Lipscombe Seckham
West side	11 & 13	c. 1855, Architect: Samuel Lipscombe Seckham
West side	15-19	c. 1855, Architect: Samuel Lipscombe Seckham
West side	21	1879, Architect: T G Jackson
West side	25	Rear of Acland House, 1896, Architect: T G Jackson
West side	27	1881, Architect: J J Stevenson
West side	29	1881, Architect: J J Stevenson
West side	59	1869, Architect: Frederick Codd
West side	Gee's	Nursery building, 1897, designer unknown
West side	77	c. 1840
West side	79	Early 19th century
West side	89	c. 1830
West side	105	1886,
West side	121	1903, Architect: H T Hare

North Parade

Winchester Road	16	c. 1840
Woodstock Road	14-36 even	Late 18th century
Woodstock Road	42 & 44	17th century, altered 18th century
Woodstock Road	68	The Vicarage, 1887, Architect: H W G Drinkwater
Church of St Philip and St James		Grade I, 1862, Architect: G E Street

University Buildings

Radcliffe Observatory		Grade I, 1772, Henry Keene, completed by James Wyatt
Osler House		Grade I, late 18th century, Henry Keene
Boundary wall		18th century

<i>Character Area/ Street</i>	<i>No</i>	<i>Notes</i>
-------------------------------	-----------	--------------

University Buildings (continued)

<i>Lady Margaret Hall</i>		
Chapel		1933, Architect: Sir G G Scott
Wordsworth Building		1896, Architect: Sir Reginald Blomfield
The Talboting		1909, Architect: Sir Reginald Blomfield
Wolfson Quad		1959-61, Architect: Raymond Erith
Toynbee Building		1915, Architect: Sir Reginald Blomfield
Lodge Building		1920, Architect: Sir Reginald Blomfield
Old Hall		c. 1879, Architects: Pike & Messenger or Willson Beasley
Denake Building		1933, Architect: Sir G G Scott
<i>St Anne's College</i>		
Hartland House		Begun 1937, Architect: Sir G G Scott
Wolfson & Rayne Buildings		1960-69, Architect: John Partridge (Howell, Killick, Partridge and Amis)
<i>St Antony's College</i>		
Main Block		1866-93, Architect: Charles Buckeridge
Chapel		1880, Architect: J L Pearson
Hilda Besse Building		1960, Architect: John Partridge (Howell, Killick, Partridge and Amis)
Boundary wall		Contemporary with Main Block
<i>St Hugh's College</i>		
Main Building		1914-16, Architects: H T Buckland & W Haywood
Lodge & Gates		1914-16, Architects: H T Buckland & W Haywood
Kenyon Building		1964-66, Architect: David Roberts
Woodstock Road	72	Formerly The Shrubbery, c. 1850
<i>Wolfson College</i>		
Original buildings only		1968-74, Architects: Powell & Moya

APPENDIX C: LOCALLY SIGNIFICANT BUILDINGS

This appendix is a record of a) significant non-listed buildings and b) buildings, both listed and unlisted, associated with significant people. Where buildings in the second category are designated on the National Heritage List for England, they are italicised in this appendix.

Character Area/ Street	No	Significance	Notes
<i>Norham Manor</i>			
Bradmore Road	2	Historical	Walter Pater (1838–1894), Author and scholar, and Clara Pater (1841–1910), pioneer of women’s education
Bradmore Road	14-16 (consec)	Architectural	Codd 1871
Bradmore Road	17	Historical	Mary Arnold Ward (Mrs Humphry Ward) (1851–1920), Social reformer, novelist
Norham Gardens	11	Architectural	Wilkinson 1867
<i>Park Town</i>			
<i>Park Town</i>	<i>10</i>	<i>Historical</i>	<i>Sarah Angelina Acland (1849–1930), Photographer</i>
<i>Park Town</i>	<i>42</i>	<i>Historical</i>	<i>William Richard Morfill (1834–1909), First Professor of Russian and Slavonic Languages</i>
<i>Bardwell Estate</i>			
Bardwell Road	Cherwell Boathouse	Architectural	1904, built by Tims, University Boatman
Belbroughton Road	3, 5 and 9	Architectural	Interwar houses by Wright and Fisher & Trubshaw (No. 9) – retain original features
Belbroughton Road	10	Historical	Sir Francis Simon (1893–1956), Low-tem- perature physicist and philanthropist
Chadlington Road	11	Architectural	Mountain 1908
Charlbury Road	22	Architectural	Harrison 1910
Charlbury Road	29	Architectural	Harrison 1914
<i>Northmoor Road</i>	<i>2</i>	<i>Historical</i>	<i>Charles Firth (1857-1936), Regius Profes- sor of Modern History</i>
Northmoor Road	18	Architectural	Rayson 1957
<i>Northmoor Road</i>	<i>20</i>	<i>Historical</i>	<i>John Ronald Reuel Tolkien (1892–1973), Author and scholar</i>
Northmoor Road	Church of St. Andrew	Architectural	Fenning 1907

Character Area/ Street	No	Significance	Notes
Kingston Road			
Kingston Road	22-27 (consec)	Architectural	1870s built by Horne
Kingston Road	35-40 (consec)	Architectural	1870s built by Holt
Kingston Road	106-111 (consec)	Architectural	1870s built by Wheeler
Leckford Road	47-53 (consec)	Architectural	1876 built by Walter
St Margaret's			
Polstead Road	No. 2	Historical	T E Lawrence (1888-1935), Author, archaeologist, officer and diplomat
Polstead Road	St. Margaret's Institute	Architectural	Probably Moore 1889-91
Rawlinson Road	12	Historical	Sir Richard Doll (1912–2005), Epidemiologist
Woodstock Road	78	Architectural	Pike & Messenger 1885
Woodstock Road	80	Architectural	Edis 1886
Woodstock Road	82	Architectural	H W Moore 1896
Woodstock Road	94	Historical	Dorothy Crowfoot Hodgkin, OM, FRS (1910–1994), Crystallographer, Nobel Laureate in Chemistry
Woodstock Road	121-23	Architectural	Seckham 1855
Banbury Road			
Banbury Road	65-67 (group)	Architectural	Early 19th-century
Banbury Road	69-75 (group)	Architectural	Early 19th-century
<i>Banbury Road</i>	56	<i>Historical</i>	<i>Professor Sir Edward Poulton, FRS (1856–1943), Evolutionary biologist, and Ronald Poulton (later Poulton Palmer) (1889–1915), rugby football hero</i>
Banbury Road	78	Historical	Sir James Murray (1837–1915), Lexicographer and Editor of the OED
Banbury Road	106	Historical	Paul Nash (1889–1946), Artist

Character Area/ Street	No	Significance	Notes
-----------------------------------	-----------	---------------------	--------------

<i>Lathbury & Staverton Roads</i>			
Lathbury Road	Nos. 1-3 (odd)	Architectural	Mountain 1905
Lathbury Road	20	Historical	Nirad C. Chaudhuri (1897–1999), Writer

This page is intentionally left blank

Appendix: Illustrations

All photographs by Artemis Heritage unless otherwise credited

Page No	Column	Caption
6		St Philip & St James viewed from Leckford Road; only the left side of the road is within the Conservation Area
7		Examples of typical entrances: left, 13 Bradmore Road; centre, 112 Southmoor Road; right, [TBC]
8		St Giles Terrace at the southern end of Woodstock Road
9	Right	Southern entrance into Park Town from Banbury Road
10	Left	1. River boundary on eastern edge of Conservation Area within grounds of Lady Margaret Hall 2. Canal boundary on western edge of Conservation Area
11	Right	Royal Oak Inn which was established in the 17 th century
12	Left	The Shrubbery in Woodstock Road, one of several large houses built after the enclosure of St Giles' Field
12	Right	121-123 Woodstock Road, the only houses built as part of Seckham's planned development for the area
13	Right	Small terraced houses in Hayfield Road opening straight onto the street, a unique feature in the Conservation Area
14	Left	1. Pre-First World War houses in southern stretch of Northmoor Road 2. 20 th -century Brutalist residential annexe for University College replacing a 19 th -century house in Woodstock Road
14	Right	Dramatic link building by Zaha Hadid for St Antony's College
15	Left	View northwards along Northmoor Road
15	Right	Rare occurrence of houses terminating a long view, here in Southmoor Road where it bends to join Kingston Road
16	Left	Stepped building line in Lathbury Road
16	Right	View into the Conservation Area from Powell and Moya's bridge over the Cherwell at Wolfson College
17	Left	Semi-detached houses in Chalfont Road
17	Right	Terraced housing at the junction of Farndon Road with Kingston Road
18	Left	Slightly curving south wing of Wolfson College
18	Right	Former Gee's nursery that served gardening needs
19	Right	Blomfield's Toynbee Building at Lady Margaret Hall
20	Left	1. GG Scott's Library at St Anne's 2. Buckland and Hayward's garden front at St Hugh's
20	Right	Pearson's chapel at St Antony's
21	Left	Academic wing at Wolfson College completed in 2016
21	Right	18 th -century wall enclosing the Observatory buildings, now part of Green Templeton College
22	Left	1. Brick wall and wooden gate in Frenchay Road 2. Low wall and railings in Southmoor Road

Page No	Column	Caption
22	Right	Feather edged fencing in Charlbury Road (Courtesy Phillip Allen)
23	Right	1. English bond brickwork 2. Tile hanging in Charlbury Road
24	Left	Roughcast render, and rare occurrence of coursed rubble, in Charlbury Road
25	Left	Radcliffe Camera, a distinguished 18 th -century building in a much altered setting that sits oddly within the Conservation Area
26	Left	13 Norham Gardens by Wilkinson
26	Right	Houses by Codd in Banbury Road
27	Left	Street's masterpiece of St Philip and St James
27	Right	Polychromatic brickwork on Clapton Rolfe's terrace, 159-164 Kingston Road
28	Left	Jackson's Queen Anne Revival building for the Girl's High School in Banbury Road
28	Right	Wright's distinctive interwar architecture in Belbroughton Road
29	Left	Lodge, entrance piers and gates at St Hugh's
30	Left	Canal Bridge 240, Aristotle Lane
31	Left	Cherwell Boat House
31	Right	106-111 Kingston Road
32	Left	St Margaret's Institute in Polstead Road
32	Right	1 Lathbury Road
34	Left	Detached houses in Bradmore Road
34	Right	13 Bradmore Road by Codd
35	Left	View along Norham Gardens towards the junction with Bradmore Road
36	Left	South terrace of Park Town
36	Right	Raised east terrace terminating Park Town
37	Left	South approach into the facing terraces
37	Right	Gated entrance into the residents' garden
38	Left	View along Charlbury Road
38	Right	Fisher and Trubshaw house in Belbroughton Road that retains original windows
40	Left	Pair of semi-detached houses in Kingston Road, adding interest to the streetscape between listed terraced housing
40	Right	Terraced housing in Kingston Road
41	Left	Grander row of terraced housing in Walton Well Road adjacent to the canal
41	Right	Multiple occupancy of smaller houses manifested by bicycles and rubbish bins
42	Left	1. St Margaret's Church 2. Rare occurrence of trees in the public domain in St Margaret's Road
43	Left	Trees in the public domain as well as noticeable loss of front gardens and boundary walls in Polstead Road

Page No	Column	Caption
43	Right	Pair of smaller semi-detached houses skilfully converted into a single dwelling but with noticeable loss of the front gardens
44	Left	Wychwood School created from two detached 19 th -century houses, linked unsympathetically although respecting the scale of the original buildings
44	Right	Institutionalisation in Banbury Road tends to degrade front gardens, while windows seem 'blind', and signage as well as corporate planting are out of place
45	Left	View southwards into the city, which is terminated by large institutional buildings, obliterating the essential link to the open space of St Giles'
46	Left	<ol style="list-style-type: none"> 1. North Parade contrasts significantly with the primarily residential streets in other parts of the Conservation Area 2. Winchester Road is one of the broad streets enclosing North Parade Avenue
47	Left	View of St Philip and St James from Winchester Road across back gardens, showing the potential for degradation of the view when large extensions are designed
47	Right	Gaps between buildings are important for enhancing the garden city ambience of the Conservation Area
48	Left	Parking, even for deliveries, is a problem in North Parade impacting on pedestrian use
49	Left	Staggered building line in Lathbury Road
49	Right	Moderately successful compromise between retention of front garden either side of original tiled path and need for off-road parking
50	Left	Curving street in Staverton Road [Check]
54		Map indicating character areas

This page is intentionally left blank

To: City Executive Board
Date: 9 February 2017
Report of: The Service Manager, Environmental Sustainability
Title of Report: Refresh of Carbon Management Plan: 2017/18 - 2021/22

Summary and recommendations	
Purpose of report:	The current five year phase of the Council's Carbon Management Plan (CMP) concludes at the end of March 2017. The purpose of this report is to approve the next five year phase of the CMP (2017-2022).
Key decision:	Yes
Executive Board Member:	Cllr John Tanner, A Clean, Green Oxford
Corporate Priority:	A Clean, Green Oxford.
Policy Framework:	Sustainability Strategy
Recommendations: That the City Executive Board resolves to:	
<ol style="list-style-type: none"> 1. Adopt the new Carbon Management Plan as detailed in Appendix 1; 2. Note that now straight-forward and accessible carbon reduction measures have been implemented through use of the Salix and Salix Plus funds, there will be the need to make financial bids for external support for larger capital projects, additional match funding requests or innovative approaches of using community funding models with shared financial advantages; 3. Endorse the phased development of an Energy Management system (ISO 50001) over the next 5 years across all key significant energy use areas at the Council (e.g. Offices, Depots, Leisure Centres, Fleet fuel consumption); 	

Appendices	
Appendix 1	Carbon Management Plan 3: Continual improvement in carbon and cost reduction – The Oxford City Council Carbon Management Plan 2017-2022
Appendix 2	Risk Register

Introduction and background

1. Oxford City Council has successfully rolled out phases of its Carbon Management Plan since 2008/09, implementing measures calculated to reduce CO₂ emissions by over 5000tCO₂ per year by 2015/16, reducing utility bills and playing its part in tackling climate change and offering leadership to other organisations. The first phase was called “Getting our House in Order”, the second phase “Carbon Reduction at the Heart of Everything we do”. The third phase “Continual improvement in carbon and cost reduction” is due to start in April 2017.
2. The carbon emissions reductions to date have been achieved through a range of measures such as LED lighting and controls upgrades, boiler upgrades, reduction of waste to landfill, fleet fuel reduction measures, estates rationalisation and building disposals, as well as significant deployment of renewable energy technologies. The Council is now producing over 750,000kWh of electricity per year (or the equivalent of 8% of its electricity demand) through Solar PV installations on the roof tops of its buildings.
3. Reducing CO₂ emissions leads to significant reductions in the associated energy, water and fuel spend. It is estimated that the Council is now spending approximately £500,000 less per year on these bills than it would have been spending at consumption levels prior to proactively targeting CO₂ emissions reductions across its estate and operations.
4. To compare performance now with that of the original baseline period (2005/06) given expansion of scope over time, we can broadly estimate that our carbon footprint would have been about 42% larger (14,070tCO₂) under a business as usual scenario.
5. Our actual emissions at end of 15/16 are expected to be c.9040tCO₂ – which equates to an absolute decrease of 25% over the period 2005/06 to 2016/17. This is presented simplistically in Figure 1.

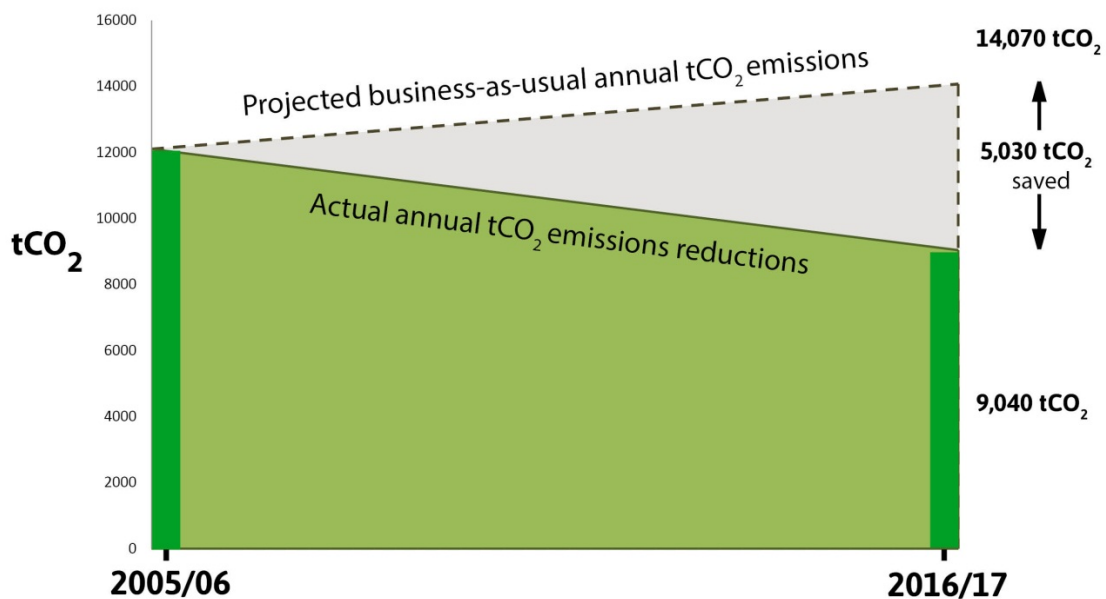


Figure 1: Emissions reductions compared to business-as –usual scenario

6. The 25% reduction in absolute emissions has been achieved against an upward pressure on carbon emissions from increased leisure centre user numbers (going up by approximately 7% over the last 3 years), increased recycling (extra vehicle movements) and commercial activity that has a direct impact on Council energy, fuel and water use.
7. A refreshed and updated plan covering the next 5 years (2017/18 to 2021/22) has been developed to ensure continual improvement in carbon and energy management, driving down energy, fuel and water spend and their associated carbon dioxide emissions. The aim is to deliver significant progress against the current corporate carbon target of minimum 5%/year reduction by implemented measures (See Appendix 1). If successful, it is estimated that this will yield a 2044 tCO₂/year reduction in CO₂ emissions through implemented measures and an estimated cash saving of over £100k per year when compared with business-as-usual operation. It is anticipated that extra investment will be needed to achieve these targets (see *Financial implications* section below).
8. Given that many relatively straight-forward carbon reduction measures have been installed in recent years through efficient use of revolving loan funds and estate rationalisation, continuing to meet the 5%/year target will be increasingly challenging. Significant progress will be delivered by the development of more formal procedures and awareness of energy management responsibilities of all staff that have direct control or influence over energy, fuel and water consumption. This can be facilitated through the development and roll out of council-wide Energy Management Systems such as those in ISO 50001.
9. The “Continual improvement..” theme underpinning the new CMP phase means seeking out all opportunities across the Council to reduce carbon emissions and energy, fuel and water spend; using the expertise of staff in their immediate work area to spot new opportunities making sure all new technological advances are

tracked and deployed when cost effective. Engagement across the Council is vital to identifying new opportunities.

10. Crucial to developing these opportunities and getting close to the target over the 5 year period is securing further funding for their implementation. Particular emphasis needs to be placed on the decarbonisation of heat and leisure centres. Typically these initiatives involve high capital cost plant, resulting in running cost and carbon reduction over the life of the plant. Funding will be sought from government and via internal budget bids during this phase of the plan. Bids for external funding support will be made as required for large scale capital projects to drive down carbon emissions. Given the more complex nature of larger scale projects, progress is likely to be challenging with longer lead in times to realise carbon reductions. Robust and detailed business plans for significant additional match funding requests will be required with all key staff expected to support their development. Innovative funding models will be also considered where appropriate using community share offer funding models such as those developed by the Low Carbon Hub.

Achievements to date

11. The Council has achieved acclaim for its successes and achievements to date in the area of carbon management over the years that it has been implementing its carbon management plans. This has led to a series of knock-on benefits attracting significant funds into the City and boosting activities in the City-wide approach to CO₂ emissions reduction. Since 2008 the Council has achieved the following:
 - Significantly increased the number of Solar PV installations across the City – now generating over 750,000kWh/year of clean energy – generating the equivalent of over 8% of the Council's electricity requirements through Solar PV by 2015/16
 - Signing up to the Covenant of Mayors to work with hundreds of other Cities around the world to reduce CO₂ emissions (http://www.covenantofmayors.eu/index_en.html)
 - Recognition for the Council's carbon management reporting approach of calculating CO₂ emissions through installed measures endorsed as best practice through an independent audit carried out by Price Waterhouse Coopers Ltd (2014/15). Invited to PWC's Building Public Trust Awards 2015 as a shortlisted organisation (competing against other public and private sector organisations) and cited in their guidance document.
 - Local Authority Partner of the Year: Community Energy Awards 2014 for its work in supporting city-wide deployment of community renewable energy schemes
 - Continued to win significant match funding to build on its internal revolving Salix fund, winning an additional £100k of match funding on top of the £205k originally secured in 2009 to implement low carbon technologies across the Council. The size of the revolving loan fund is now £605k. The Council has also developed its own innovative revolving loan fund (Salix Plus) that opens up options to fund longer payback energy efficiency projects such as renewable energy technologies as well as fleet fuel and water efficiency projects.

- Launched and developed the innovative Low Carbon Oxford initiative – bringing together key “pathfinder” organisations in the City to reduce the Carbon footprint of Oxford
- One of 9 leading Local Authority (LA) areas in the UK invited to take part in the Department of Energy and Climate Change (DECC) sponsored Low Carbon Frameworks project (leading to winning nearly £360k of additional funding which has helped kick-start Oxford low carbon communities projects and Low Carbon Oxford initiative)
- “*Highly Commended*” in the Low Carbon Council category of the Local Government Chronicle awards 2011/12)
- the first local authority to achieve the Energy Reduction Verification British Standards Kitemark in 2011

12. In order to measure progress in CO₂ emissions reductions against competing drivers like commercial activity levels, numbers of visitors to its leisure centres, and other driving factors that create upward pressure on CO₂ emissions, the Council will continue to monitor and report progress with its carbon management plan through the implementation of measures calculated to reduce CO₂ emissions by 5% each year. The Council will also continue to monitor and report absolute tCO₂ emissions (and “tCO₂ equivalent” covering a wider range of Greenhouse Gas emissions) to Government each year.

13. The revised Carbon Management Plan (“*Continual improvement in carbon and cost reduction*”) included in Appendix 1 outlines our programme of activity for carbon management over the next 5 years building on the strong platform of achievement to date. It sets out the strategic context and the ‘case for action’, our revised carbon emissions scope and baseline, proposed projects and areas of activity and actions to reduce our emissions, as well as the governance arrangements (and escalation routes) to keep the programme on track.

Scope of emissions covered in the new plan

14. The scope of the updated carbon management plan will cover all sites that are the Council’s energy, water and fuel billing responsibility, significant emissions sources within the Council’s operations and where we can use funds to implement energy, water and fuel efficiency measures.

15. The revised baseline year emissions for 2016/17 are approximately 9037tCO₂. This means that the first year 5% target will require the Council to put measures in place to reduce CO₂ emissions by 452tCO₂ or more during 2017/18. Over the five years to 2021/22 this will mean implementing carbon reduction measures in excess of 2044tCO₂.

Meeting the 5% year on year target

16. The following measures and approaches will be applied towards meeting the target to 2021/22 (this list is not exhaustive but covers key areas of focus):

- Salix and Salix-Plus funded energy efficiency measures in buildings
- Active energy management – monitoring and targeting
- Implementation of ISO 50001: Energy Management systems in its significant energy, fuel and water use areas
- Further estate rationalisation;
- Member, Contractor and Staff energy awareness activities;
- Waste reduction activities;
- Fleet energy reduction measures;
- Renewable energy and low carbon technology installations – such as solar PV and heat pumps;
- Decarbonising heat and leisure centres.

Options appraisal

17. A Clean, Green Oxford is one of the Council's key overarching corporate priorities outlined in the Corporate Plan (2016-2020) recognising that "environmental sustainability is key for the planet, the nation and the city". The Council's vision is for a city that is "energy efficient, rich in biodiversity and has a growing resource of fossil-free energy and a demonstrably lower environmental footprint".
18. Continual improvement in carbon reduction and energy management within the City council's own estate and operations will play a key role in meeting this critical corporate priority and reaching world class performance in energy and carbon management. The council can then demonstrate leadership to other organisations.
19. It is therefore considered that there are no viable alternatives to the proposed option outlined in this report and to achieve the targets set.

Environmental Sustainability implications

20. The Carbon Management Plan outlines how the Council will achieve its annual CO₂ reduction target, one of the Council's key corporate priorities under 'A Clean Green Oxford'. It will provide a framework for the Council to deliver progress against the 5%/year carbon reduction target and contribute towards minimizing the Council's environmental footprint.

Consultation and communications

21. Raising awareness of energy, fuel and water efficiency improvements that the organisation is seeking can lead to all staff being able to make a valuable contribution to year on year CO₂ emissions reduction - tapping their knowledge and expertise in their immediate work area.
22. The ISO 50001 Energy Management Systems standard places a strong emphasis on staff and senior management engagement. The standard encourages the development of energy management teams focused on specific energy uses so that a targeted approach, development of specific energy performance indicators and continual improvements can be achieved.

23. Regular review meetings with energy management teams and communications to all staff on progress towards meeting targets will all assist with fostering wider engagement in delivering the overall aims of the carbon management plan.
24. Stakeholder communications will be carried out to get key messages across more consistently and also to seek ideas and input to shape the development of the Plan and Energy Management System. Key stakeholder workshops will also be held to raise awareness of the carbon management plan and energy management systems approaches and to assist with continual improvement in carbon reduction and energy management.

Financial implications

25. The main mechanisms currently in place for funding low carbon technology fixes across the estate in the period to the end of 2021/22 will be the continued use of the Salix £605k revolving loan fund (yielding approximately £100k to £160k available to spend per year) and the ca£200k available from the Salix-Plus fund from 2016/17 (as well as the annual loan repayments from other projects back into this fund – approx. £50k/year).
26. Salix is currently only able to be used in buildings and other sites within the estate – where paybacks must, in general, be 5 years. The Salix-Plus fund is an additional internal source of funding to be used in a similar way to Salix – however it provides opportunities for use of funds where Salix is currently not possible e.g. if the paybacks are beyond five years or for use on non-building related energy savings. This could include improvements in fleet technologies or reduction in waste sent to landfill that will lead to reduced carbon emissions.
27. Though revolving loans funds have been used successfully to fund carbon reduction measures over the last few years - and this will continue - it is anticipated that the existing resource will not fully fund the implementation of measures to meet the 5% minimum carbon reduction target over the 5 year period of the new plan.
28. Additional grant funding bids (with business plans) will be made internally via budget bids, and to government or other available providers as opportunities arise to facilitate continued deployment of renewable energy technologies and build energy efficiency capacity across the Council and wider city area.

Legal issues

29. Whilst there is currently no legal requirement to adopt a carbon management plan, continuing progress in the area of energy and carbon reduction is key to meeting international and national legislative requirements e.g. Climate Change Act 2008, Housing and Planning Act 2016, Heat Networks (Metering and Billing) 2014, UK requirements under the Energy Performance of Buildings Directive (Energy Performance Certificates, Display Energy Certificates), and Government Greenhouse Gas Reporting requirements. The energy and carbon markets are continually changing and developing, having a robust energy and carbon management plan, and associated management systems, in place will develop ongoing Council resilience and preparedness to legislative changes in the sector as they develop. It will also help the Council realise future opportunities that arise out of changes in legislation in this area.

Level of risk

30. The risks to the Council are failure to deliver the carbon management plan and miss opportunities for continual reduction in energy, fuel and water spend and reduce the overall carbon footprint of the organisation. Other risks highlighted relate to failure to meet the corporate target should, for example, resources available diminish or funding not be won during the course of the implementation phase leading to reputational damage.
31. A risk register is attached (see Appendix 2), outlining the potential risks including a risk to the future of the Salix fund if it is not possible to implement projects at the required rate of spend by the Salix administration. (Potentially having to return the £300k match fund won since 2008 that has assisted us in meeting our CO₂ reduction targets to date.)

Equalities impact

32. Energy management and reducing the Council's carbon emissions is the responsibility of all Members, staff and contractors at the Council. In terms of an Equalities Impact Assessment, there are no adverse impacts on any part of the community; however Oxford City Council is mindful of the important leadership role it plays across its communities. Energy costs have a disproportionate effect on those on the lowest incomes so it is vital that the Council communicates clearly the reasons for managing energy and reducing carbon emissions.
33. The aims and progress of the Council's carbon management activities are communicated regularly to staff, citizens, community groups and businesses through various media such as the intranet, Internet (Twitter and Facebook), Your Oxford, regular press releases and through the Council's lead role in the Low Carbon Oxford and related initiatives (e.g. the Low Carbon Hub and the Sustainable Energy Action Plan). Best practice and information on low carbon approaches from the Council's experience in delivering its carbon management plan are shared regularly with a range of stakeholders through these approaches.

Staff implications

34. Continuing to meet year on year carbon reduction targets, and continual improvement in energy, fuel and water management, will become increasingly challenging as the time goes on. They will also need to be achieved against a trend of increased commercial activity and revenue generation and numbers of people visiting our leisure centres, all of which provide upward pressure on carbon emissions and associated spend.
35. Current resources within the core delivery team (Energy and Natural Resources team in Environmental Sustainability) will not be able to achieve these targets alone. Full Council-wide engagement with those key individuals and teams that have control and influence over energy, fuel and water consumption will be crucial to delivering progress against the challenging 5%/year target.
36. Developing energy management systems processes aligned with the international energy management standard (ISO 50001) will assist with driving wider input and engagement in identifying and reducing unnecessary energy, fuel and water consumption and spend and meeting the challenging year on year targets.

Report author	Paul Spencer
Job title	Energy & Carbon Manager
Service area or department	Environmental Sustainability
Telephone	01865 252238
e-mail	pspencer@oxford.gov.uk

Background Papers: None

This page is intentionally left blank

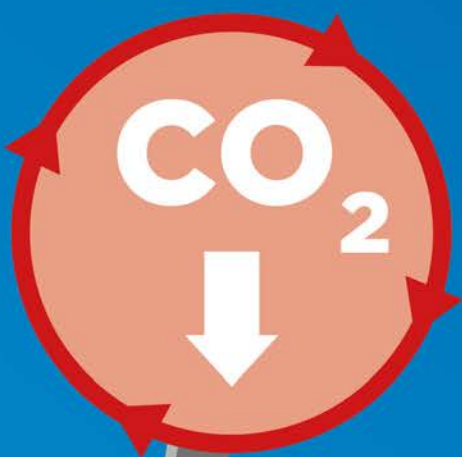
Carbon Management Plan 3

www.oxford.gov.uk



2017-22

Continual improvement in carbon and cost reduction



DRAFT V1.7

February 2017



0. Executive Summary

Oxford City Council has successfully implemented Carbon Management Plans since 2008/09, implementing measures calculated to reduce CO₂ emissions by over 5000tCO₂ per year by 2015/16.

Reducing CO₂ emissions leads to reductions in the associated energy, water and fuel spend. It is estimated that the Council is spending approximately £500,000 less per year than it would have been spending if it had not been proactively targeting CO₂ emissions reductions across its estate and operations.

A refreshed and updated plan covering the next 5 years (2017/18 to 2021/22) is described in this document, outlining where continual improvement in carbon and energy management can drive down electricity gas, fuel and water spend and their associated carbon dioxide emissions. This will deliver progress towards the council's target of 5%/year minimum carbon reduction by implemented measures.

To date the Council's carbon targets have been achieved mainly through smart use of energy efficiency investment pots operating as revolving loan funds, and estate rationalisation. However, in the next 5 year phase, progress will be increasingly challenging, requiring a gearing up of energy, fuel and water management activity.

Crucial to achieving these aims will be the development of more formal procedures and awareness of energy management responsibilities of all staff that have control or influence over energy, fuel and water consumption. This can be significantly facilitated through the development and roll out of a council-wide Energy management system approach: ISO50001.

Building on best practice in carbon and energy management, the Plan for the next 5 years outlines an approach to foster further engagement of all staff through a phased programme of implementing the International Energy Management System (ISO 50001) in key buildings and operations.

Benefits of implementing ISO 50001 include:

- further embedding of energy and carbon reduction into core operations and responsibilities;
- strong top-down commitment to energy management;
- building resilience and commercial agility
- providing the framework for continual improvement in energy management

The Plan continues with the 5%/year minimum carbon reduction target through installed measures and that will be tackled via a range of measures and approaches over the 5 years to 2021/22.

A combination of Salix funding, further optimisation of use of the Council's buildings, and development of wider staff engagement in identifying and tackling excess or unnecessary energy, water and fuel consumption will be used. Further development of on-site energy generation through renewable energy technologies will also be continued where possible.

This needs to be achieved against a trend of increased commercial activity and revenue generation and numbers of people visiting our leisure centres, all of which provide upward pressure on carbon emissions.

Current resources within the core delivery team (Energy and Natural Resources team) will not be able to achieve these targets alone and full engagement will be crucial to delivering progress against the challenging 5%/year target.

Impact of the council's control and influence on local carbon emissions is wider than just those associated with its estate and operations and will play their part in contributing to the 5%/year target.

DRAFT

1. Introduction

Rising energy prices, budget constraints, and diminishing conventional energy resources mean it is imperative that we improve energy efficiency and reduce our reliance on fossil-derived energy across Oxford City Council. There is also established global consensus and supporting evidence that we need to act now to reduce the impact we are having on the rate of global warming through the burning of fossil fuels.

As local authority funding changes and demand for services increase, continual improvement in energy and carbon management will contribute towards controlling and reducing energy, fuel and water consumption, and spend, contributing to development of the Council's financial resilience, and protection of front-line services.

Towards this end the Council has proactively reduced CO₂ emissions and associated energy and water consumption from its own estate and operations through implementation of carbon management programmes over the past 8 years. It has also fostered development of city-wide approaches to the same aims through establishing the Low Carbon Oxford and other leading initiatives to reduce city-wide CO₂ emissions and reliance on fossil fuels.

Oxford City Council launched its first Carbon Management Strategy and Implementation Plan ("Getting Our House in Order") in 2008/09, mapping out a route to implementing a range of measures to achieve a reduction in CO₂ emissions by 25% by 2011 (on a 2005 baseline) and 3% year on year thereafter. The Plan was refreshed and updated in August 2012 (Carbon Reduction at the Heart of Everything we Do) with a stretched target of a 5% year on year implementation of CO₂ reduction measures, and an expanded scope (including supplies of electricity and gas in communal areas of council housing stock) bringing in more emissions sources that are under the Council's control.

Having met the target for the first plan, and expecting to meet the target set out in the second plan, a refreshed and updated plan covering the next 5 years (2017/18 to 2021/22) is outlined in this document. It maps a path to continual improvement in carbon and energy management, driving down energy, fuel and water spend and their associated carbon dioxide emissions.

The areas that contribute to the bulk of the Council's CO₂ emissions from the council estate and operations are:

- Heating and electricity consumption in Council operational sites (e.g. office buildings, depots, leisure centres, car parks, sports pavilions, public conveniences and other miscellaneous sites)
- Fuels consumed in Council fleet vehicles (e.g. refuse trucks, vans and pool cars), non-road going vehicles and plant (e.g. lawnmowers, chippers, and portable heaters)
- Travel for business purposes (e.g. fuel consumed in staff-owned vehicles, pool cars and from the use of public transport to conduct Council business)

- Operational waste deposited in landfill sites (generated from Council operations)

This new Carbon Management Plan (“**Continual improvement in carbon and cost reduction**”) outlines our programme of activity for carbon management over the next 5 years building on the strong platform of achievement to date. It sets out the strategic context and the ‘case for action’, our carbon emissions scope and baseline, proposed projects and areas of activity and actions to reduce our emissions, as well as the governance arrangements (and escalation routes) to keep the programme on track.

Building on best practice in carbon and energy management, the Plan also aims to ensure Council buildings and major emissions sources (significant energy uses) meet the international energy management systems standard (ISO 50001) – see Section 7 and Appendix A for more details. A phased programme of rolling out the standard across key buildings and operations over the next 5 years is outlined. Benefits of ISO 50001 include:

- further embedding of energy and carbon reduction into core operations and responsibilities;
- strong top-down commitment to energy management;
- building resilience and commercial agility
- providing the framework for continual improvement in energy management

The Vision for carbon management 2017 to 2022:

Oxford City Council will instigate

“Continual improvement in carbon and cost reduction” and reduce carbon emissions in its estate and operations as efficiently and cost effectively as possible.

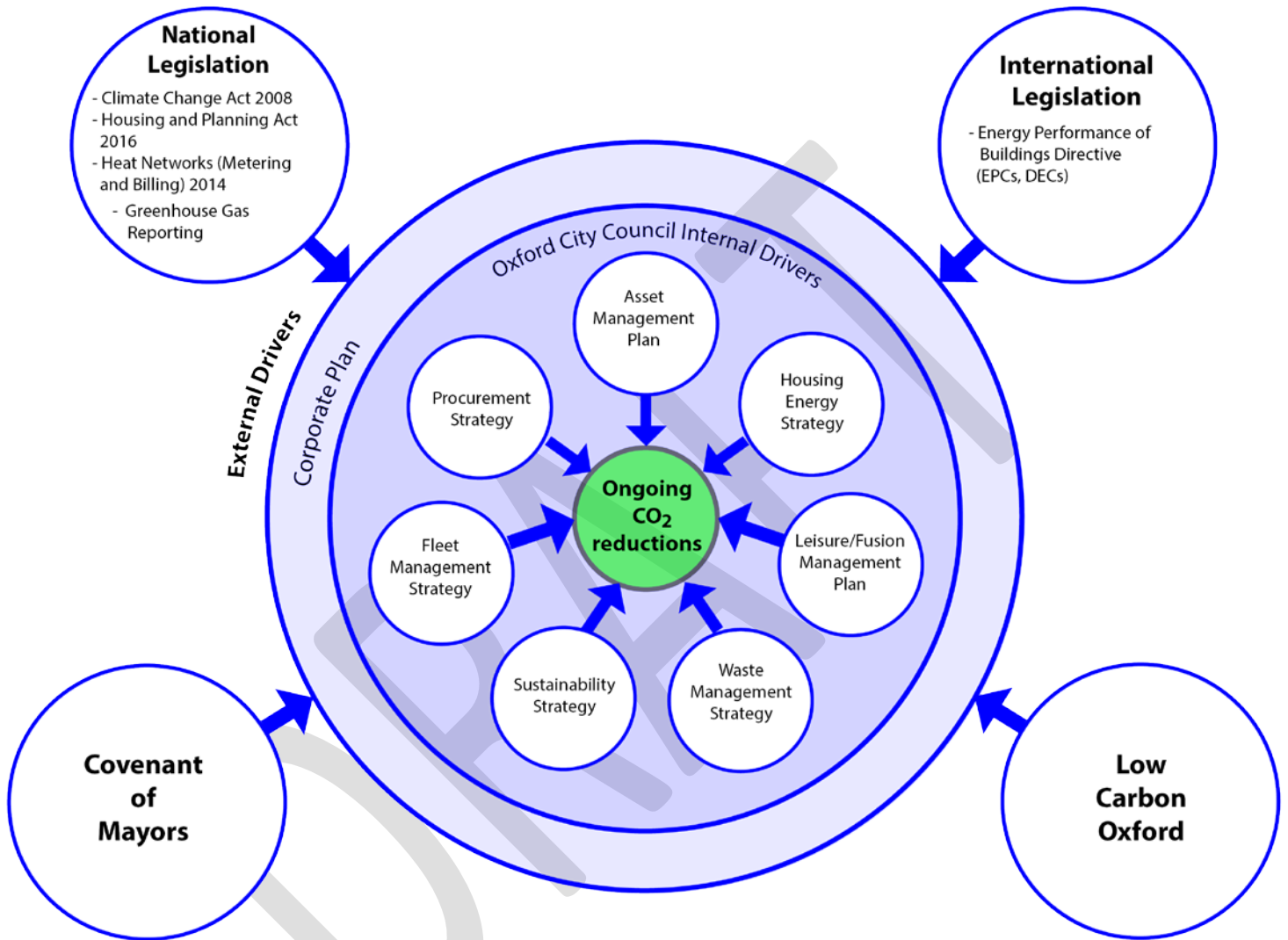
We will use our direct control and influence as a Council to enable and quantify local carbon emissions reductions.

By embedding our carbon management programme across the Council’s operations we will prove ourselves capable of meeting the carbon challenge head on.

By doing so we will ensure our continued leadership and influence of local businesses, communities and residents to deliver a city that is more energy and water efficient and progress towards carbon neutrality for Oxford.

2. Drivers and Links to key programmes at the Council (external and internal)

The carbon management plan and reducing Council-wide CO₂ emissions year on year are driven and directly affected by a number of external and internal drivers depicted below and described in more detail in Appendix B.



3. Case for action and risks

Increasing budgetary pressures and rising energy costs continue to make the economic case for energy and carbon reduction action ever stronger with the added benefits of delivering improved operational efficiencies within the Council and value for money.

Building carbon reduction capacity, and by implication energy, fuel and water consumption reduction, has the direct effect of reducing energy, fuel and water spend which is crucial in providing effective resource management and mitigating risk against future expected energy price rises.

Oxford City Council's avoided annual energy related costs for its core buildings are calculated to be over £500,000 per year in 2015/2016 relative to 07/08 before the

Council began implementation of a carbon management programme i.e. if the Council was consuming energy at the same levels as it was in 2007/08 in its core buildings, the energy related spend would be over £500,000 higher than it is today.

Continual improvement in carbon (energy, fuel and water) management will assist with maintaining lower spend than would be the case without activity in this area and continue to make year on year reductions in carbon emissions.

Providing wider leadership in the emerging area of carbon reduction can assist in inspiring others to do the same and develop confidence in individuals and organisations to take action, supporting the overall aims of the Low Carbon Oxford initiative to reduce CO₂ emissions in Oxford City.

4. CO₂ emissions boundary and scope

The emissions boundary is focussed on areas that demonstrate significant carbon emissions and energy uses and where sufficient data is available; are in the direct influence/control of the City Council and could realise financial benefits as a direct result of carbon reduction and energy management initiatives.

The following sources of emissions (and significant energy uses) will be addressed:

- All Council (operational) buildings (existing and new) – including swimming pools, sports facilities, car parks, pavilions, and public conveniences.
- Vehicles/Fleet
- Staff travel/Travel at Work (i.e. business travel/staff owned cars used to conduct council business [grey fleet])
- Waste disposal to landfill (Council generated) – *(subject to adequate data availability)*
- Communal areas of Oxford City Council Housing stock that are the billing responsibility of the Council (including Temporary Accommodations sites)
- Other miscellaneous buildings/sites that now are the billing responsibility of the Council (e.g. new sites, misc. smaller sites not previously included in previous baseline)
- Water consumption (and related carbon emissions)

The scope for implementing carbon reduction measures in the new 5 year plan will be extended to cover areas of council control and influence outside of our estate and operations. These carbon reductions will contribute to the delivery of quantified progress against our 5%/year carbon target.

Table 1 gives a breakdown of the main sources of CO₂ emissions (and significant energy uses) at Oxford City Council during 2015/16. Figures 1 to 4 show the information graphically. *Table 1 is arranged by largest to smallest emissions sources.*

Table 1: Main sources of CO₂ emissions (and significant energy uses) ranked by size at Oxford City Council (2015/16)

Emissions source	tonnes CO ₂	Cost (£s) (ex-VAT)	tCO ₂ (%)	Cost £ (%)
Leisure Centres	3,051	£584,262	32%	24%
Fleet fuel consumption	1,970	£676,000	21%	27%
Main Offices & Depots	1,111	£236,129	12%	10%
Sheltered Housing	750	£132,300	8%	5%
HRA Housing Landlords	592	£137,624	6%	6%
Temporary Accommodation	561	£110,209	6%	4%
Community Centres	307	£55,103	3%	2%
Waste to landfill (Operational)	289	£300	3%	0%
Car Parks	247	£54,978	3%	2%
Public Toilets & Streetscene	187	£42,469	2%	2%
Water*	150	£318,037	2%	13%
Corporate Property (Misc. smaller buildings)	117	£24,712	1%	1%
Sports Pavilions & Pitches	102	£26,030	1%	1%
Business travel	43	£78,402	0%	3%
Parks & Cemeteries	33	£7,615	0%	0%
Air Quality mon.	3	£744	0%	0%
Totals	9,513	£2,484,914	100%	100%

*tCO₂e figure used as this is the only available CO₂ conversion factor for water

Oxford City Council CO₂ footprint 2015/16

Figures 1 to 4 provide a breakdown of Oxford City Council's CO₂ emissions, significant energy uses and indicative costs:

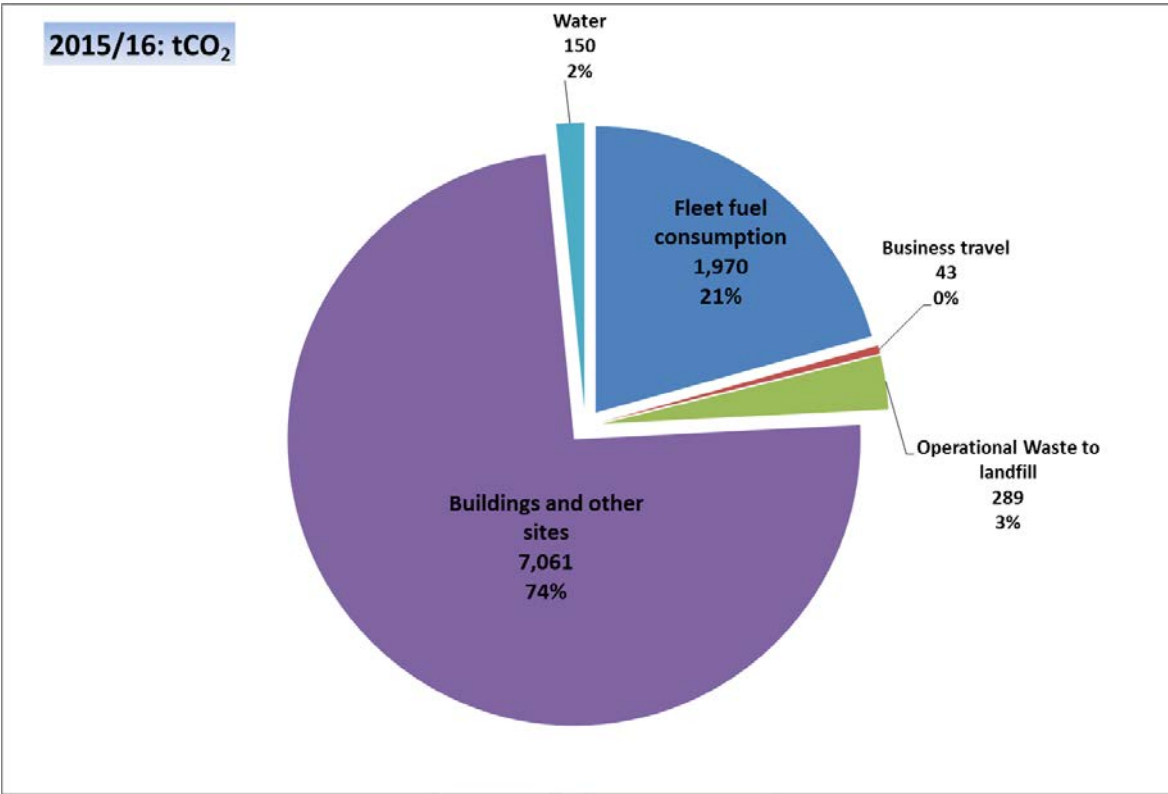


Figure 1: Breakdown of tonnes of CO₂ emissions per main category and percentage contribution (2015/16)

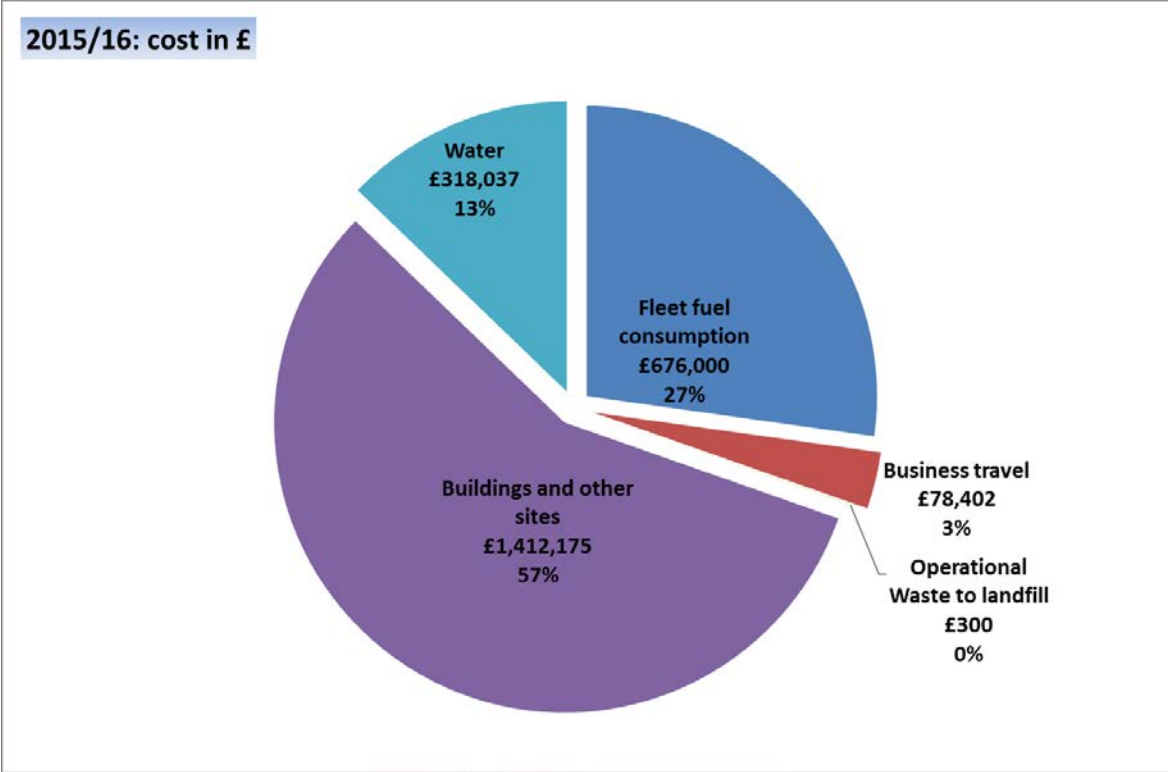


Figure 2: Breakdown of Energy (and water) cost per main category and percentage contribution (2015/16)

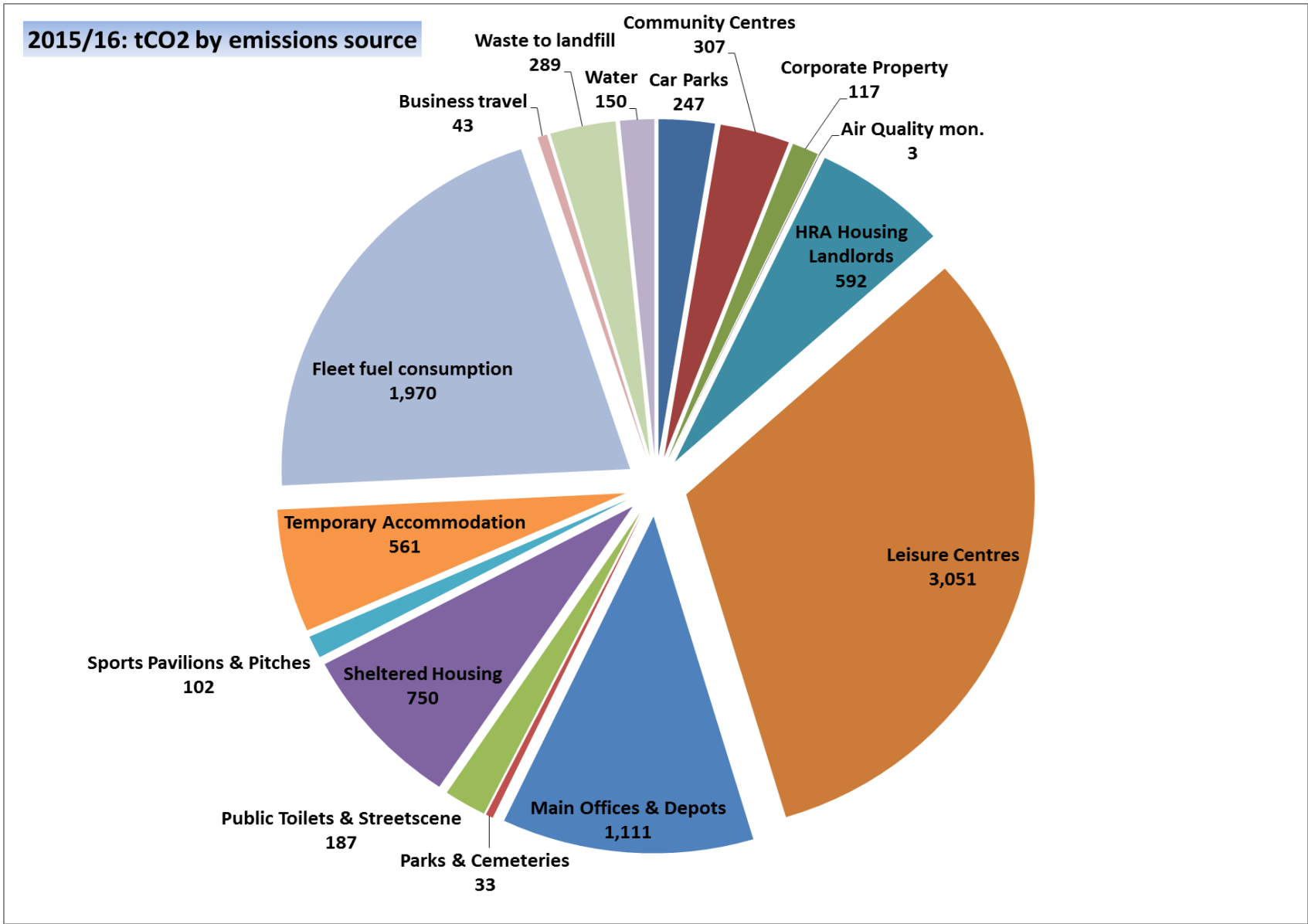


Figure 3: Breakdown of tonnes of CO₂ emissions sources by category (further detail) 2015/16

2015/16: Cost in £

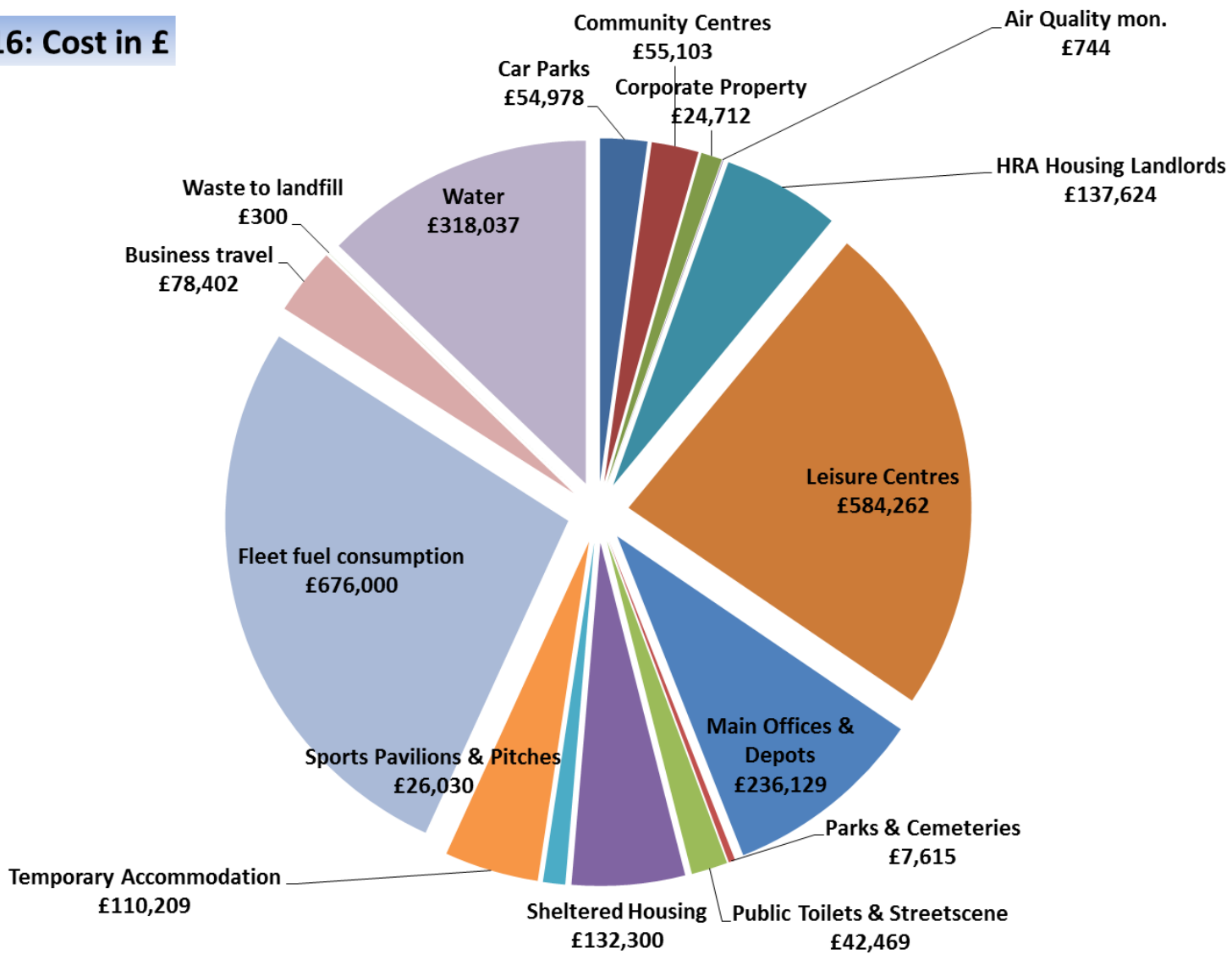


Figure 4: Breakdown of annual energy/water/fuel costs (£) per year by category for 2015/16. (Waste to Landfill refers to Council operational waste only, not municipal waste)

Aspiration to include in scope for future Plans

Procurement and CO₂: Estimates based on the assessment made by other local authorities suggest that procurement of goods and services can result in carbon emissions that can be as much as twice those arising from an authority's estate and operations, though it is not necessarily straight forward to focus in on carbon reduction opportunities.

The Council aspires to assess the carbon impact of its procurement decisions and seek ways to reduce CO₂ levels associated with this key area. This can be achieved through consideration of the embedded energy, fuel and water costs of the products and services it procures including major refurbishment and construction projects. The Council will develop pilot projects with the procurement team to establish the carbon and cost savings case through procurement of goods and services and develop greater understanding of the opportunities in this area of scope.

Staff commuting: Staff commuting is another area that the council will seek to influence in order to encourage shift to a lower carbon option for getting to work. Incentive schemes such as zero interest travel pass loans and the salary sacrifice scheme enable staff to purchase bicycles to commute to work. Home working also helps. Data for this area is difficult to access however, and staff travel surveys will help develop a better understanding of current commuting patterns and modes of transport.

The Council will aim to establish a relevant council team for implementing a travel plan and how this will be governed to ensure the full benefits can be realised in this area of scope.

5. Performance to date

The Council has continued to meet its 5% year on year target for implementing measures to reduce carbon emissions. At the time of writing the Council is on track to meet the ca 2396tCO₂ reduction target by the end of 2015/16 for implemented measures, outlined in the previous Plan. Most carbon reduction in Oxford City Council has come from a range of technical fixes and approaches such as:

- LED Lighting and controls upgrades;
- Boiler replacement and controls;
- Reductions in council generated waste sent to landfill;
- Significant deployment of renewable energy technologies over the past 4 years - now meeting over 8% of the Council's electricity requirements through Solar PV on-site generation, and
- Building disposals/office rationalisation (this represented approximately a 16% contribution towards total CO₂ emissions reductions figures during the Carbon Management Plan period to end 15/16)

Technical fixes have largely been funded using the Salix Energy efficiency revolving loan fund with renewable energy installations supported with the council operated Salix Plus revolving loan fund (See Section 8 and Appendix E for more information on Salix and Salix Plus funding).

To compare performance now with that of the original baseline period (2005/06) given expansion of scope over time, we can broadly estimate that our carbon footprint would have been about 42% larger (14,070tCO₂) than under a business as usual scenario.

Our actual emissions at end of 2015/16 are expected to be ca.9040t CO₂ – which equates to an absolute decrease of 25% over the period 2005/06 to 2016/17. This is presented simplistically in Figure 5.

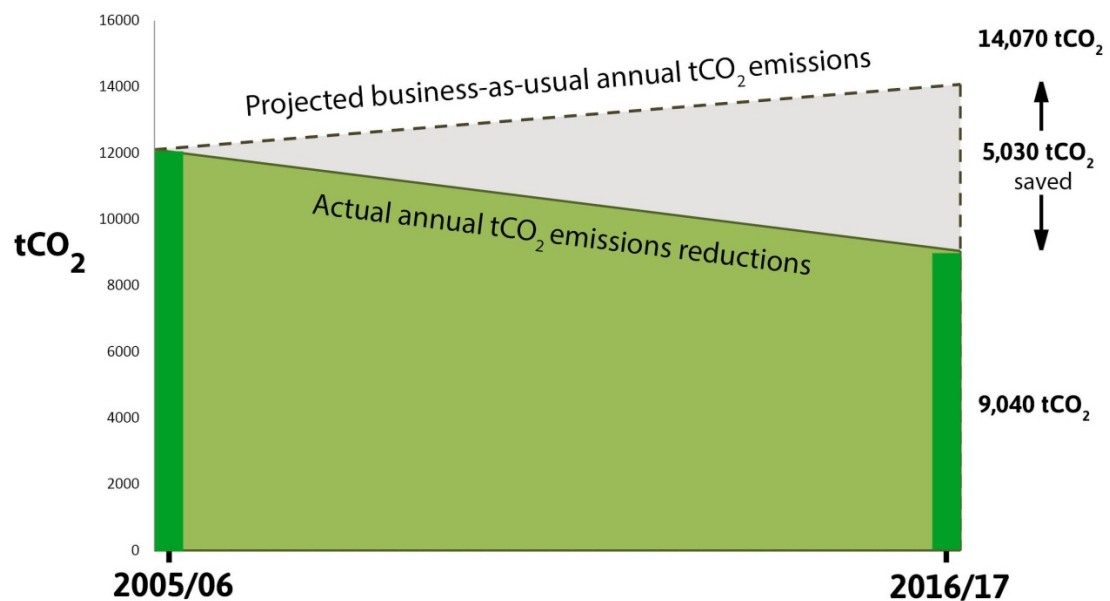


Figure 5: Emissions reductions compared to business-as-usual scenario

The 25% reduction in absolute emissions has been achieved against an upward pressure on carbon emissions from increased leisure centre user numbers (going up by approximately 7% over the last 3 years), increased recycling (extra vehicle movements) and commercial activity that has a direct impact on Council energy, fuel and water use.

6. CO₂ reduction targets for period 2017/18-2021/22

The Council wants to continue to demonstrate leadership in carbon reduction across Oxford by maintaining an average 5% minimum reduction year on year, by implementing measures where it has control and influence.

Based on the best available data for the baseline year (2016/17), Table 2 (below) shows the way the target builds over the period to 2021/22. It can be seen that this results in an overall target for the period to end

2012/22 of implementing measures to reduce carbon emissions by **2044tCO₂** (ca 23% reduction over the period).

The following table shows the projected annual emissions in tCO₂ per year and a breakdown of annual reductions in CO₂ emissions to meet the 5% minimum year on year reduction target over the 5 year period:

Table 2: Breakdown of year on year projected carbon reduction targets: Oxford City Council Carbon Management Plan 2017/18 to 2021/22

Baseline year 2016/17*	9037tCO ₂ /yr**	Average to achieve 5% min. target/yr, tCO ₂ /yr	Cumulative reduction (min.), tCO ₂ /yr
2017/18	8585	452	452
2018/19	8156	429	881
2019/20	7748	408	1289
2020/21	7361	387	1676
2021/22	6993	368	2044

* based on 5% less than 2015/16 total (9,513tCO₂) as a projection of 2016/17 total

** 9037tCO₂ is the baseline figure for 2016/17– subsequent years show projected total annual emissions

This is an ambitious target that it is anticipated will not be possible to be delivered with existing resources available to the Energy & Natural Resources team, in Environmental Sustainability. It is recognised that to get near to this target each year there will need to be full and sustained corporate engagement, building upon the earlier experience and picking up wider staff engagement and support across the council.

The additional individual initiatives necessary to achieve the carbon targets are outlined in the following section.

How we will deliver progress against the carbon reduction target

Progress will be increasingly challenging requiring a gearing up of energy management activity and investment.

Crucial to achieving these aims will be the development of procedures and awareness of energy management responsibilities of all staff that have direct control or influence over energy, water and fuel consumption. This can be significantly facilitated through the development and roll out of a council-wide energy management system approach: ISO 50001. This is described in section 7 and in more detail in Appendix A.

Progress towards our 5% minimum reduction target by implemented measures will be made via a range of measures and approaches over the 5 years to 2021/22 as outlined in Table 3 below.

Table 3: Summary of the range of areas that will contribute to the Council meeting its min. 5%/year CO₂ reduction target by implemented measures.

Carbon Reduction measure	Description	est tCO ₂
Salix funded projects -revolving loan fund provides c.£100- £160k/y	Government match fund used to fund installation of energy efficiency upgrades. E.g. LED lighting upgrades, implementation and upgrade of building energy management systems, variable speed drives, more energy efficient boilers, and insulation measures.	450
Salix Plus funded projects revolving loan fund provides c.£50-65k/y	Use of Salix-Plus fund for projects with paybacks beyond 5 years and for use on non-building related carbon reduction saving projects (e.g. Fleet fuel reduction measures, water efficiency and renewable energy installations - including innovative approaches such as installation of Solar car ports feeding Council owned or third party sites (supermarkets/retail parks) with large onsite demand, Anaerobic digestion using city wide food waste, Vertical axis wind turbines).	150
Decarbonisation of heat and leisure centres - unfunded work.	Heat supply in our operational buildings and particularly leisure centres is delivered by burning of fossil fuels (biomass boiler at Leys Pool is the only exception). We need to assess options with heat pump and other appropriate technology (generally low carbon heat plant is high capital cost, low running costs). £50k feasibility bid made for 16/17.	450
Active energy management – monitoring and targeting	Dynamic energy management approaches using smart meter data to assess expected versus actual consumption at City Council sites. Continual assessment and communication of building energy consumption data and escalation of consumption anomaly issues as they are identified.	100
Estate rationalisation	Continue to look at ways to rationalise the Council's building footprint for carrying out Council operations, consolidating buildings and moving to modern working styles.	100
Waste reduction activities	Reducing the amount of waste generated by the Council being sent to landfill sites. This requires some work to develop systems to measure actual tonnage of waste to landfill each year.	100
Fleet fuel reduction (towards ultra-low emission and zero carbon vehicles)	Installation and use of vehicle monitoring systems to optimise fleet performance and ongoing eco-driver training courses to ensure optimal use of vehicles by Council staff. Continue to investigate use of lower carbon fleet technologies and drive down annual fuel consumption in fleet vehicles (<i>see Electric Vehicle Fleet note p. 16</i>). Provide incentives to staff to use bicycles or public transport to conduct council business rather than the use of fossil-fuel powered vehicles where possible.	150
ISO 50001: Energy Management Systems across OCC significant Energy uses	Implement the ISO50001: Energy Management Systems standard over 5 years covering all significant energy uses at the Council. This will contribute towards achieving continual improvement in energy management, reducing carbon emissions, energy and water spend and gaining wider Council engagement in ways of reducing energy and water consumption across the Council's estate.	300
CO₂ reduction driven by council direct control and influence	CO ₂ reduction where the Council has direct control and influence (examples could be food waste collection benefits, tree planting carbon sequestration, Solar PV on OCC domestic properties where tenants are paying the energy bills, OCC energy audits in businesses leading to reductions in city-wide CO ₂ emissions; influencing planning conditions of new developments) – <i>see below for more details</i>	250
Total		2050

Electric Vehicle fleet: towards ultra-low emission and zero carbon

The current Motor Transport (MT) strategy is to operate an emissions hierarchy when procuring vehicles, with all vehicle specifications first exploring the potential for Electric Vehicle/Hybrid replacements. MT look at existing and future technological solutions to achieve the commitments of the Council's Low Emission Strategy. All procurements of vehicles have telematics data capture installed (where possible) to provide driver and operator information to refine driver behaviours and optimise fleet management approaches to further reduce emissions.

Oxford City Council was awarded membership of the *Go Ultra Low Companies* scheme at the end of 2016 based on MT's performance to date. The initiative recognises UK organisations that have made significant efforts to embrace electric cars and vans as part of their vehicle fleets. It is run by campaign group *Go Ultra Low*, the Government Office for Low Emission Vehicles and the automotive industry. It currently has around 70 members.

Membership requires the council to commit to reach at least 5% electric fleet vehicles by 2020. Achieving this would be a strong public statement of the council's commitment to carbon reduction and clean air, offering leadership to others across Oxford and the wider region.

In this five year phase of the Carbon Management Plan, Motor Transport will continue to reduce fleet emissions. Performance of low and zero emission vehicles that are already in the fleet will be assessed and, along with continual review of potential technologies for different classes of vehicle, will inform future purchasing decisions. This will result in:

- enhanced fleet vehicle procurement based on an emissions hierarchy,

This would mean that whatever vehicle needs buying or replacing, our policy would be to select the lowest emission option. This approach is outlined in the Council's Low Emissions Strategy (LES) and Air Quality Action Plan (AQAP).

- an increased proportion of zero emission vehicles in our fleet.

The LES commits the Council to promote zero emission vehicles in the light duty fleet and to facilitate a 10% uptake of electric vehicles in the light duty sector by 2020. It also includes an action to explore further opportunities for introducing EVs across all our fleet.

The above will all contribute to continual improvement in carbon and cost reduction in this key area of Council operations.

Wider options for Carbon reduction: further discussion on CO₂ reduction driven by Council direct control and influence

The Council will seek to quantify Council driven initiatives that can lead to CO₂ reduction where it has direct control and influence and may not necessarily be within the scope of the Council's own carbon footprint. The rationale being that carbon reduction would not have taken place without proactive initiatives carried out by the Council. Examples are listed below and described in more detail in Appendix C:

- Diversion of organic municipal waste from landfill
- Tree planting as a carbon offset measure
- Purchasing Green electricity
- Solar PV on the Council's domestic properties
- Council-delivered energy audits for local businesses
- Influencing planning conditions of new developments
- Air quality initiatives with a carbon benefit

7. Developing an Energy Management System (ISO 50001)

Developing an ISO 50001 Energy Management system (EnMS) will help to further embed Carbon reduction/energy management capacity at Oxford City Council (see Appendix A for more details on ISO 50001).

This will cover all significant energy uses at the Council and contribute towards achieving continual improvement in energy management, reducing carbon emissions, energy and water spend and gaining wider Council engagement in ways of reducing energy and water consumption across the Council's estate.

This energy management system aligns with and is structured in similar ways to those recently achieved by Environmental Sustainability (ES), namely ISO 9001 (Quality Management System) and ISO14001 (Environmental Management System) standards at the Council. All are underpinned by the principle of continual improvement.

ES were one of the first organisations to gain certification for the updated ISO 14001(2015), where continual improvement was introduced. There is therefore good experience and capability around introducing continual improvement standards to the Council.

It is proposed to roll out the ISO 50001 approach initially across two flagship buildings (St Aldates Chambers and the Town Hall) in year 1 and then progress with further roll out over the 5 year carbon management plan time frame, bringing in other significant energy users such as leisure centres (working with Fusion), fleet fuel consumption and depot buildings.

Self-certification and benchmarking with other local organisations will be the proposed approach, rather than full certification which is costly.

Opportunities linked to Energy Management

The energy and water sector is fast changing and developing and it will be important to capture opportunities that emerge and continue to develop and to improve systems related to the Council's use of energy, water and fuel. This demonstrates continual improvement and best practice in energy management. Examples are described in Appendix D and listed below:

- Demand side response
- Centralised electronic processing of energy and water invoices
- Energy and Water procurement to 2020 and beyond
- Energy Service Companies
- BREEAM environmental certification standard "Very Good" as minimum for new construction and refit projects.
- BREEAM-in-Use ratings for major buildings
- International Performance Measurement and Verification Protocol

8. Funds and resources

The main mechanisms currently identified for funding low carbon technology fixes across the estate in the period to the end of 2021/22 will be:

i) The continued use of our revolving loan funds:

Salix - providing approximately £100-£160k available per year to spend on energy efficiency improvements in buildings which have a payback of 5 years or less;

and

Salix-PLUS - providing £50-£65k available per year to fund measures with longer paybacks – up to 15 years – including renewable energy technologies and fleet fuel reduction measures.

Further information on Salix and Salix Plus funding, the way it is used - including in council construction projects - and a building check list outlining the types of measures that can be explored for funding is outlined in Appendix E and Appendix F.

Though revolving loans funds have been used successfully to fund carbon reduction measures over the last few years - and this will continue - it is anticipated that the existing resource will not fully fund the implementation of measures to meet the 5% minimum carbon reduction target over the 5 year period of the new plan.

ii) Seeking additional funding

Additional funding bids will be made internally and to government as opportunities arise, to continue to deploy renewable energy installations and improve energy efficiency across the Council and in the local area.

For example, for 2016/17 a £50,000 internal budget bid was made for feasibility funding to explore ways of achieving a step up in decarbonisation of our leisure centres which represent the largest energy and water consuming sites in the Council's estate.

Given the more complex nature of larger scale projects, progress is likely to be challenging with longer lead in times to realise carbon reductions. Robust and detailed business plans for significant additional match funding requests will be required with all key staff expected to support their development. Innovative funding models will be also considered where appropriate using community share offer funding models such as those developed by the Low Carbon Hub.

Programme coordination

Based on experience and expertise built up during the most recent Carbon Management programme, the new Carbon Management Plan and energy management systems will be driven and delivered by the Energy and Natural Resources team (ENR) in Environmental Sustainability (ES).

This will require continued support and crucial input from key staff in Housing & Property, Leisure & Parks and Direct Services (Fleet and waste management) teams. This will follow the current pattern of regular Salix and carbon reduction review meetings with the Housing and Property team and re-instigating carbon management meetings between the Council and Fusion Lifestyle Ltd.

The Energy Management system (ISO 50001) will require creation of new energy management teams made up of key stakeholders in the council including a senior sponsor and management representative as the main link in the chain between the energy management delivery team and senior management.

The Energy and Natural Resources team will coordinate delivery of progress against this key corporate priority of the carbon management programme, average 5%/year minimum target described above. This will be alongside other targets that ES deliver progress on: 3%/year reduction in water use across the estate; and 40% carbon reduction across the city by 2020 via Council management of the Low Carbon Oxford programme and other initiatives– e.g. heat networks projects.

Project Management tools and techniques (based on PRINCE2) will be applied where appropriate such as in the development of Project Initiation Documents for larger scale projects, use of product-based planning techniques, and highlight reports to appropriate reporting boards.

9. Governance and ownership

All employees are responsible for contributing to the ongoing reduction of carbon emissions and to meeting targets in line with the Corporate Plan's aspirations.

The ISO 50001 energy management system will inform the make-up of energy management teams for significant energy uses (specific buildings or functions) following the framework recommended by the standard.

This will be coordinated and driven by the Energy and Natural Resources team in Environmental Sustainability though full ownership would need to be taken by key stakeholders representing, and with influence over, energy consumption linked to the significant energy use.

The plan will be owned and governed by the Clean Green Oxford or equivalent Board, with critical input from the Carbon and Natural Resource Members Board (key officers, 'A Clean Green Oxford' portfolio holder and representatives from the other main parties).

Regular highlight reports to Boards will assess progress against the Carbon Management Plan objectives in the Environmental Sustainability Team Milestone Plan. Any blockages with progress on specific areas of the plan will be escalated through 'A Clean Green Oxford' Board or equivalent without delay.

Capturing impacts of projects on carbon emissions through the Forward Plan, City Executive Board and other major Council reports will identify any potential impacts on or opportunities for the carbon management plan and 5% target. These could include planned building disposals (which lead to a reduced CO₂ footprint), refurbishments or other changes to estate operations that may present Salix or Salix-Plus funding options or any measures that may lead to an increase in annual CO₂ emissions such as building extensions, and fleet fuel consumption increases due to changed collection rounds. It will be crucial that all areas of the Council are proactive in considering these impacts and alerting the Energy & Natural Resources team.

The impacts of any CEB proposals should also be quantified in terms of their CO₂ impacts with a total tCO₂ figure estimated (e.g. if there is a proposed change of business operations to be able to assess the potential scale of overall increase or reduction in CO₂ emissions)

The plan will be reviewed quarterly for progress against target and reviewed quarterly by the governance board and periodically by CNRMB each September of the following year outlining overall progress towards meeting the year on year targets.

Monthly reporting on progress with installed measures and associated CO₂ emissions as well as water reduction will be continued via the Council's CORVU reporting system. Greenhouse Gas reporting will be continued annually to Government which will report on absolute CO₂ emissions from Council buildings and operations.

10. Engagement and communications

Raising awareness of energy, fuel and water efficiency improvements that the organisation is seeking can lead to all staff being able to make a valuable contribution to year on year CO₂ emissions reduction - tapping their knowledge and expertise in their immediate work area.

The ISO 50001 Energy Management Systems standard places a strong emphasis on staff and senior management engagement. The standard encourages the development of energy management teams focused on specific energy uses so that a targeted approach, development of specific energy performance indicators and continual improvements can be achieved.

Regular review meetings with energy management teams and communications to all staff on progress towards meeting targets will all assist with fostering wider engagement in delivering the overall aims of the carbon management plan.

Stakeholder communications will be carried out to get key messages across more consistently and also to seek ideas and input to shape the development of the plan and Energy Management System (See Appendix G).

Key stakeholder workshops will also be held to raise awareness of the carbon management plan and energy management systems approaches and to assist with continual improvement in carbon reduction and energy management.

Appendix A:

ISO 50001:2011, *Energy management systems – Requirements with guidance for use*

ISO 50001 — What is it?

ISO 50001:2011, *Energy management systems – Requirements with guidance for use*, is a voluntary International Standard developed by ISO (International Organization for Standardization).

ISO 50001 gives organizations the requirements for energy management systems (EnMS) and provides benefits for organizations large and small, in both public and private sectors, in manufacturing and services, in all regions of the world.

The standard establishes a framework for industrial plants; commercial, institutional, and governmental facilities; and entire organizations to manage energy. Targeting broad applicability across national economic sectors, it is estimated that the standard could influence up to 60% of the world's energy use.

ISO 50001 — Why is it important?

Energy is critical to organizational operations and can be a major cost to organizations, whatever their activities. An idea can be gained by considering the use of energy through the supply chain of a business, from raw materials through to recycling. In addition to the economic costs of energy to an organization, energy can impose environmental and societal costs by depleting resources and contributing to problems such as climate change.

The development and deployment of technologies for new energy sources and renewable sources can take time. Individual organizations cannot control energy prices, government policies or the global economy, but they can improve the way they manage energy in the here and now. Improved energy performance can provide rapid benefits for an organization by maximizing the use of its energy sources and energy-related assets, thus reducing both energy cost and consumption. The organization will also make positive contributions toward reducing depletion of energy resources and mitigating worldwide effects of energy use, such as global warming.

ISO 50001 is based on the management system model that is already understood and implemented by organizations worldwide. It can make a positive difference for organizations of all types in the very near future, while supporting longer term efforts for improved energy technologies.

ISO 50001 — What will it do?

ISO 50001 will provide public and private sector organizations with management strategies to increase energy efficiency, reduce costs and improve energy performance. The standard is intended to provide organizations with a recognized framework for integrating energy performance into their management practices.

The standard is intended to accomplish the following:

- Assist organizations in making better use of their existing energy consuming assets
- Create transparency and facilitate communication on the management of energy resources
- Promote energy management best practices and reinforce good energy management behaviours
- Assist facilities in evaluating and prioritizing the implementation of new energy-efficient technologies
- Provide a framework for promoting energy efficiency throughout the supply chain
- Facilitate energy management improvements for greenhouse gas emission reduction projects
- Allow integration with other organizational management systems such as environmental, and health and safety.

ISO 50001 — How does it work?

ISO 50001 is based on the ISO management system model familiar to more than a million organizations worldwide who implement standards such as: ISO 9001 (quality management), ISO 14001 (environmental management), ISO 22000 (food safety) and ISO/IEC 27001 (information security).

In particular, ISO 50001 follows the **Plan-Do-Check-Act** process for continual improvement of the energy management system (see below). These characteristics enable organizations to integrate energy management now with their overall efforts to improve quality, environmental management and other challenges addressed by their management systems.

ISO 50001 provides a framework of requirements enabling organizations to:

- Develop a policy for more efficient use of energy
- Fix targets and objectives to meet the policy
- Use data to better understand and make decisions concerning energy use and consumption
- Measure the results
- Review the effectiveness of the policy
- Continually improve energy management.

ISO 50001 can be implemented individually or integrated with other management system standards.

ISO 50001 — Who can it benefit?

Like all ISO management system standards, ISO 50001 has been designed for implementation by any organization, whatever its size or activities, whether in public or private sectors, regardless of its geographical location.

ISO 50001 does not fix targets for improving energy performance. This is up to the user organization, or to regulatory authorities. This means that any organization, regardless of its current mastery of energy management, can implement ISO 50001 to establish a baseline and then improve on this at a rhythm appropriate to its context and capacities.

ISO 50001 — To certify or not

Like all ISO management system standards, ISO 50001 can be implemented solely for the internal and external benefits it provides the user organizations and the latter's stakeholders and customers. Certification by an independent auditor of conformity of the user's energy management system to ISO 50001 is not a requirement of the standard itself. To certify or not is a decision to be taken by the ISO 50001 user, unless imposed by regulation.

Alternatives to independent (third party) certification are to invite the organization's customers to verify its implementation of ISO 50001 in conformity with the standard (second party verification), or to self-declare its conformity.

The Plan Do Check Act Cycle

The basis of the Plan Do Check Act approach is outlined below and the continual improvement cycle of an Energy management system (EnMS) is shown in Figure 1.

Plan: *conduct the energy review and establish the baseline, energy performance indicators (EnPIs), objectives, targets and action plans necessary to deliver results in accordance with opportunities to improve energy performance and the organization's energy policy.*

Do: *implement the energy management action plans.*

Check: *monitor and measure processes and the key characteristics of its operations that determine energy performance against the energy policy and objectives and report the results.*

Act: *take actions to continually improve energy performance and the EnMS.*

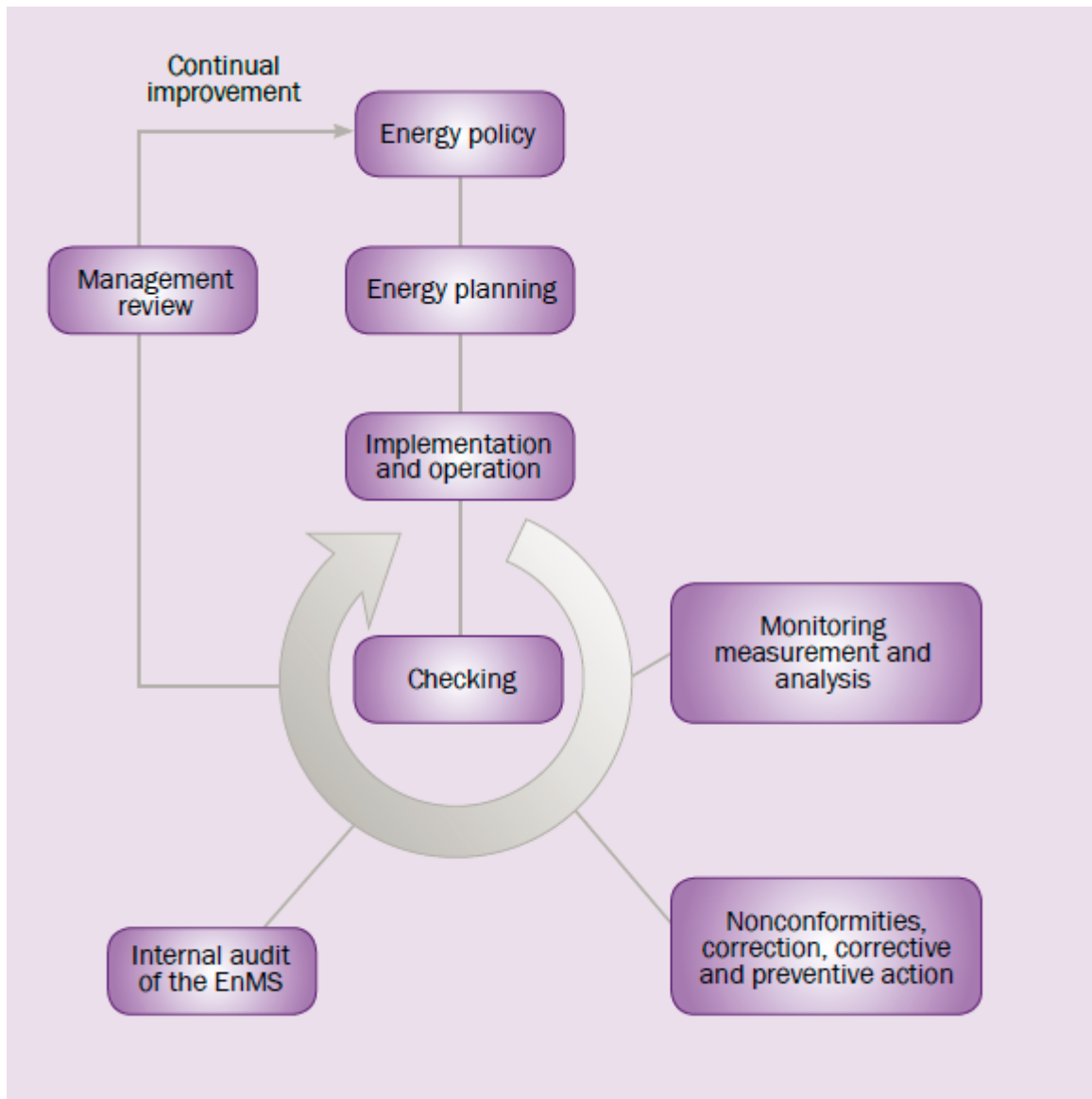


Figure 1

Information published in 2011 by the International Organization for Standardization PDF available for download [here](#)

Appendix B

Drivers and Links to key programmes at the Council (external and internal)

The carbon management plan and reducing Council-wide CO₂ emissions year on year are driven and directly affected by a number of external and internal drivers described here.

External drivers

National and international legislation and initiatives

Continuing progress in the area of energy and carbon reduction is key to meeting requirements such as those emerging from international and national legislative backdrops e.g. Climate Change Act 2008, Housing and Planning Act 2016, Heat Networks (Metering and Billing) 2014, UK requirements under the Energy Performance of Buildings Directive (Energy Performance Certificates, Display Energy Certificates), and Government Greenhouse Gas Reporting requirements.

Low Carbon Oxford

In 2010, the City Council launched the Low Carbon Oxford (LCO) Charter on behalf of the Oxford Strategic Partnership, bringing together organisations from across the City to tackle climate change and its impacts. This pioneering approach brings together private and public sector bodies, the universities and community groups as Pathfinders in a collaborative approach to creating a sustainable, low carbon economy in our city.

Each organisation has committed to a 3% year on year reduction in CO₂ emissions. Signatories include Oxford City Council, University of Oxford, Oxford Brookes University, Oxfordshire County Council, Mini Plant Oxford, Unipart, Thames Valley Police, Grosvenor Estates, Oxford Student Hubs and the Hub Commercial Venture, Stagecoach, Marks & Spencer, B&Q, Buildbase, Serco, a2dominion, 2degrees, Blake Laphorn and community groups such as Low Carbon West Oxford. Oxford City Council continues to lead and develop this programme and continual improvement in carbon reduction and energy management will complement the aims of this city-wide initiative.

Covenant of Mayors

Oxford City Council has signed up to the Covenant of Mayors global initiative so continual improvement in carbon reduction will be a key driver in meeting the pledges agreed. Heralded as the “world’s biggest urban climate and energy initiative” by Commissioner Miguel Arias Cañete, the Covenant of Mayors for Climate & Energy brings together thousands of local and regional authorities voluntarily committed to implementing EU climate and energy objectives on their territory.

New signatories now pledge to reduce CO₂ emissions by at least 40% by 2030 and to adopt an integrated approach to tackling mitigation and adaptation to climate change.

Internal drivers

Corporate Plan 2016-2020

A Clean, Green Oxford is one of the Council's key overarching corporate priorities recognising that "environmental sustainability is key for the planet, the nation and the city". The Council's vision is for a city that is "energy efficient, rich in biodiversity and has a growing resource of fossil-free energy and a demonstrably lower environmental footprint".

Continual improvement in carbon/energy management within the City council's own estate and operations will play a key role in meeting this critical corporate priority to aspire towards reaching world class performance in energy and carbon management. This also sets a leadership approach for influencing similar within Oxford city and further afield through employees actions at home and both public and private sector organisations in the County and UK.

https://www.oxford.gov.uk/downloads/file/1756/corporate_plan_2016-20

Council internal strategies and plans that will have key dependencies or should have close links with the carbon management plan include:

Asset Management Plan

Driven by Corporate Property, the Asset Management plan provides a statement of how the Council is managing its land and buildings, setting future direction and provides a framework for Corporate decision making on property. This will be important for planning and prioritising carbon reduction and management approaches in Council owned and operated buildings, providing clearer understanding of the priorities and identifying potential areas of cross-over with the Carbon Management Plan – eg development/regeneration projects, Council housing development and leisure centre development substantive work programmes.

Housing Energy Strategy 2016 - 2020

As a social landlord, the Energy Act 2011 places a number of responsibilities on Oxford City Council, primarily to ensure that all properties in the portfolio reach Energy Performance Certificate level E or above by April 2018. Energy is also a major concern for Council housing tenants, a sign that the fear of energy bills is a key issue for them.

The three main drivers to this strategy are:

1. Meeting our responsibilities under the Energy Act 2011 and future obligations (such as the Housing and Planning Act)
2. Improving the energy efficiency of and carbon reduction in council homes
3. Further reducing fuel poverty in Council housing tenants.

Whilst outside of the scope of the Council's carbon and energy management plan which focuses on the buildings that the council owns and operates and pays energy/water bills for directly, there are close synergies which complement both approaches. For example, learning and

sharing approaches taken to continue to drive down energy and water consumption and making use of housing stock as potential sites for further development of renewable energy generation capacity in the city.

Leisure (Fusion Lifestyle) Management Plan

Leisure centres, currently being managed by Fusion Lifestyle Ltd, account for over 30% of the Council's carbon footprint. Continuing cooperation from Fusion in reducing energy consumption and carbon emissions in these buildings will be crucial to the Council keeping on track with its year on year targets. The revised Carbon Management plan will be a key source of reference for on-going City Council and Fusion energy and carbon management project collaboration. This will help to drive and review progress on implementation of Salix funded and other carbon reduction initiatives in leisure buildings. Leisure centres are significant energy use areas that will also be clear targets for incorporating into a ISO 50001 energy management system.

Waste Management Strategy (including internal recycling)

Development of the Council's latest Waste Management strategy should give due consideration to potential impacts on carbon emissions from municipal waste collection approaches. Any changes in round collections or waste disposal routes may have an impact on fleet fuel consumption (e.g. from refuse trucks and tippers) and hence affect Council carbon emissions.

There are very good carbon emissions reduction reasons for expanding the collection of waste/recycling to reduce the amount of the municipal waste stream going to landfill (as well as the usual economic and wider environmental reasons). Whilst overall carbon emissions may decrease for Oxford in such a scenario, the operational footprint of Oxford City Council could increase.

Consolidation and continuation of the council-wide internal recycling scheme (with review of roles/responsibilities for ongoing delivery and improved data collection systems) will ensure that the Council's own generated waste sent to landfill is continued to be reduced (waste to landfill is one area of scope of the Council's CO₂ emissions, see Section 4 below).

Sustainability Strategy: Oxford City Council

The Sustainability strategy is much broader in scope and coverage than the Carbon Management Plan and outlines approaches for improving air quality, biodiversity, land quality, flood defences in the City of Oxford and reducing carbon emissions. The Carbon and Energy Management plan is a key daughter document feeding into the overall sustainability strategy.

Fleet Management Strategy

The Council fleet is managed by the Direct Services fleet management team. Good progress has been made in developing the electric vehicle stock in the fleet and implementing fuel efficiency initiatives (eg technical fixes like rev limiters and staff driver-training). Developing closer links with fleet management within the overall Carbon and Energy management approach (including scope of an Energy management system – ISO50001) will assist with developing continual improvement in fleet fuel efficiency and performance.

Procurement Strategy

Continued engagement with the procurement team on developing a sustainable procurement strategy will be crucial in driving down energy, water and fuel spend and associated carbon emissions as a result of our purchasing decisions. Continual development of the Council's sustainable procurement strategy and raising awareness of the carbon implications of our purchasing decision across the Council will assist with continual improvement in energy management and carbon reduction. For example specifying A+++ white goods, and driving suppliers to improve their environmental standards (e.g. by adopting 14001 or 50001 environment or energy management systems.)

DRAFT

Appendix C

Wider options for carbon reduction

Further discussion on CO₂ reduction driven by Council direct control and influence

The Council will seek to quantify Council driven initiatives that can lead to CO₂ reduction where it has direct control and influence and may not necessarily be within the scope of the Council's own carbon footprint. The rationale being that carbon reduction would not have taken place without proactive initiatives carried out by the Council. Examples are described below:

Diversion of municipal waste from landfill: This could include food and other waste collection benefits leading to diversion of waste from landfill to generate renewable power or heat via anaerobic digestion or incineration. Where the council is directly increasing collection of such waste streams (and having to consume additional fleet fuel to do so) then net CO₂ savings will be quantified and reported against the Council's overall carbon reduction target.

Tree planting as a carbon offset measure: Council-driven efforts planting additional trees across the city than would have been present otherwise will lead to carbon sequestration that could be quantified and reported as a CO₂ reduction measure. Additional benefits could include reduced heat island effects in the City environment where lack of trees and vegetation in an urban setting can lead to higher than normal localised temperatures.

Purchasing Green electricity: The Council's current energy purchasing strategy allows for scope to purchase renewable energy. Where available, and if accompanied with Renewable Energy Guarantee of Origin Certification (REGO), the council will seek to secure renewable energy supplies and quantify and report net CO₂ savings from such activity. A 2% premium compared to conventional energy prices is allowed in the current energy purchasing strategy.

Solar PV on OCC domestic properties: The Council has installed Solar PV on a number of its own domestic properties where tenants are paying the energy bills (i.e. not currently included in the Council's carbon footprint) and may continue to do so in future where funding and resources allow. This could be included as a CO₂ reduction measure as renewable energy generation and associated carbon reduction would not have happened without Council intervention.

OCC energy audits in businesses: The Council may in future conduct energy audits in local businesses and facilitate carbon reduction projects in the buildings. The work may lead to reductions in CO₂ emissions that would not have happened without Council intervention. The Council will

seek to quantify and report the estimated emissions reductions from such initiatives.

Influencing planning conditions of new developments: The Council's planning conditions currently call for a minimum of 20% on-site energy production through the use of renewable energy or low-carbon technologies on developments over a certain size (2000m² or 10 units residential). This leads to reducing the environmental impact and CO₂ emissions the buildings would have had without the Council's conditions in place. Quantification of carbon benefits will be assessed on future larger scale developments and considered as a Council CO₂ reduction initiative in future reporting.

Air quality initiatives with a carbon benefit:

The Council's introduction of the Low Emissions Zone in the Oxford City Centre and other air quality initiatives has led to a significant increase in lower carbon forms of transport – such as hybrid buses. There is a direct causal link between the LEZ and reduced CO₂ emissions which could be considered as a Council CO₂ reduction initiative in future reporting.

DRAFT

Appendix D

Related areas and opportunities linked to energy management

The energy and water sector is fast changing and developing and it will be important to capture opportunities that emerge and continue to develop and to improve systems related to the Council's use of energy, water and fuel.

Examples are described below:

- **Demand side response (DSR)** opportunities to reduce carbon emissions and also to earn potential revenue for the council. This is where the Council could get a financial reward from the grid operator for reducing energy demand at peak times of the day. For example, slightly reducing loads at the Ice Rink at peak times of grid demand could earn annual revenue (estimated to be approximately £16,000 per year) without compromising ice quality or rink operations. This has been successfully employed at major operators like Planet Ice & Silver Blades national chain of ice rinks.
- Maintain **Centralised electronic processing of energy and water invoices** to ensure energy and water billing is accurate and that significant billing errors are avoided. The Energy and Natural Resources team has introduced and is leading on the delivery of a new energy and water bill validation system that has been in place since January 2016. The team now processes over 8000 invoices electronically per year which are validated now prior to payment (a process that was not in place before hand). This is returning bill savings on average of around £70,000 per year as well as significantly reducing staff time in processing invoices. The side benefits include improved energy and water consumption data for future budgeting and forecasting accuracy. This activity will be continued and built upon in future. It may also present possible revenue opportunities where the Council can provide Energy Bureau type services to other public sector organisations or businesses.
- **Energy and Water procurement to 2020.** The Energy and Natural Resources team currently manages and coordinates the council's energy and water contracts as outlined in CEB report from February 2016 (Energy & Water Supply Procurement – 2016 to 2020). Within this process purchase of energy from renewable energy sources will be sought where available and with agreement each year from the lead member and senior management team with supplies only validated with Renewable Energy Guarantees of Origin (REGOs) being considered.
- **Energy procurement after 2020:** continue tracking developments in the energy and water markets in preparation for

contract renewals in October 2020 and developing an appropriate procurement approach for the council.

- **Energy Service Companies (ESCOs)**: consider as a carbon reduction mechanism for any major new build or refurbishment projects without the need for major capital outlay. ESCOs can fund the capital cost and take on the risk of operation and maintenance of low carbon power and heating retrofit or new build solutions in buildings, typically over a 20 year period. In return the user would pay an agreed unit energy price for the energy consumed at the start of the project. At the end of the 20 year period the plant is paid for and passed back to the user.
- Implement a requirement for a minimum “Very Good” **BREEAM certification standard** for new construction and refit projects. This covers improved energy performance but also covers a number of other environmental indicators. BREEAM certification focuses on the whole lifecycle impacts of buildings meaning that it goes beyond the focus of the project budget and can lead to much improved environmental and financial performance over the lifetime of the building.
- Attain **BREEAM-in-Use** ratings for all major buildings in the Council estate to help bridge the gap between theoretical and actual environmental performance of new build and retrofit projects.
- International **Performance Measurement and Verification Protocol (IPMVP)**. In line with aspirations to achieve ISO 50001 standards of operation, continued use of Measurement and Verification techniques such as IPMVP will be employed where appropriate to assess more robustly the impacts of Energy conservation measures implemented as part of the Carbon Management plan. This also demonstrates continual improvement and best practice in energy management.

Appendix E:

Salix and Salix-Plus funding for carbon reduction

There are two funding pots available that can be used to fund energy (and water) efficiency upgrades and installing renewable energy technologies across Oxford City Council's estates and operations:

Salix

Salix is a revolving loan match fund that the Council has had in place since 2008 following successfully winning a fund application to create a £405k funding pot (i.e. £200k match funding received from government). The fund can only be used on energy efficiency projects that meet certain criteria e.g. maximum of 5 years payback and at a cost of no more than £100 per tCO₂ saved over the lifetime of the project.

The fund remains in a ring-fenced reserve at the Council that must be operated to strict scheme rules. The Council is required to submit annual fund statements signed off by the Head of Finance each year to the fund administrator, Salix Finance Ltd.

Given the Council's success in the use of the fund, further money has been won from government to grow the funding pot in recent years to a total of £605k. As the fund is a recycling fund, the total annual loan payments coming back in to the fund each year from projects already installed yields around £100k to £160k per year. This can be used on energy efficiency upgrade projects within Council assets that consume electricity and gas (i.e. emit CO₂ emissions), are on the Council's carbon footprint and where the Council is the bill payer.

The fund is designed to be energy budget neutral in that the annual energy savings from any energy efficiency upgrade implemented in a building fund the cost of the installation over the payback period.

Since the start of the use of the match fund in 2008, the Council's £305k investment has levered in £300k of government match funding enabling the council to invest over £1m on energy efficiency upgrades across its estate, reducing carbon emissions by over 1700 tonnes per year and energy savings of ca. £350k per year.

The Energy & Natural Resources team (ENR) manage the fund, identify energy efficiency projects, develop the business case for any upgrades and coordinate installation of the energy efficiency projects. The fund is focused on energy efficiency upgrades in buildings and can contribute up to five year's worth of annual estimated savings from energy efficiency upgrades.

ENR has the resource to do the majority of the energy assessments and calculations required (or engage appropriate assistance where required), though potential Salix-funded projects need to be rapidly identified by relevant teams managing the projects and factored in to considerations where work is underway on buildings or being considered for upgrade, refurbishment or replacement of old kit being planned. Alerting the Energy and Natural Resources team at early design stages of any projects will ensure maximum use of the Salix fund and also help drive further reductions in Carbon emissions and associated whole-life cycle energy spend.

Salix Plus

Salix Plus is a council owned recycling fund pot – that is operated in a similar way to the Salix match fund but is operated and owned solely by OCC (i.e. nothing to do with Salix Finance Ltd but the Salix name has been used to indicate that it is operated in a similar manner).

This can be used to boost funding on Salix projects that go beyond a 5 year payback period (up to a maximum of 15 years) and also directly for funding carbon reduction measures not viable from the Salix fund. This means funding can be used on other carbon reduction measures such as improving water efficiency, installing renewable energy technologies as well as reducing fleet fuel consumption and waste sent to landfill sites.

Approximately £600k of Salix Plus money has been committed to date since 2013/14 and has predominantly been used to fund the installation of renewable energy technologies in Council-operated buildings such as leisure centres, sheltered housing blocks, offices and depot buildings. The Council now generates the equivalent of over 8% of its own electricity through onsite generation.

A further £200k is available during 2017/18 which will be targeted for use on additional renewable energy investments and also as client contributions to boost the Salix projects where the paybacks go beyond 5 years.

Use of Salix and Salix Plus funding in buildings

Salix and Salix Plus can be used both in the new build elements and refurbishments in buildings with slight variations in how the fund is used.

New buildings - use of Salix fund

Salix can fund the on-cost to a lower energy solution in new building projects. In order to calculate an estimated annual saving it is necessary to consider the technology cost and estimated energy consumption per year if a minimum building regulation solution was installed and to compare this with a lower energy solution that goes beyond building regulations.

Salix can fund the on-cost to the lower technology solution excluding the installation cost as this has already been costed into the project and would be happening anyway. For example, comparing what annual energy consumption would be in a building with standard compact fluorescent lighting versus an LED equivalent and controls. Contributions of up to 5 years of savings are possible with Salix, and Salix Plus can be used as a client contribution where paybacks are beyond 5 years – up to a maximum of 15 years payback (subject to availability of funds).

Refurbishments or Upgrades – use of Salix fund

Salix can be used to fund the supply and install of lower energy solutions in existing buildings. Again Salix Plus can be used as a client contribution as described above. See Appendix F for a list of possible measures.

DRAFT

Appendix F:

Building energy efficiency and lower carbon measures check list

The following is a list of possible low carbon measures that could be incorporated and potentially funded or part-funded with Salix and Salix Plus in buildings. The list is not exhaustive but gives an indication of the main areas of opportunity.

- Boilers – upgrade to gas condensing (or see renewable energy technology options below)
- Building management systems and controls
- Cooling techs - e.g. evaporative cooling (if there is any cooling requirement - otherwise employ natural ventilation strategies)
- Hand-driers – low energy/improved efficiency – e.g. Dyson
- Heating – heat recovery, TRVs, zone control valves
- Hot water – point of use
- Insulation
 - Building fabric – Cavity Wall Insulation (inc going beyond building regulations in new build)/internal wall insulation (old school building); roof/loft insulation, double or secondary glazing
 - Draught-proofing
 - Pipework insulation (retrofit or beyond building regulations)
 - Other – radiator reflective foil, air curtains (ambient/heated)
- LED Lighting and controls (including wireless controls)
- Metering and monitoring (install meters to measure energy and water consumption, possibly down to the level of power, lighting, heat and other – e.g. 'modbus' or pulse enabled metering – with remote monitoring platform)
- Renewable energy technologies for providing power and heating e.g. in new buildings consider Solar PV (plus possibly battery storage) and Ground Source/Air source Heat pumps.
- Time-switches (e.g. on small equipment)
- Ventilation – heat recovery, distribution/presence controls
- **Other:** Solar control film; light pipes, water efficiency measures – low flow WCs, percussion/PIR controlled spray taps; grey water recycling

Fleet fuel reduction measures

The Salix Plus fund can be used for funding of fleet fuel reduction measures such as in-cab fuel efficiency systems (eg rev limiters, or driver awareness devices).

Waste to landfill reduction measures

The Salix Plus fund can be used for funding of measures to reduce the amount of operational waste (i.e. the Council's own generated waste) that is sent to landfill. Greenhouse Gas emissions arising from landfill sites are some of the most damaging to the environment.

Appendix G:

Stakeholder communications

The following table defines the key parties anticipated to have an interest in the Carbon Management Plan and Energy Management System and the means and frequency of engaging them. This list is not exhaustive and may be developed further following further input from stakeholders during the project implementation phase

Stakeholder	Information/interest Requirements from Project (two way)	Communication Channel	Date or Frequency	Responsible individual
Internal stakeholders				
Chief Executive and Senior Management Team (Peter Sloman, Caroline Green, and the directors)	Key sponsor/senior user- two way – key stakeholders	1-2-1, team meetings, emails/phone calls	Quarterly/ad-hoc as required	Jo Colwell
Tim Sadler/Jo Colwell (Environmental Sustainability)	Key sponsor/Senior User – two way – key stakeholder	1-2-1, team meetings	Fortnightly/ad-hoc as required	Paul Spencer/Paul Robinson
Stephen Clarke (HoS), Martin Shaw, Keith Reynolds; Housing & Property and relevant Board (CAMAC)	Senior Supplier – two way – key stakeholder	Board/Project Team meetings/liaison meetings (Salix)/email/phone calls	Monthly minimum/ad-hoc as required	Jo Colwell/Paul Robinson
Ian Brooke (Hos); Lucy Cherry; Stuart Fitzsimmons, Leisure and Parks	Senior Supplier – two way – key stakeholder	Project Team meetings/liaison meetings (Salix)/email/phone calls	Monthly minimum/ad-hoc as required	Jo Colwell/Paul Robinson
Jane Winfield (HoS); Nick Twigg, Regeneration & Major Projects and relevant Board (CAMAC)	Senior Supplier – two way –key stakeholder	Board/project Team meetings/liaison meetings (Salix)/email/phone calls	Monthly minimum/ad-hoc as required	Jo Colwell/Paul Robinson
Graham Bourton (HoS); Bruce Thompson, Ian Direct Services, Ian Bourton (Fleet)	Senior Supplier – two way – key stakeholder	Project Team meetings/liaison meetings (Salix)/email/phone calls	Monthly minimum/ad-hoc as required	Jo Colwell/Paul Robinson
Caroline Wood; Neil Lawrence; Business Improvement & Technology	Keep informed (input on large value procurement requirements)	Email/phone calls/council matters/intranet	monthly	Paul Spencer/Nathan Kirwan
Human Resources & Facilities; (HoS):)	Keep informed/two way key stakeholder on facilities side	Email/phone calls/council matters/intranet	Twice yearly	Nathan Kirwan
Law& Governance, (HoS)	Keep informed – general info – advise on any legal issues with contracts etc	Email/phone calls/council matters/intranet	Twice yearly	Nathan Kirwan
Customer Services, Helen Bishop	Keep informed – low level	Email/council matters/intranet	Twice yearly	Nathan Kirwan

Finance, Nigel Kennedy (HoS); Lyn Barker, Tracy Cheng, Anna Winship	Keep informed – input on budget / -salix/salix admin	Team meetings/liaison meetings (Salix)/email/phone calls/ Quarterly review meetings (energy billing)	Monthly minimum/ad-hoc as required	Paul Spencer/Andrew Sunderland
Policy, Culture & Communications; Peter Mc Quitty/Tom Jennings	Keep informed – website/	Email/council matters/intranet	Twice yearly/launch event/external comms	Nathan Kirwan
City Development (Planning); Patsy Dell (Hos); Mark Jaggard/Rich Wyatt (policy, NRIA etc)		Email/council matters/intranet	Twice yearly	Jo Colwell
Elected members (Executive - Bob Price, John Tanner; Van Coulter, Greens, Lib Dem and other party reps	two way – key stakeholder /Keep informed – website/	Early drafts to Exec Board member (John T as per CEB process)/liaison meetings CNRMB/email/phone calls/ launch event	Quarterly board meetings (CNRMB); November and April	Jo Colwell/Paul Spencer
All OCC staff	Keep informed – website/	Email/council matters/intranet/launch event	March 2017 (launch of new CMP)	Nathan Kirwan/Paul Spencer
External stakeholders				
Fusion lifestyle ltd (operating OCC leisure centres)		Team meetings/liaison meetings (Salix)/email/phone calls	Nov 2016 draft, March 2017 launch and quarterly thereafter	Paul Spencer/Lucy Cherry
Salix Finance Ltd		Email;/phone calls	March 2017 after launch	Paul Spencer
Carbon Trust		email	March 2017 after launch	Paul Spencer
University Estates Dept /Oxford Brookes/Oxfordshire Environment partnership group/Low Carbon Oxford pathfinders	Benchmarking	Face to face meeting, email/phone calls	Early draft end Nov 2016 and March 2017 after launxh	Nathan Kirwan/Paul Spencer
APSE		Email	March 2017 after launch	Nathan Kirwan/Paul Spencer
General Public		Your Oxford./internet	March 2017 after launch	Nathan Kirwan/Paul Spencer

This page is intentionally left blank

Appendix 2_ Risk Register

Title	Risk description	Opp/ threat	Cause	Consequence	Date Raised	Owner	Gross		Current		Residual		Comments	Controls				
							I	P	I	P	I	P		Control description	Due date	Status	Progress %	Action Owner
CMP1	Stakeholder dissatisfaction	T	Customer or stakeholder dissatisfied with scope/objectives of Carbon Management Plan	leading to damage to City Council's standing and need for revisions to the Plan	01/11/2016	Jo Colwell	3	2	3	2	2	1		Stakeholder consultation at early stages of CM Plan development - regular communication on objectives/progress to Clean Green Board or equivalent and Carbon and Natural resources Members Board	31/01/2017	in process		Paul Spencer
CMP2	Failure to meet targets	T	Failure to achieve targets / objectives set out in the Carbon Management Plan	leading to reduced ability to mitigate against energy spend increases/reduce CO2 emissions, and reputational damage	01/11/2016	Jo Colwell	3	3	3	3	2	1		Staff awareness and Salix funds rolled out consistently - comms/action plans in place for delivery. Cleaner Greener Board enforcement and highlighting of responsibilities to all service heads so that action is cascaded down to all teams/factored in to dept objectives	31/03/2022	in process		Paul Spencer
CMP3	Lack of engagement	T	Lack of engagement on Carbon Management Strategy by Council staff	meaning targets harder to achieve and reduced ability to mitigate against energy spend increases/reduce CO2 emissions.	01/11/2016	Jo Colwell	3	3	3	3	2	1		Develop and deliver robust communications plan to provide regular updates on progress and to encourage staff engagement./buy-in to the CMPlan . Clean Green Board or equivalent enforcement and highlighting of responsibilities to all service heads so that action is cascaded down to all teams/factored in to dept objectives. Implementing ISO50001 standard to help embed more formal systems of engagement	31/03/2019	in process		Paul Spencer
CMP4	Funding and resources cuts	T	Introduction of new funding and resources cuts that threaten delivery of the Carbon Management Plan	leading to failure to meet targets and reduce rate of energy spend/CO2 emission reductions	01/11/2016	Jo Colwell	3	4	3	4	3	2		Build robust business cases for invest to save funding and or external funding. Reduced target/objectives in line with available resource for delivery	31/03/2022	in process		Paul Spencer
CMP5	Salix funding	T	Reduced resources due to funding or resources cuts meaning ability to maximise use of Salix fund is limited	leading to requirement to pay funds back to DECC (up to £300k max)-	01/11/2016	Jo Colwell	3	4	3	4	3	1		Salix delivery plan in place with responsibility for key service areas to proactively consider use of Salix fund for any viable projects/maintain regular meetings/comms with Corp Property/Leisure to ensure Salix considered for any major refurb/upgrade projects or where any opportunities to move to lower energy solutions are identified/viable	31/03/2022	in process		Paul Spencer

365

This page is intentionally left blank

Minutes of a meeting of the CITY EXECUTIVE BOARD on Thursday 19 January 2017



Committee members:

Councillor Price (Chair)	Councillor Brown
Councillor Hollingsworth	Councillor Kennedy
Councillor Rowley	Councillor Sinclair
Councillor Smith	Councillor Tanner

Officers:

Jackie Yates, Executive Director Organisational Development and Corporate Services
Caroline Green, Assistant Chief Executive
Lindsay Cane, Acting Head of Law and Governance
Nigel Kennedy, Head of Financial Services
Peter McQuitty, Corporate Lead - Culture & the Arts
Paul Wilding, Programme Manager Revenue & Benefits
Sarah Claridge, Committee Services Officer

Also present:

Councillor Marie Tidball, Chair, Scrutiny Devolution Review Group
Councillor Andrew Gant, Liberal Democrat Group Leader, Liberal Democrat shadow member for Corporate Strategy & Economic Development, Chair, Scrutiny Committee

111. Apologies for Absence

Apologies received from Cllr Simm and the Chief Executive.

112. Declarations of Interest

None

113. Addresses and Questions by Members of the Public

None received

114. Councillors Addresses on any item for decision on the Board's agenda

None

115. Councillor Addresses on Neighbourhood Issues

None

116. Items raised by Board Members

None

117. Commissioned Advice Strategy 2018-2021

The Executive Director for Organisational Development & Corporate Services submitted a report which proposed that a new model for funding advice services in Oxford is investigated in time to replace the current programme which ends on 31 March 2018.

Cllr Brown, Board Member for Customer and Corporate Services presented the report. She explained that the report had been rewritten after advice from the Scrutiny Committee.

The Council highly values the work of the advice agencies in the city and pays them a combined grant of £500k each year. However the government's austerity programme and cuts to local government have put pressure on our community grants.

Council proposes moving to a commissioned advice system that fits with the objectives of our Financial Inclusion Strategy. We value the work of the advice centres but need to provide services fit for the future and are geographically equitable across the city. The review will consider how we could change services to make them more efficient. This does not necessarily mean having new advice providers.

A progress report will go to CEB in September.

Cllr Price asked what kind of bodies/cost will be involved in the review. The Benefits Manager said he didn't have a fixed idea of who the reviewer would be but they would have advice services expertise and local knowledge about the sector. The review should cost less than £10k.

Cllr Tanner said that a review would be useful for determining value for money of advice centres. Centres often provide service cheaper than if the Council provided it in-house as they rely on volunteers.

Cllr Rowley said that advice centres needed to be accessible to everyone in Oxford but they also needed to retail hubs in areas of deprivation.

The County Council's approach provides an example of how not to do it. Their single provider has led to a drop in the number of people being helped. He was glad officers

were meeting with all advice centres as he felt a single tender with a single provider was unlikely to work. He felt there was a lots of potential if advice centres worked together to make improvements ie sharing volunteers, etc.

Cllr Price asked what the next step was and would other Members be involved in deciding the choice and management structure of advice services. Cllr Brown said she would know more in the next few months and would involve other board members when needed. The Executive Director of Organisational Change and Corporate Services said that other members could be briefed on developments at the Members' financial Inclusion meeting.

The City Executive Board resolves to:

1. **Agree** that work is undertaken early in 2017 to evaluate the current provision of advice services in Oxford, and to compare this with different models of provision in other parts of the country.
2. **Agree** to commission an independent evaluation of services which proposes a new funding model which ensures that the outcomes of the Council's Financial Inclusion Strategy are delivered.
3. **Agree** that all funding models should be considered in investigating the new approach, including competitive tendering, and retaining the current model.

118. Establishment of Trust arrangements to support the redevelopment of the Museum of Oxford.

The Head of Community Services submitted a report which sought to establish of a development trust to support the redevelopment of the Museum of Oxford.

Cllr Price, Board member for Corporate Strategy and Economic Development presented the report. He explained that the museum had secured a Heritage Lottery Fund (HLF) grant and had pledged to raise £300,000 from other sources. The second round of funding from HLF is dependent on the museum having secured funding for 80% of its pledge. Creating a development trust is one way the museum can raise this money through donations. This trust will have board members on the board.

Officers are also going to explore creating a charity trust to run the museum. A report will go to CEB later in the year outlining the development trust's fundraising progress and whether a charity trust is a suitable model for the museum.

The City Executive Board resolved to:

1. **Approve** the establishment of a Development Trust as a vehicle to raise funds to support the redevelopment of the Museum of Oxford.
2. **Delegate authority** to the Head of Community Services to commit up to £5,000 from existing resources in order to register the fund-raising vehicle with the Charity Commission.

3. **Delegate authority** to the Head of Community Services to agree detailed arrangements relating to the Development Trust.
4. **Delegate authority** to the Head of Community Services to explore the future establishment of a full Charitable Trust to manage the long-term development of the Museum of Oxford.
5. **Instruct** the Head of Community Services to report back to City Executive Board at a future date on progress in relation to the establishment of a full Charitable Trust. The report should include the Trust remit, revised charitable aims (objects), and a draft business plan outlining proposals for staffing, financial management and other aspects of the Trust's future development.

119. Scrutiny Committee Reports

a) Scrutiny Report: Devolution Plans for Oxfordshire

Cllr Tidball, Chair of the Scrutiny Devolution Review Group presented the report. She explained the task of the review group and outlined the methodology and findings of the group. She explained that devolution was important to local government as the UK is the most centralised country in the world and devolution deals bring some of that power to the local level. Achieving a deal could release significant government money to the county but the timeframe to agree a deal is small.

The government has specified the need for an elected mayor to provide strong accountable governance. The review group's preferred model is to keep the current Oxfordshire councils but to also have a mayoral combined authority, which would be responsible for the additional powers and money released from government.

She thanked the Scrutiny Officer and the Assistant Chief Executive for their hard work.

Cllr Tidball listed the benefits of securing a devolution deal, these included simplifying transportation infrastructure, building a new relationship with government and creating an employer led skills model.

She explained that the secured Cambridge-Peterborough devolution deal included significant money for social housing.

Recommendation 9 of the report suggests how the governance of a combined authority could work, including details of decision-making/voting and the ability of the combined authority to overrule a mayor. It also recommends devolving from the combined authority to the county and district councils the power to discharge functions where appropriate.

The report discusses possible local government re-organisation in Oxfordshire and outlines the strengths and weaknesses of the different models in Appendix 2. It is recommended this list be used to build consensus between Oxfordshire authorities.

A mayor would provide strong accountable decision making and could speed up decision-making by removing loggerheads.

She explained that the City is an economic hub in the county and the demographic makeup of the city needs to be shown in the decision making structure of either re-organisation model

Cllr Price thanked Cllr Tidball, Cllr Gant, and the Scrutiny Officer for the report.

The Assistant Chief Executive updated the board on the progress made in drafting a devolution deal. She explained that the Review Group's report had been very helpful to assist the decision making of the working group (made up of representatives from all Oxfordshire local authorities and LEP).

Following on from CEB agreeing the Statement of intent, to support a devolution deal with a combined authority in December, the working group has been revising its proposal. It has three objectives:

1. Housing, planning , infrastructure and transport - and has updated details on how devolved money would work for these
2. Skills; and
3. Governance arrangements – to review the government's requirements needed to secure a devolution deal, and learn from authorities that have secured deals in the last year.

The County Council launched its one council model today. It is out for public consultation until 14 March. The working group need to make sure work is progressed before the County considers their one council proposal.

The Assistant Chief Executive will update the Growth Board at the end of month.

Cllr Tanner asked what the likelihood of either proposal going ahead was. Cllr Price said that the message from the autumn statement was that government had two priorities, housing and economic growth. Devolution is seen as a way of achieving both of these. The government is pressing ahead to agree further devolution deals in Cambridgeshire, and Teeside, which suggests that devolution is the mechanism they wish to use.

The County Council's refusal to accept that there is not a consensus on re-organisation risks working against the combined authority proposal. The combined authority might fall at the democratic fence if authorities don't agree to take part.

Councillor Hollingsworth noted the emphasis on the Oxford-Milton Keynes-Cambridge corridor and questioned whether the Review Group had considered the possibility of a devolution deal based on a wider geographical footprint (e.g. including parts of Buckinghamshire), given that the county borders broadly date back to Saxon times.

Cllr Tidball said that the Group had considered this but felt that Oxfordshire could be identified as being city region (covered by one LEP) and that a wider geography would be too unwieldy and risk diluting democratic accountability. However, an Oxfordshire combined authority would provide a mechanism for joint working with other combined

authority areas (e.g. the West Midlands) in the form of joint committees covering a wider geography.

Cllr Gant said that the review group had considered different models of re-organisation. The report didn't rule out re-organisation, but outlined concerns in terms of strong accountable governance, and high quality service delivery with all unitary models.

Cllr Tidball said that any net savings of re-organisation would need to be reconsidered in light of changes to the financial settlement and business rate retention, and a unitary authority's ability to generate revenue and efficiencies

Cllr Brown said the opportunity of securing a devolution deal is very important. Having it held out to us and not trying to grasp it is wrong. Oxfordshire's economy will suffer if we don't secure a deal and we need to do everything we can to secure one.

The Assistant Chief Executive explained the report had been circulated to all Oxfordshire councils and the working group. She said she would send it to the media as well.

The Review Group's work on governance structures and the tests involved are very helpful in assisting how a combined authority could operate.

Cllr Price said that getting a devolution deal is only the beginning. Cambridge and Peterborough are already onto their second round of devolution which included social care. There is danger that people around the table might not want the deal to work.

Cllr Rowley said the Council's short to medium term priority must be to gain the benefits of devolution.

Cllr Brown said it was important the Council reached out to our partners, the LEP and key businesses in Oxfordshire and explain to them the benefits of our proposal and why the County Council's unitary option isn't the best. We must work collaboratively with the other district councils to spread the message that a 'no mayor deal' won't work and by pursuing it the County risks derailing the combined authority devolution bid.

The Assistant Chief Executive said that ultimately the decision maker is government.

The City Executive Board agreed all the recommendations listed in the Devolution Review Group report.

120.Minutes

The Board resolved to APPROVE the minutes of the meeting held on 15 December 2016 as a true and accurate record.

The meeting started at 5.00 pm and ended at 6.00 pm