

Agenda

Cabinet

This meeting will be held on:

Date: **Wednesday 10 December 2025**

Time: **6.00 pm**

Place: **Long Room - Oxford Town Hall**

For further information please contact:

Dr Brenda McCollum, Committee and Member Services Officer,
Committee Services Officer

📞 01865 252784

✉ DemocraticServices@oxford.gov.uk

Members of the public can attend to observe this meeting and.

- may submit a question about any item for decision at the meeting in accordance with the [Cabinet's rules](#)
- may record all or part of the meeting in accordance with the Council's [protocol](#)

Details of how City Councillors and members of the public may engage with this meeting are set out later in the agenda. Information about recording is set out later in the agenda and on the [website](#)

Please contact the Committee Services Officer to submit a question; to discuss recording the meeting; or with any other queries.

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All public papers are available from the calendar link to this meeting once published

Cabinet Membership

Councillors: Membership 10: Quorum 3: No substitutes are permitted.

Leader/ Chair

Cabinet Members

| | |
|-------------------------------|-------------------------------------------------------------------------|
| Councillor Susan Brown | Leader, Partnership Working |
| Councillor Ed Turner | Deputy Leader (Statutory) - Finance and Asset Management |
| Councillor Lubna Arshad | Cabinet Member for a Safer Oxford |
| Councillor Nigel Chapman | Cabinet Member for Citizen Focused Services and Council Companies |
| Councillor Alex Hollingsworth | Cabinet Member for Planning and Culture |
| Councillor Chewe Munkonge | Cabinet Member for a Healthy, Fairer Oxford and Small Business Champion |
| Councillor Anna Railton | Cabinet Member for a Zero Carbon Oxford |
| Councillor Linda Smith | Cabinet Member for Housing and Communities |

Apologies received before the publication are shown under *Apologies for absence* in the agenda. Those sent after publication will be reported at the meeting.

Decisions come into effect after the latest of the expiry of the post-meeting councillor call in period; reconsideration of a called-in decision; or Council's agreement of recommendations.

Oxford City Council, Town Hall, St Aldate's Oxford OX1 1BX

Agenda

Items to be considered at this meeting in open session (part 1) and in confidential session (part 2).

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

| | Pages |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| 1 Apologies for Absence | |
| 2 Declarations of Interest | |
| 3 Minutes of the previous meeting Recommendation: That Cabinet resolves to approve the minutes of the meetings held on 19 November 2025 and 04 December 2025 as a true and accurate record. <i>The minutes from the meeting held on the 4th of December will be circulated as a supplement to the agenda.</i> | 13 - 18 |
| 4 Addresses by members of the public Public addresses relating to matters of business for this agenda, up to five minutes is available for each public address. The request to speak accompanied by the full text of the address must be received by the Director of Law, Governance and Strategy by 5.00 pm on Thursday, 04 December 2025 . | |
| 5 Councillor addresses on any item for decision on the Cabinet agenda Councillor addresses relating to matters of business for this agenda, up to five minutes is available for each address. The request should be received by the Director of Law, Governance and Strategy by 5.00 pm on Thursday, 04 December 2025 . | |

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6 Councillor addresses on Neighbourhood Issues

7 Items raised by Cabinet Members

8 Reports from the Scrutiny Committee

The Scrutiny Committee will meet on 2 December 2025 to consider the following items. Report and recommendations, including those from its working groups, will be published as a late supplement.

- Devolution
- Authority Monitoring Report and Infrastructure Funding Statement
- Housing Complaint Handling Performance (Q1 and Q2)
- Building Safety & Compliance (Q1 and Q2)
- Draft Resident Involvement Strategy 2025-28
- Decarbonisation update: Impact of Energy Efficiency Funding programmes (LAD1b and SHDF) and EPC programme
- Net Zero Tracker
- Air Quality Action Plan
- Biodiversity Strategy and Environment Act update
- Treasury Management Annual Report

9 Quarterly Integrated Performance Report - Q2 2025/26

19 - 40

The Group Finance Director submitted a report for Cabinet to note the update on Finance, Risk and Corporate Performance matters at 30th September 2025.

Cabinet is recommended to:

- Note the financial position for quarter 2 (Q2) 2025/26 including forecast outturn, as well as the current position on risk and performance at 30th September 2025.

10 Medium Term Financial Strategy 2027-28 to 2029-30 and 2026-27 Budget for Consultation

41 - 144

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The Group Finance Director submitted a report to propose a Medium-Term Financial Strategy and the 2026/27 Budget for consultation.

Cabinet is recommended to:

1. Approve the 2026-27 General Fund and Housing Revenue Account budgets for consultation and the General Fund and Housing Revenue Account Medium Term Financial Strategy as set out in Appendices 1-10, noting:
 - a. The Council's General Fund Budget Requirement of £30.945 million for 2026/27 and an increase in the Band D Council Tax of 2.99% or £10.67 per annum representing a Band D Council Tax of £367.38 per annum assuming it is confirmed that the authority is able to do so.
 - b. The Housing Revenue Account budget for 2026/27 of £68.2 million and an increase of 4.8% (average of £8.47 per week) in social dwelling rents from 1 April 2026 (see paragraphs 90-92) giving a revised weekly average social rent of £143.40 as set out in Appendix 5.
 - c. The increase in shared ownership rental in accordance with the lease as shown in paragraph 93-94
 - d. The General Fund and Housing Revenue Account Capital Programme as shown in Appendix 6.
2. Agree the fees and charges shown in Appendix 7
3. Delegate 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 29-30 of the report.

11 **Annual Monitoring Report and Infrastructure Funding Statement**

145 -
224

The Director of Planning and Regulation submitted a report to seek Cabinet's approval of the Authority Monitoring Report and Infrastructure Funding Statement for publication.

Cabinet is recommended to:

1. **Approve** the Authority Monitoring Report and Infrastructure

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Funding Statement 2024/25 for publication.

2. **Authorise** the Director of Planning and Regulation to make any necessary minor corrections not materially affecting the document prior to publication.

12 **Approval of the revised Local Development Scheme 2025-2030**

225 -
238

The Director of Planning and Regulation submitted a report to request Cabinet's approval of the Local Development Scheme 2025-2030, which sets out the work programme for the revised Oxford Local Plan 2045.

Cabinet is recommended to:

1. **Approve** the Local Development Scheme 2025-2030;
2. **Authorise** the Director of Planning and Regulation Services to make any necessary minor corrections not materially affecting the document prior to publication.
3. **Agree** the change to the Oxford Local Plan period from 2022-2042 to 2025-2045

13 **Tenancy Strategy and Tenancy Policy**

239 -
308

The Director of Housing submitted a report to Cabinet to request that Cabinet recommend to Council approval of the updated new Tenancy Strategy and Tenancy Policy.

Cabinet is recommended to:

1. **Approve** the draft Tenancy Strategy and Tenancy Policy.
2. **Recommend to Council** to approve and adopt the draft Tenancy Strategy and Tenancy Policy.
3. **Delegate** authority to the Director of Housing, in consultation with the Cabinet Member for Housing and Communities, authority to update the Tenancy Strategy and Tenancy Policy with minor amendments to keep the documents up to date with any future changes in legislation, regulations, governance and best practice.

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| 14 | Resident Involvement Strategy | 309 - 354 |
| <p>The Director of Housing submitted a report to Cabinet and to request that Cabinet recommend to Council to approve the new Resident Involvement and Engagement Strategy – 2025/28.</p> <p>Cabinet is recommended to:</p> <ol style="list-style-type: none"> 1. Approve the draft Resident Involvement and Engagement Strategy (2025 – 2028) and action plan attached to the strategy which outlines how the priorities for resident involvement and engagement will be taken forward. 2. Recommend to Council to approve and adopt the new Resident Involvement and Engagement Strategy 2025-2028. 3. Delegate authority to the Director of Housing, in consultation with the Cabinet Member for housing and Communities, on approval of the strategy, to put in place the necessary governance and monitoring arrangements to oversee the implementation and delivery of the strategy as well as to make any minor amendments reflective of legislative changes or best practice. | | |
| 15 | Procurement Strategy | 355 - 388 |
| <p>The Group Finance Director submitted a report to request that Cabinet recommend to Council approval to a three-year Procurement Strategy.</p> <p>Cabinet is recommended to:</p> <ol style="list-style-type: none"> 1. Consider the draft Procurement Strategy 2026-2029 (at appendix 1); and 2. Recommend to Council that the draft Procurement Strategy be adopted. | | |
| 16 | Fleet Procurement Report | 389 - 392 |
| <p>The Group Finance Director submitted a report to request that Cabinet delegate authority to the Group Finance Director for</p> | | |

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the remainder of the current financial year to award any fleet contracts valued in excess of £750k following a compliant procurement process.

Cabinet is recommended to:

- **Delegate** authority, for the remainder of the current financial year, to the Group Finance Director to award contracts with values in excess of £750k for the purchase of fleet vehicles.

17 **Land Quality Strategy 2025**

393 -
422

The Head of Environmental Sustainability submitted a report to request that Cabinet agree the adoption of the Land Quality Strategy 2025.

Cabinet is recommended:

1. To approve the revised Land Quality Strategy for adoption.
2. To continue to endorse the approved procedure for dealing with contaminated land by:
 - Using the development control regime wherever possible in order to assess and remediate land affected by contamination.
 - Where this is not possible we will utilise powers under Part 2a of the Environmental Protection Act (1990) in order to ensure contaminated land is remediated.
3. Note that if works are required under Part 2a Of the Environmental Protection Act (1990), then this will be funded from contingencies and reserves.

18 **Treasury Annual Report**

423 -
434

The Group Finance Director submitted a report to Cabinet which sets out the Council's Treasury Management activity and performance for the financial year 2024/25, (including any prudential borrowing limits which are in line with the capital programme and proposed financing), in line with requirements from CIPFA's code of practice.

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Cabinet is recommended to:

- Note the Treasury Management Annual Report for 2024/25 and the Council's compliance with the Prudential and Treasury Indicators.

19 Dates of future meetings

Meetings are scheduled for the following dates:

- 21 January 2026
- 11 February 2026
- 18 March 2026

All meetings start at 6.00 pm.

Matters Exempt from Publication

If Cabinet wishes to exclude the press and the public from the meeting during consideration of any of the items on the exempt from publication part of the agenda, it will be necessary for Cabinet to pass a resolution in accordance with the provisions of Paragraph 4(2)(b) of the Local Authorities (Executive Arrangements) (Access to Information) (England) Regulations 2012 on the grounds that their presence could involve the likely disclosure of exempt information as described in specific paragraphs of Schedule 12A of the Local Government Act 1972.

Cabinet may maintain the exemption if and so long as, in all the circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information.

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Information for those attending

Recording and reporting on meetings held in public

Members of public and press can record, or report in other ways, the parts of the meeting open to the public. You are not required to indicate in advance but it helps if you notify the Committee Services Officer prior to the meeting so that they can inform the Chair and direct you to the best place to record.

The Council asks those recording the meeting:

- To follow the protocol which can be found on the Council's [website](#)
- Not to disturb or disrupt the meeting
- Not to edit the recording in a way that could lead to misinterpretation of the proceedings. This includes not editing an image or views expressed in a way that may ridicule or show a lack of respect towards those being recorded.
- To avoid recording members of the public present, even inadvertently, unless they are addressing the meeting.

Please be aware that you may be recorded during your speech and any follow-up. If you are attending please be aware that recording may take place and that you may be inadvertently included in these.

The Chair of the meeting has absolute discretion to suspend or terminate any activities that in his or her opinion are disruptive.

Councillors declaring interests

General duty

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

What is a disclosable pecuniary interest?

Disclosable pecuniary interests relate to your* employment; sponsorship (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; licenses for land in the Council's area; corporate tenancies; and securities. These declarations must be recorded in each councillor's Register of Interests which is publicly available on the Council's website.

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". 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.

Members' Code – Other Registrable Interests

Where a matter arises at a meeting which directly relates to the financial interest or wellbeing** of one of your Other Registrable Interests*** then you must declare an

interest. You must not participate in discussion or voting on the item and you must withdraw from the meeting whilst the matter is discussed.

Members' Code – Non Registrable Interests

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

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

You must not take part in any discussion or vote on the matter and must not remain in the room, if you answer in the affirmative to this test:

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

- a. to a greater extent than it affects the financial interests of the majority of inhabitants of the ward affected by the decision and;
- b. a reasonable member of the public knowing all the facts would believe that it would affect your view of the wider public interest You may speak on the matter only if members of the public are also allowed to speak at the meeting.”

Otherwise, you may stay in the room, take part in the discussion and vote.

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

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

*** Other Registrable Interests: a) any unpaid directorships b) any Body of which you are a member or are in a position of general control or management and to which you are nominated or appointed by your authority c) any Body (i) exercising functions of a public nature (ii) directed to charitable purposes or (iii) one of whose principal purposes includes the influence of public opinion or policy (including any political party or trade union) of which you are a member or in a position of general control or management.

How Oxford City Councillors and members of the public can engage at Cabinet

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 working days before the meeting (eg for a Tuesday meeting, the deadline would be 9.30am on the Friday before). Questions can be submitted either by letter or by email (to cabinet@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 Cabinet 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 Cabinet 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 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 Cabinet member who has political responsibility for the item for decision may respond or the Cabinet 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 Cabinet. The member seeking to make an address must notify the Head of Law and Governance by 9.30am at least one working day before the meeting, giving outline details of the issue. Priority will be given to those members who have not already addressed the Cabinet within the year and in the order received. Issues can only be raised once unless otherwise agreed by the Cabinet. The Cabinet'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 Cabinet members

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

Minutes of a meeting of the Cabinet on Wednesday 19 November 2025



Committee members present:

| | |
|--------------------------|------------------------|
| Councillor Brown | Councillor Turner |
| Councillor Arshad | Councillor Chapman |
| Councillor Hollingsworth | Councillor Munkonge |
| Councillor Railton | Councillor Linda Smith |

Officers present for all or part of the meeting:

Caroline Green, Chief Executive

Tom Hook, Deputy Chief Executive – City and Citizens’ Services

Emma Jackman, Director of Law, Governance, and Strategy

Nigel Kennedy, Group Finance Director

Joshua Curnow, Supervising Senior Licensing Officer

Richard Adams, Community Safety Service Manager

Dr Brenda McCollum, Committee and Member Services

Also present:

Councillor Alex Powell, Chair of Scrutiny

Apologies:

No apologies were received

86. Declarations of Interest

None.

87. Minutes of the previous meeting

Cabinet resolved to **approve** the minutes of the meetings held on **22 October 2025 and 10 November 2025** as true and accurate records.

88. Addresses by members of the public

Cabinet received one address from a member of the public.

Address from Bashir Ahmed to Cabinet.

Delay to the emissions standard policy

When the Oxford taxi trade was presented with the proposals on 10th January 2019 to change from diesel taxis to electric taxis, 6 years seemed a reasonable time for the transition but unfortunately then came COVID-19. The Taxi trade lost four years because of the coronavirus

Along came the new trend of people working from home which has continued as people are still working from home

To make matters worse the closure of Botley Road.

We have lost all our work to Botley and beyond. There is no guarantee when the Botley Road will reopen. As if this wasn't bad enough, last summer the summer of 2024, the nightclubs in Oxford permanently shut their doors and closed down. There are no night revellers during the week nor the weekends. The city centre has become a ghost town.

With licensing of Uber in Oxford in December 2024

We have witnessed private hires from Southampton, Portsmouth, Wolverhampton and further away operating in Oxford.

Uber is a £53 billion international company. It's subsidises fares during the promotional periods which no other private hire operator or the Hackney carriage trade can match. But once established, they have peak and off-peak crazy prices.

LEVC cost

The price of the electric taxi has gone up again. Now from £75,000-£82,000, that is if bought on cash, but on interest it is £105,000. It's a lot of money.

The 40 Proprietor is in Oxford who have changed to electric taxis, most of them but not all of them took advantage of the £7000 government grant which at that time reduced the price of the electric taxi down to £55,000 cash price and of course, the price of the new electric taxi was significantly less then to what it is now.

£5000 local council grant was also granted to drivers who had purchased the electric taxi. This also included three years of Taxi License fee relief. Plus the cheaper electricity making it a very viable package to run the electric taxi.

But in current times, the cost of electric to charge the electric taxi has gone up from 18p per kw/h to 74p per kw/h. And the grants are no longer available from our council and the government has reduced its plug in grant if purchasing a new taxi.

Zero emissions zone and other licensing authorities giving extension to their licence holder to change to more greener vehicles

Initially the expanded ZEZ in Oxford was planned for 2025, but it has now been delayed. We have been informed that the implementation will not take place until at least 2028, following a public consultation.

Given the new timeline, we think it's very reasonable that we are given more time so we can prepare for this better.

Other licensing authorities have their own strategies for tackling high levels of emissions. Given the difficult financial climate that taxi drivers are facing across the country, various licensing authorities have granted extra time for drivers to switch their vehicles to low emission or zero emission ones. This is a significant consideration.

Such authorities are:

- 1) South Cambridgeshire who are expected to give their drivers to 2030 to change over.
- 2) Coventry licensing authority are seriously considering pushing back their policy to 2030
- 3) Both Rochdale and Manchester strategies are matched and delayed their emission standards till 2030
- 4) Reading's policy has set a target of 2028 where all vehicles must be a minimum of ULEZ.

Conclusion

We have demonstrated our intent that we want to work with the city council and 40% of our proprietors have changed over to the electric taxis.

Any concerns about air pollution in the city is more than mitigated in the context of the introduction of 159 electric buses on the city bus routes in 2024 as well as 40 new London style taxis. We are doing our bit for the environment.

We would like to thank the city council but feel that additional latitude is required for the transition given all of the circumstances explained.

Councillor Brown explained the legal advice that Cabinet had received, which caused this decision to move from the Licensing Committee to Cabinet. She said that in future, they would take these types of decisions at Licensing Committee, following changes to the constitution to allow this later in the month.

Councillor Railton provided Cabinet's response to the address from the member of the public.

Councillor Railton noted that they would address the key concerns of the member of the public in their discussion of the report.

89. Councillor addresses on any item for decision on the Cabinet agenda

None received.

90. Councillor addresses on Neighbourhood Issues

None received.

91. Items raised by Cabinet Members

None.

92. Reports from the Scrutiny Committee

The Scrutiny Committee met on 11 November 2025 to consider the following item.

- Hackney Carriage Vehicle Emission Standards Amendment

Councillor Alex Powell presented the Committee's conversations and recommendations regarding the report. He noted that the discussion was extensive and outlined the concerns of members of the Scrutiny Committee regarding the correct governance route for this decision. Councillor Powell said that the Committee considered the impact of Local Government Reorganisation and how this should influence the decision.

- **Recommendation 1:** To have consistency with emissions standards policies for both Private Hire Vehicles and Hackney Carriage Vehicles.
- **Recommendation 2:** In the event that Cabinet approves the delay to the implementation of the Hackney Carriage Vehicle Emission Standards Amendment to align with Local Government Reorganisation, they will review this once the timescale been defined.

Councillor Railton responded to the recommendations from Scrutiny Committee. She said that Cabinet was not accepting the first recommendation but were accepting the second one. She noted that it would not be feasible to accept the first recommendation, due to the implications of Local Government Reorganisation. She also noted that the Cabinet response to the first recommendation in the Scrutiny supplement should be replaced with the following wording:

Given the wider context of the recommendation for Hackneys, the same uncertainty lies with LGR for decisions around harmonising PHV standards with those of Hackneys. It would therefore not be a good use of a (large amount) of officer time to undertake this work at this time.

93. Deferral of the commencement of the Hackney Carriage Vehicle Emission Standards

The Deputy Chief Executive, Citizen and City Services, had submitted a report to Cabinet to consider a delay to the final phase of emission standards for Hackney Carriage Vehicles licensed by this Authority.

Councillor Railton presented the report. She explained that in January of 2026, there was an existing requirement for Hackney Carriages to become fully electric. She outlined the three options detailed in the report, and noted their preferred

recommendation, to delay the implementation of the Ultra-Low Emissions Vehicle Standards for hackney carriage vehicles, to be revisited by such successor organisation that results from Local Government Reorganisation. She also noted the challenges facing the trade and drivers, which influenced their approach to the recommendation before Cabinet. Councillor Railton said that they did not want to disadvantage local taxis, as compared to other taxi drivers that may come into the area due to Local Government Reorganisation. She said that this recommendation was supportive of the opinions of taxi drivers and the relevant economic data.

Councillor Turner spoke in support of the recommendation. He emphasised the importance of the taxi trade in Oxford and acknowledged that they were an authority which regulates more closely than others. He recognized the challenges faced by the trade and drivers, including the lack of people out during the night and the closure of the Botley road. He noted the high quality and important work of the taxi drivers in Oxford and stated the importance of members using their positions to voice concerns to central government.

Councillor Brown agreed with Councillor Turner on the importance of local authorities being the organisations which regulate the local taxi trade.

Councillor Hollingsworth agreed with the points made by Councillors Turner and Railton. He agreed that it had been quieter in nighttime hours in the city centre. He asked for clarity regarding the legal position and governance route being taken by Cabinet. Councillor Hollingsworth asked about the legal advice they had received and why it was necessary for Cabinet to take this decision, instead of the Licensing Committee.

Emma Jackman, the Director of Law, Governance, and Strategy, responded to the question from Councillor Hollingsworth. She said that the advice was based on a limited case which looked particularly at taxi licensing. In line with general practice, she would agree with Councillor Hollingsworth and said that she did not have concerns that this was a wider issue. However, due to a particular case on taxi licensing, the Council was advised to take this governance route.

Councillor Brown agreed that this was a one off, particular case. She noted that if they'd had more time, they would have amended the constitution first and then taken this decision at Licensing Committee. However, she said that they did not want to leave the trade in limbo, and they wanted to give the trade and drivers certainty as soon as possible. She noted that the report and recommendations before them were the same as those presented to the Licensing Committee.

Cabinet resolved to:

- **Approve** the delay to the implementation on the 1 January 2026 of the Ultra-Low Emissions Vehicle Standards for hackney carriage vehicles, to be revisited by such successor organisation that results from Local Government Reorganisation.

94. Dates of future meetings

Cabinet noted the dates of future meetings.

Matters Exempt from Publication

If Cabinet wishes to exclude the press and the public from the meeting during consideration of any of the items on the exempt from publication part of the agenda, it will be necessary for Cabinet to pass a resolution in accordance with the provisions of Paragraph 4(2)(b) of the Local Authorities (Executive Arrangements) (Access to Information) (England) Regulations 2012 on the grounds that their presence could involve the likely disclosure of exempt information as described in specific paragraphs of Schedule 12A of the Local Government Act 1972.

Cabinet may maintain the exemption if and so long as, in all the circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information.

The meeting started at 18:00 and ended at 18:28.

Chair

Date: 10 December 2025

When decisions take effect:

Cabinet: after the call-in and review period has expired

Planning Committees: after the call-in and review period has expired and the formal decision notice is issued

All other committees: immediately.

Details are in the Council's Constitution.

To: Cabinet

Date: 10 December 2025

Report of: Group Finance Director (Section 151 Officer)

Title of Report: Integrated Performance Report for Quarter 2 2025/26

| Summary and recommendations | |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------|
| Decision being taken: | To note the update to the Cabinet on Finance, Risk and Corporate Performance matters at 30 th September 2025 |
| Key decision: | No |
| Cabinet Member: | Cabinet Member for Finance and Assets |
| Corporate Priority: | All areas |
| Policy Framework: | Corporate Plan |

| Recommendation(s): That the Cabinet resolves to: |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Note the financial position for quarter 2 (Q2) 2025/26 including forecast outturn, as well as the current position on risk and performance at 30 th September 2025. |

| Appendix No. | Appendix Title | Exempt from Publication |
|--------------|-----------------------------------------------------------|-------------------------|
| Appendix A | General Fund – September 2025 Forecast Outturn | No |
| Appendix B | Housing Revenue Account – September 2025 Forecast Outturn | No |
| Appendix C | Capital Programme – September 2025 | No |

Introduction and background

1. This report updates the Cabinet on the financial, corporate performance and corporate risk positions of the Council at 30th September 2025.

Financial Position Overview

2. **General Fund (GF)** – The General Fund is reporting a projected 2025/26 adverse variance of £0.641 compared to the 2025/26 latest budget; this is almost static to the forecast adverse variance of £0.656m reported at 1Q.
Further detail is provided in paragraphs 6 to 8 of this report and in Appendix A.
3. **Housing Revenue Account (HRA)** – At Q2 2025/26 the HRA year to date position indicates a favourable variance of £1.398m mainly due to additional income of £0.212m, a favourable variance on responsive and cyclical repairs of £0.940m and a favourable variance of £0.182m for bad debt provision.

The HRA projected outturn for 2025/26 indicates a favourable overall variance of £0.089m due to responsive and cyclical repairs forecast to be overspent by £0.170m by year-end and pressures on dwelling rent of £0.220m arising from delayed acquisitions.

More information is provided in paragraphs 9 to 11 of this report and Appendix B.

4. **Capital Programme** – The 2025/26 budget, as approved at the Council meeting in February 2025, was set at £179.014m. The carry forward of unspent balances in 2024/25, additional budget changes including new allocations, further revisions to the council's loans to its housing company and the HRA property purchases programme since the setting of the budget in February, leads to a revised 2025/26 latest budget of £182.899m.

The 2025/26 forecast outturn at Q2 is £180.947m which is indicating minimal slippage of £1.952m (1%) compared to the revised latest budget

Further detail and analysis are provided in paragraphs 12 to 17 of this report and in Appendix C.

5. **Corporate Risk Management** – At the end of Q2 2025/26 in the latest update to the current Corporate Risk Register there are 14 risks registered, of which six are red risks, eight are amber risks. There are no new risks and no closed risks. Overall, whilst there is no change in the total number of each category of risk from Q1, within these figures there is a change in classification of two corporate risks:

- Flood – this risk has been reclassified from a red risk in 1Q to an amber risk in 2Q
- A failure to meet Social Housing (Regulation) Act 2023 customer/consumer standards – this risk has been reclassified from an amber risk in 1Q to a red risk in 2Q

More details on the Council's corporate and service risks can be found in paragraphs 18 to 23 of this report.

Financial Position Detailed Analysis

General Fund Revenue

6. The overall Net Budget Requirement for 2025/26 agreed by the Council in February 2025 was £30.25m after a £3.38m transfer to general reserves.
7. Following budget virements and the release of the central pay contingency between directorate budgets and earmarked reserves in 1Q, the 2025/26 latest budget remains in balance.
8. At 2Q there is an adverse projected 2025/26 outturn variance of £0.641m compared to the 2025/26 latest budget.

This most significant variances, by service area, are attributed to:

Information & Technology – the adverse projected outturn of £0.7m assumes cyber incident response costs to total circa £0.5m in the current financial year. Mitigation of ongoing cost overruns, e.g. dual running telephony services contracts, will be dependent on the ability to capitalise ICT staffing costs to budgeted ICT capital projects; £0.562m having been capitalised in the first half of the year.

Planning & Regulatory – the projected adverse outturn variance of £0.125m is due to a forecast shortfall of income across the service area compared to budget which is partially offset by some salary savings

ODS and OXplace Client - a favourable outturn to budget of £1.0m is projected for 2025/26. This assumes maintenance of existing April to September 2025 income patterns across the city centre, suburban and Park & Ride car parks collectively throughout the remainder of 2025/26, with car parking management costs similarly rising.

The budgeted dividend return from ODS is £2.0m and from OXplace £4.889m. Although neither dividend has been declared yet, it is expected that the total will be in line with the budget.

Financial Services – there is a projected outturn variance of £0.758m for 2025/26 arising from expected pressures in:

- Revenues and Benefits £0.292m – adverse outturn variances on printing, postage and carriage of £250k related to council tax and business rates billing and £45k subscriptions overspend on NEC Solutions Revenues/ Non-Domestic Rates processing.

Decentralisation of the printing and postage budget from corporate print room is insufficient to cover printing and postage costs for the Revenues Service. Reductions in printing costs associated with the annual billing of business rates and council tax are planned although these savings will materialise from 2026-27 onwards.

- Salaries Establishment cost pressures of £0.394m across the service area from job regrades, appeals and subsequent increments, the requirement for unbudgeted agency staffing for coverage of staff absence and including short-term support to assist with 2024/25 financial year-end closedown tasks.

- £0.072m cost pressure from a combination of adverse expenditure on subscriptions, fees for tax returns and asset valuation services in respect of preparation of the statement of accounts. The service for the latter is currently subject to a tendering exercise.

Chief Executive Team – an adverse variance of £0.15m is forecast at year-end due to pressure on the consultancy budget for work on the Local Government Reorganisation (LGR) programme and a lower than budgeted ability to recharge salary costs to the capital programme.

Law, Governance & Strategy – there is a projected adverse outturn variance of £0.462m across the service area for 2025/26 which can be mainly attributed to staff costs due to the payment of market allowances and other remuneration increments, difficulty in recruiting lawyers and increasing dependency on locums to provide resource capacity to meet service demands.

People Team – a favourable variance of £0.1m is forecast for 2025/26 arising principally from lower than budgeted expenditure on staff training, Apprenticeship Levy, staff advertising, staff travel discount and consultants' fees offset by expenditure exceeding budget on lone worker protection and software purchases.

Corporate Accounts – this includes the net cost of housing benefits, interest receivable from investments and payable on loan finance. At this stage the 2025/26 projected outturn for Corporate Accounts is favourable by £0.5m compared to the net budgeted cost of £2.131m, the majority of which, £1.5m, relates to the net cost of housing benefits.

Whilst a favourable outturn for 2025/26 is expected on net interest to the tune of £2.0m, since borrowing to finance the capital programme is significantly less than budgeted due to programme slippages and higher than budgeted interest receivable is anticipated, current indications suggest that this will be offset by a £1.5m increase in the net cost of housing benefits payments as supported housing benefit expenditure continues to rise. The council is actively working on mitigations to try and contain overspends largely arising from the inability to claim subsidy on supported housing accommodation benefit expenditure and the situation is being monitored.

Housing Revenue Account (“HRA”)

9. The HRA budgeted deficit agreed by the Council in February 2025 for 2025/26 was £2.603m and the latest 2025/26 budget remains the same. The current forecast outturn for 2025/26 is a deficit of £2.514m, which gives a favourable forecast outturn variance of £0.089m at 30 September 2025.
10. At Q2 2025/26, the HRA currently has a favourable variance year to date to budget of £1.398m mainly due an underspend on responsive and cyclical repairs; the budget for this expenditure category has been increased from 2024/25 and it is expected to be fully spent by 31 March 2026.

Reasons for the current year to date variance of £1.398m include:

Income – 2Q 2025/26 year to date actual income of £30.469m is higher than the corresponding budget of £30.257m by £0.212m due to:

- Dwelling rent underachieving by £0.264m due to the timings of the acquisition of new homes which generate rental income, which is included in the base budget offset by :
 - An increase to service charges and garages income. Service charges budget has an additional income of £0.3m from actuals compared to estimates.
 - An increase to miscellaneous income from: leased properties rental £0.061m, lease assignments £0.042m, less £0.013m pressure on the furnished tenancies budget.

Expenditure - 2Q 2025/26 year to date actual expenditure of £14.71m is lower than the corresponding budget of £15.897m by £1.186m. This is attributed to:

- **Management and services (stock related)** is currently underspent by £0.059m, due to:
 - Salaries pressure of £0.020m; there are several vacant posts across the service including savings from the Landlord Services Team restructure £0.336m, various recharged posts that are currently vacant £0.097m, savings in the Rent Team £0.060m. This is offset by pressures of £0.513m for staff recharges from General Fund Property Services for the provision of repairs and maintenance support.
 - Overspends on supplies and services £0.065m; Council Tax payments on void properties, some of which will be refunded as the properties are relet, £0.223m; Service Charges on leasehold properties £0.037m
 - Savings of £0.403m on utilities
- **Other revenue spend (stock related)** is currently underspent by £8k arising from a saving from Rent Sense £0.032m, consultants £0.015m and EV charges unspent of £0.01m less overspends on compensation payments to tenants £0.033m and purchase card spend relating to decants £0.015m.
- **Bad debt** - a current underspend of £0.182m against the bad debt provision
- **Responsive and cyclical repairs** – there is currently an underspend of £0.94m, which is analysed in the table below.

The budget for 2025/26 was increased from the last financial year; the current saving is against the profiled budget and is likely to be spent by year end.

| | £ |
|--------------------------------|--------------------|
| Asbestos | 175,000 |
| Lifts | 7,500 |
| | 182,500 |
| Fire Safety | - 206,000 |
| Highways & Engineering | - 206,000 |
| Electrical upgrade/inspections | - 168,000 |
| Voids | - 78,000 |
| Damp and Mould Works | - 71,000 |
| Energy Improvements/repairs | - 60,450 |
| Insurance | - 58,000 |
| Disrepairs | - 53,000 |
| Env Improvements | - 44,929 |
| Disabled Adaptations | - 32,000 |
| Other | - 31,983 |
| R&M | - 31,000 |
| General Minor Works/D2D | - 25,600 |
| Trees | - 24,000 |
| Water System Testing | - 18,000 |
| Gas maintenance | - 15,000 |
| | - 1,122,962 |
| | |
| | - 940,462 |

11. The year-end forecast favourable variance of £0.089m is due to:

Income – an adverse variance of £0.081m forecast from: additional miscellaneous income of £0.139m from leased rental and assignments, less pressures of £0.025m on the furnished tenancies budget and on dwelling rent of £0.22m from delayed acquisitions.

Expenditure – a favourable forecast outturn variance of £0.17m for:

- **Management and services (stock related)** – the forecast outturn is a saving of £0.116m arising from utilities £0.266m, furnished tenancy furniture purchases £0.08m, court fees £0.06m, under occupation scheme £0.04m, new bin purchases £0.03m, salaries £0.02m less pressures in council tax spend £0.18m, housing consultants £0.17m and service charges £0.03m.
- **Other revenue spend (stock related)** – a forecast outturn saving of £0.024m for Rent Sense £0.064m less compensation payments of £0.04m
- **Bad debt** – a forecast saving at year end of £0.2m
- **Responsive and cyclical repairs** – a year-end forecast pressure of £0.17m. Damp and mould works are expected to be £0.2m (1.0%) more than the approved budget. This is offset by a £0.03m saving from the Environment Improvements budget managed by the Landlord Services Team.

Capital

12. The overall budget for 2025/26, as approved by the Council at its meeting in February 2025, was set at £179.014m. Adjusting for required carry forwards of underspends from 2024/25 and additional budget changes, including new allocations in-year and budget slippages with the budgets reprofiled accordingly, this gives a revised latest budget for 2025/26 at 30 September 2025 of £182.899m as shown in Fig.1 and in Appendix C.
13. Spend against the total budget in the period April to September 2025 (Q1-Q2) is £50.72m in total, which represents 28% of the latest budget, 29% being GF and 27% HRA. The forecast outturn variance is £1.951m due to forecast slippage.

| | Original Budget 2025/26 | Latest Budget 25/26 | Spend to 30/09/2025 | % Spend to date v Latest Budget | 25/26 Forecast Outturn at Q2 | 25/26 Forecast Outturn Variance at Q2 |
|--------------------------------|----------------------------|------------------------|------------------------|---------------------------------------|---------------------------------|---------------------------------------------|
| General Fund Total | £37,687,856 | £64,733,098 | £18,976,858 | 29% | £62,744,170 | -£1,988,928 |
| HRA Total | £141,326,133 | £118,166,248 | £31,743,176 | 27% | £118,203,248 | £37,000 |
| Total Capital Programme | £179,013,989 | £182,899,346 | £50,720,034 | 28% | £180,947,418 | -£1,951,928 |

Fig.1

General Fund Capital

14. A summary of the General Fund schemes by project classification, which has recently been reviewed, is shown in Fig.2 below and this provides an insight into the value and range of projects that the Council is undertaking. Overall, 29% of the latest capital budget has been spent by 30 September 2025. Approximately 17% of the General Fund capital programme budget relates to loans, to the council's housing company, of which 90% is spent at Q2.

| Project Classification | Latest Budget 2025/26 | Spend to 30/09/2025 | % Spend to date v Latest Budget | 25/26 Forecast Outturn at Q2 | 25/26 Forecast Outturn Variance at Q2 | Variance from Aug25 Forecast Outturn Variance |
|----------------------------|--------------------------|------------------------|---------------------------------------|---------------------------------|---------------------------------------------|--------------------------------------------------------|
| Compliance (H&S) | £319,469 | £0 | 0% | £319,469 | £0 | £0 |
| Development - Project | £15,971,647 | £2,360,138 | 15% | £15,481,647 | -£490,000 | -£490,000 |
| Feasibility | £1,014,416 | £181,796 | 18% | £999,071 | -£15,346 | -£15,346 |
| Housing - Homelessness | £927,057 | £59,902 | 6% | £927,057 | £0 | £0 |
| Housing Supply | £297,693 | £82,640 | 28% | £297,693 | £0 | £0 |
| ICT Rolling Programme | £744,747 | £432,880 | 58% | £744,747 | £0 | £0 |
| ICT Systems | £3,726,286 | £1,801,842 | 48% | £3,775,767 | £49,481 | £49,481 |
| Infrastructure | £8,971,252 | £641,443 | 7% | £9,105,124 | £133,872 | £133,872 |
| Investments - Improvements | £11,426,028 | £2,466,598 | 22% | £11,503,211 | £77,183 | £77,183 |
| Loans | £10,725,000 | £9,700,000 | 90% | £10,725,000 | £0 | £0 |
| Project | £0 | £13,425 | 0% | £0 | £0 | £0 |
| Rolling Programme | £9,742,554 | £1,134,818 | 12% | £7,998,435 | -£1,744,119 | -£1,744,119 |
| Other Capital Spend | £866,948 | £101,378 | 12% | £866,948 | £0 | £0 |
| General Fund Total | £64,733,098 | £18,976,858 | 29% | £62,744,170 | -£1,988,928 | -£1,988,928 |

Fig.2

Project classification key budgets:

- **Compliance (H&S)** - Gloucester Green Car Park (H&S)
- **Development-Project** – Blackbird Leys Regeneration; East Oxford Community Centre; Floyds Row Refurbishment; Covered Market; 1-3 George Street; Oxford Ice Rink Development; New Burial Space
- **Feasibility** – feasibility studies for various projects
- **Housing–Homelessness** - National Homelessness Property Fund; Roken House; Growth Deal Registered Provider Payments
- **Housing Supply** – affordable housing supply
- **ICT Rolling Programme** – desktop/laptop computers, telephony device refresh
- **ICT Systems** – MS365 and Cloud Migration; system upgrades
- **Infrastructure** - Cowley Branch Line; Oxford Flood Alleviation Scheme; HIF and Growth Deal Osney Bridge works and path; Controlled Parking Zones; Go Ultra Low Oxford projects; St Michael's Street Levelling Works
- **Investments- Improvement** – Car parks resurfacing, Decarbonisation Fund; Leisure Invest to Save and dilapidations works; Leys Youth Hub; Waterways investment; Broad Street roofing and façade project; Town Hall works; Stock condition surveys; Planned building maintenance
- **Loans** – OxWED Loans; loans to OxPlace, the council's housing company
- **Rolling Programme** – ODS Fleet Replacement Programme; Disabled Facilities Grants; Capitalised salaries budget.
- **Project/Other Capital Spend** - UK Shared Prosperity Fund Investment Plan; Archive scanning project

15. Key Budget Re-profile changes and Forecast slippages at Q2 include:

- **ODS Fleet Replacement Programme** – a slippage of £1.744m (30% of the budget) is forecast. A full review of the procurement process has delayed ordering new assets and informed this latest forecast. Much of the asset procurement is expected to roll over into 2026/27.
- **New Burial Space** - £0.3m slippage forecast for 2025/26 due to extended timescales of the Environment Agency and the Highways Authority to remove their objections to enable approval of planning application for change of use of land. This is necessary to allow more than 100 burials per year on the land. Planning approval expected November 2025.
- **Blackbird Leys Regenerations (GF element)** - £0.19m slippage forecast for 2025/26. Anticipated date to start on site for shell and core now slipped to October/November 2025 with completion now predicted for March 2027.
- **St. Michael's Street Levelling Works** - £0.152m pressure forecast for 2025/26 with final edge works being completed and valuation/safety audit to follow.

HRA Capital

16. A summary of the HRA schemes by project type is shown in Fig.3 below. 27% of the latest HRA Capital budget for 2025/26 has been spent by 30 September 2025. This shows that the significant element (62%) of the HRA capital programme is classified as Housing Supply, i.e. housing acquisitions and developments.

The Investment Improvements classification relates to works required, which have been included in the new programme model and include items such as Fire Safety, Structural works and decency (damp and mould, etc.).

Approximately 14% of the capital programme is a rolling programme, for example kitchen and bathroom replacements, heating, and electrics etc.

Development Projects include Masons Road Refurbishment; the East Oxford Development and Blackbird Leys Regeneration (HRA).

Other Capital Spend classification relates mainly to Southfield Park Leases.

| Project Classification | Latest Budget 2025/26 | Spend to 30/09/2025 | % Spend to date v Latest Budget | 25/26 Forecast Outturn at Q2 | 25/26 Forecast Outturn Variance at Q2 |
|----------------------------|-----------------------|---------------------|---------------------------------|------------------------------|---------------------------------------|
| Development - Project | £3,986,864 | £2,700,560 | 68% | £3,988,864 | £2,000 |
| Housing Supply | £73,246,907 | £20,335,463 | 28% | £73,246,907 | £0 |
| Investments - Improvements | £23,322,202 | £5,619,539 | 24% | £23,322,202 | £0 |
| Rolling Programme | £16,110,275 | £3,069,799 | 19% | £16,110,275 | £0 |
| Other Capital Spend | £1,500,000 | £17,814 | 1% | £1,535,000 | £35,000 |
| HRA Total | £118,166,248 | £31,743,176 | 27% | £118,203,248 | £37,000 |

Fig.3

17. There is minimal movement on the HRA capital programme between the latest budget and the forecast for 2025/26, as advised by project managers, and therefore there are no key variances to report.

Corporate Risk

18. The Council employs a 'five-by-five' risk scoring matrix, assessing risks based on probability and impact. Corporate risks are reviewed by the Corporate Leadership Team quarterly, most recently on 18 September 2025. Service level risks are reviewed periodically by Directors and Service Managers and the Risk Management Group maintains oversight of all service risks and, during its meetings, assesses whether any risks should be escalated for inclusion in the Corporate Risk Register (CRR).
19. The table below shows the number of corporate risks on 30 September 2025, categorised by level Red, Amber and Green, and the comparative number for the previous reported quarter.

| Current Risk | Q1 | Q2 |
|------------------------|-----------|-----------|
| | 2025/26 | 2025/26 |
| Red | 6 | 6 |
| Amber | 8 | 8 |
| Green | 0 | 0 |
| Total risks | 14 | 14 |
| New risks in half year | 10 | 0 |
| Closed | 8 | 0 |

At 2Q 2025/26, in the latest update to the current CRR, whilst there remain six red risks, eight amber risks, no new risks and no closed risks, there is a change in classification of two corporate risks:

- Flood – this risk has been reclassified from a red risk in 1Q to an amber risk in 2Q
- A failure to meet Social Housing (Regulation) Act 2023 customer/consumer standards – this risk has been reclassified from an amber risk in 1Q to a red risk in 2Q

The current six red risks are as follows:

- **Financial stability** – this risk concerns the Council’s ability to implement its strategic plans and corporate priorities amid increasing financial pressure. Key contributing factors include:
 - Volatility in income and expenditure
 - Inflation-driven cost escalation, affecting materials for capital projects
 - Rising service demands, such as temporary accommodation
 - Broader economic weaknesses, which may depress income streams such as commercial rents and business rates
- **A utilities infrastructure that does not meet the needs of the city** – this risk identifies that without further investment and partnership working, the city's utility infrastructure will come under increasing strain, adversely impacting citizens' well-being and the city's prosperity
- **Cybersecurity and IT infrastructure resilience** - this risk addresses the failure to prevent and respond to cyber-attacks and ensure that the Council's IT infrastructure is fit for purpose and adaptable to future needs.
- **Addressing the causes and impacts of climate change** – this risk identifies the factors that could prevent the Council from prioritising efforts to tackle the causes of climate change and mitigate its effects. Failure to do so would harm both residents and the environment.
- **A failure to deliver Temporary Accommodation strategies to meet demand and increases in homelessness** - this risk assesses the potential consequences if the Council fails to implement effective mitigation measures to control temporary accommodation costs or develop contingency plans to meet the increasing demand for homelessness prevention. It also considers the challenges of securing an adequate

housing supply through the private rented sector and the Council's development programme.

- **A failure to meet Social Housing (Regulation) Act 2023 customer/consumer standards** - this risk evaluates the potential impact if the Council, in its capacity as a landlord, fails to fully comply with the Social Housing (Regulation) Act 2023 customer standards, particularly the Safety and Quality Consumer Standard. Such a failure could result in a major incident that compromises tenant safety, leading to sanctions, regulatory intervention, and severe reputational damage.

20. The current corporate amber risks are:

- Workforce stability
- Failure to comply with governance requirements
- Political and partnership landscape – Local and National
- Increased demand for services
- Flood
- Adverse weather, terrorism, and utility outage
- The workforce and public are healthy and safe
- A failure to deliver housing priorities and business plans

21. There are no corporate green risks at 2Q

22. As part of the service planning process, all service risks are reviewed. Those no longer relevant are deleted, and any new ones are added. The table below shows the number of service risks at 30 September 2025 compared with the previous reported quarters.

| Current Risk | Q1 2024/25 | Q3 2024/25 | Q4 2024/25 | Q1 2025/26 | Q2 2025/26 |
|---------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Red | 10 | 11 | 11 | 10 | 12 |
| Amber | 44 | 43 | 42 | 52 | 56 |
| Green | 17 | 27 | 26 | 32 | 24 |
| Total Risks | 71 | 81 | 79 | 94 | 92 |
| New Risks | 0 | 10 | 0 | 25 | 0 |
| Closed | 2 | 0 | 2 | 10 | 2 |

23. The number of red service area risks at 30 September 2025 has increased from 10 to 12 since 30 June 2025. Details of the current red service risks are as follows:

- **Planning - External delays** - delays to Council projects arising from external agencies may impact overall Council performance, resulting in missed targets and reduced effectiveness.
- **Planning** - if Government legislation requiring substantial changes in the planning system results in a need for redesigned processes, then there will be a lack of capacity to meet the changes, and the delivery of local policy objectives will be undermined.

- **Property and Assets - Quality of data and property knowledge** – failure to implement an asset management system capable of storing and analysing data may hinder the Council’s ability to effectively plan and schedule work. This could result in delays to property lettings, difficulties in providing timely insurance information, and increased risk of non-compliance.
- **Law, Governance and Strategy – Resilience of service** - an inability to effectively deliver services required by the Council and to deliver critical projects and support statutory and non-statutory functions will have a direct impact on risk, compliance, expenditure, and income to the Council. Furthermore, inadequate staffing and the requirement for expertise in response to major incidents may necessitate increased reliance on external support or lead to operational delays.
- **Law, Governance and Strategy – Income target not achieved** - if the income target is not achieved, additional pressure will be placed on the overall legal services budget, leading to an overspend.
- **Law, Governance and Strategy** - the use of the budget is reactive and therefore, as unexpected corporate issues arise, external legal costs increase, which will lead to an overspend on the legal services budget, and potentially pressure on other service area budgets as they may need to fund work.
- **Law, Governance and Strategy** - if the Council’s departments and suppliers do not safeguard data there is a risk of a data protection breach and non-compliance
- **Property Assets** - if there is a lack of legal support, the Council will be unable to meet income, capital receipt, and project targets. Alternatively, external legal spend will be more costly and will result in an increase in financial pressure.
- **Housing** - if tenant involvement governance arrangements and activities are not fit for purpose and do not allow the tenant’s voice to be heard, then the Council will fail to meet its responsibilities under the Social Housing (Regulation) Act 2023.
- **Housing** - a failure to evidence the implementation of and adherence to the social housing regulator’s consumer standards across housing may result in a C3 grading following inspection.
- **Communities and Citizen Services** - an ongoing contract management and partnership approach to the external leisure provision contract, to ensure stability with its financial performance.
- **Communities and Citizen Services - Financial savings from community centres** - failure to achieve the necessary savings may result in financial pressure on the Council and/or a decline in the quality of services delivered, as cost-cutting measures may need to be implemented.

Financial implications

24. All financial implications are covered in the body of this report and the Appendices.

Legal issues

25. There are no legal implications arising directly from this report.

Level of risk

26. All risk implications are covered in the body of this report and the Appendices.

Equalities impact

27. There are no equalities impacts arising directly from this report.

| | |
|----------------------------|----------------------------------------------------------------------|
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Background Papers: 'Risk Management Reporting at 30 September 2025' report to the Audit and Governance Committee dated 21st October 2025

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Appendix A: General Fund – September 2025 Forecast Outturn

| General Fund Outturn Report 25/26 @ 30 Sep 2025 | Approved Budget (per Budget book) | Latest Budget | Latest Budget YTD | Actual YTD | % latest 2024/25 budget used YTD | Projected Outturn against Latest Budget | Projected Outturn Variance |
|----------------------------------------------------|-----------------------------------------|---------------|----------------------|------------|-------------------------------------------|--------------------------------------------------|----------------------------------|
| | 2025/26 | 2025/26 | P6 Sep-25 | P6 Sep-25 | P6 Sep-25 | 2025/26 | 2025/26 |
| | £000's | £000's | £000's | £000's | % | £000's | £000's |
| S03 - Communities & Citizen Services | 7,174 | 7,585 | 3,718 | 3,311 | 43.6% | 7,650 | 65 |
| S13 - Housing Services | 6,757 | 6,757 | 3,199 | 3,655 | 54.1% | 6,757 | 0 |
| S15 - Community Safety | 987 | 1,011 | 552 | 354 | 35.0% | 1,011 | 0 |
| S06 - Information & Technology | 5,031 | 5,031 | 2,515 | 2,852 | 56.7% | 5,731 | 700 |
| City & Citizens' Services | 19,950 | 20,384 | 9,983 | 10,171 | 49.9% | 21,149 | 765 |
| S09 - Corporate Property | -8,445 | -8,461 | -4,190 | -3,529 | 41.7% | -8,461 | 0 |
| S10 - Economy, Regeneration & Sustainability | 2,127 | 2,444 | 1,333 | 1,079 | 44.1% | 2,444 | 0 |
| S16 - Planning & Regulatory Services | 966 | 832 | 181 | 196 | 23.5% | 957 | 125 |
| Place | -5,353 | -5,185 | -2,675 | -2,255 | 43.5% | -5,060 | 125 |
| S26 - Companies Client | 7,712 | 9,512 | 8,490 | 8,130 | 85.5% | 8,512 | -1,000 |
| S01 - Corporate Communications | 605 | 596 | 298 | 268 | 44.9% | 577 | -19 |
| S32 - Financial Services | 4,811 | 4,811 | 2,509 | 3,740 | 77.7% | 5,569 | 758 |
| S33 - Chief Executive | 918 | 918 | 458 | 585 | 63.8% | 1,068 | 150 |
| S34 - Law, Governance & Strategy | 3,905 | 3,882 | 1,940 | 2,307 | 59.4% | 4,344 | 462 |
| S35 - People | 1,882 | 1,882 | 940 | 838 | 44.5% | 1,782 | -100 |
| Corporate Services | 12,121 | 12,089 | 6,145 | 7,738 | 64.0% | 13,340 | 1,251 |
| Directorate Total Excl SLA's & Capital Charges | 34,431 | 36,801 | 21,942 | 23,785 | 64.6% | 37,942 | 1,141 |
| SLA's & Capital Charges | -9,612 | -9,612 | -1,574 | -1,574 | 16.4% | -9,612 | 0 |
| Corporate Accounts | 2,131 | 2,131 | -28,474 | -28,073 | -1317.6% | 1,631 | -500 |
| Contingencies | -82 | -81 | -125 | 0 | 0.0% | -81 | 0 |
| Total Corporate Accounts & Contingencies | 2,049 | 2,050 | -28,599 | -28,073 | -1369.6% | 1,550 | -500 |
| Net Expenditure Budget | 26,869 | 29,239 | -8,231 | -5,862 | -20.0% | 29,880 | 641 |
| Transfers To/From Earmarked Reserves | 3,379 | 1,009 | -552 | -487 | -48.3% | 1,009 | 0 |
| Net Budget Required | 30,248 | 30,248 | -8,782 | -6,350 | -21.0% | 30,889 | 641 |
| Funding | | | | | | | |
| S47A - External Funding | -739 | -739 | -370 | -23 | 3.1% | -739 | 0 |
| S47B - Council Tax Funding | -16,783 | -16,783 | -8,497 | 0 | 0.0% | -16,783 | 0 |
| S47C - Parish Precept | 264 | 264 | 0 | 283 | 107.2% | 264 | 0 |
| S47D - NDR Funding | -12,989 | -12,989 | -6,495 | 0 | 0.0% | -12,989 | 0 |
| Total Funding Available | -30,248 | -30,248 | -15,361 | 260 | -0.9% | -30,248 | 0 |
| (Surplus) / Deficit for the year | 0 | -0 | -24,143 | -6,090 | | 641 | 641 |

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Appendix B: Housing Revenue Account – September 2025 Forecast Outturn

| HRA Report 25/26 @ Sept 2025 | Approved Budget (per Budget book) | Revised Approved Budget @ 30th Sept 2025 | Actual YTD | Budget YTD | Variance YTD | % Budget Spent to 30th Sept 2025 | Projected Outturn against Latest Budget @ 30th Sept 2025 | Projected Outturn Variance |
|-------------------------------------------|--------------------------------------|------------------------------------------------|-----------------|-----------------|----------------|-------------------------------------|----------------------------------------------------------------|-------------------------------|
| | £000's | £'000's | £000's | £000's | £'000's | % | £'000's | £000's |
| Dwelling Rent | (56,887) | (56,887) | (27,779) | (28,044) | 264 | 49% | (56,667) | 220 |
| Service Charges | (3,066) | (3,066) | (1,888) | (1,533) | (355) | 62% | (3,066) | |
| Garage Income | (288) | (288) | (151) | (144) | (7) | 52% | (288) | |
| Miscellaneous Income | (1,006) | (1,006) | (627) | (537) | (91) | 62% | (1,145) | (139) |
| Net Income | (61,247) | (61,247) | (30,469) | (30,257) | (212) | 50% | (61,166) | 81 |
| Management & Services (Stock Related) | 15,524 | 15,524 | 5,719 | 5,777 | (59) | 37% | 15,408 | (116) |
| Other Revenue Spend (Stock Related) | 990 | 990 | 279 | 287 | (8) | 28% | 966 | (24) |
| Misc Expenditure (Not Stock Related) | 834 | 834 | 131 | 128 | 3 | 16% | 834 | |
| Bad Debt Provision | 994 | 994 | 315 | 497 | (182) | 32% | 794 | (200) |
| Responsive & Cyclical Repairs | 18,211 | 18,211 | 8,267 | 9,207 | (940) | 45% | 18,381 | 170 |
| Interest Paid | 15,290 | 15,290 | 0 | 0 | 0 | 0% | 15,290 | |
| Depreciation | 12,040 | 12,040 | 0 | 0 | 0 | 0% | 12,040 | |
| Total Expenditure | 63,884 | 63,884 | 14,710 | 15,897 | (1,186) | 23% | 63,714 | (170) |
| Net Operating Expenditure/(Income) | 2,637 | 2,637 | (15,759) | (14,360) | (1,398) | () | 2,548 | (89) |
| Investment Income | (34) | (34) | 0 | 0 | 0 | 0% | (34) | |
| Total Appropriations | (34) | (34) | 0 | 0 | 0 | 0% | (34) | |
| Total HRA (Surplus)/Deficit | 2,603 | 2,603 | (15,759) | (14,360) | (1,398) | (605%) | 2,514 | (89) |

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Appendix C: Capital Programme – September 2025

| Capital Scheme | 2025/26 Original Budget | Latest 2025/26 Budget | Profiled Budget 30/09/2025 | Spend to 30/09/2025 | 2025/26 Budget Remaining | 2025/26 Forecast Variance | | | |
|--------------------------------------------------------|-------------------------|-----------------------|----------------------------|---------------------|--------------------------|---------------------------|--------------------------|--------------------|--------------------------|
| | | | | | | Forecast Variance | Variance due to Slippage | Over / Under Spend | 2025/26 Outturn Forecast |
| | £ | £ | £ | £ | £ | £ | £ | £ | £ |
| General Fund Capital Programme | | | | | | | | | |
| Community & Citizen Services Directorate | | | | | | | | | |
| Community & Citizen Services Projects | | | | | | | | | |
| Upgrade Existing Tennis Courts | - | 20,431 | 10,216 | (20,833) | 41,265 | - | - | - | 20,431 |
| Rose Hill Community Centre - Parking | - | 10,000 | 5,000 | - | 10,000 | - | - | - | 10,000 |
| Leys Youth Hub | - | 619,669 | 327,570 | 331,736 | 287,933 | 91,970 | 91,970 | - | 711,639 |
| Leisure Invest to Save - Leisure Contract | - | 1,013,437 | 545,565 | - | 1,013,437 | - | - | - | 1,013,437 |
| Solar PV & LEDs – Barton LC (Sport England) | - | 4,627 | 2,492 | 3,971 | 656 | - | - | - | 4,627 |
| Rose Hill CC Gym Equipment | - | 80,000 | 40,000 | - | 80,000 | - | - | - | 80,000 |
| Cuttislowe Café – Feasibility | - | 10,000 | 5,000 | - | 10,000 | - | - | - | 10,000 |
| Community Centres Review – Feasibility | - | 95,000 | 47,500 | 434 | 94,566 | - | - | - | 95,000 |
| East Oxford Community Centre | 2,124,657 | 2,550,000 | 1,268,485 | 2,140,126 | 409,874 | - | - | - | 2,550,000 |
| Street Sports Lighting Upgrade | - | 0 | 38 | - | 0 | - | - | - | 0 |
| Community & Citizen Services Projects Total | 2,124,657 | 4,403,164 | 2,251,865 | 2,455,433 | 1,947,731 | 91,970 | 91,970 | - | 4,495,134 |
| Community Safety Projects | | | | | | | | | |
| CCTV Camera & Infrastructure upgrade | - | 80,000 | 40,000 | 16,037 | 63,963 | - | - | - | 80,000 |
| Community Safety Projects Total | - | 80,000 | 40,000 | 16,037 | 63,963 | - | - | - | 80,000 |
| Housing Services Projects | | | | | | | | | |
| Replace or refurbish lifts | - | 140,000 | 34,800 | 57,541 | 82,459 | - | - | - | 140,000 |
| Floyds Row Refurbishment | - | 36,044 | 19,879 | - | 36,044 | - | - | - | 36,044 |
| National Homelessness Property Fund | - | 476,298 | 256,468 | - | 476,298 | - | - | - | 476,298 |
| Roken House | - | 178,759 | 89,380 | 59,902 | 118,857 | - | - | - | 178,759 |
| Housing Services Projects Total | - | 831,101 | 400,527 | 117,443 | 713,658 | - | - | - | 831,101 |
| Information & Technology Projects | | | | | | | | | |
| ICT Software and Licences | 245,000 | 245,000 | 122,500 | 495,620 | (250,620) | - | - | - | 245,000 |
| CRM Lagan Replacement | - | 29,659 | 14,830 | 107,312 | (77,653) | - | - | - | 29,659 |
| End-Point Devices (Desktops/Laptops) | 500,000 | 612,457 | 306,228 | 419,485 | 192,972 | - | - | - | 612,457 |
| Telephony Device Refresh | 210,000 | 132,290 | 66,145 | 13,395 | 118,895 | - | - | - | 132,290 |
| Capitalised ICT Projects | 163,200 | 85,247 | 42,624 | 360,311 | (275,064) | - | - | - | 85,247 |
| ICT - OL Exploitation Programme | 78,000 | 102,319 | 49,770 | 38,451 | 63,868 | 2,864 | 2,864 | - | 105,183 |
| ICT - Replacement of IKEN - L&G case management | - | 19,290 | 9,645 | - | 19,290 | - | - | - | 19,290 |
| ICT - Refresh of content and taxonomy of the Court | - | 23,386 | 11,693 | - | 23,386 | - | - | - | 23,386 |
| Third-party consultancy for Azure Active Directory | - | 709,334 | 354,667 | 276,820 | 432,514 | - | - | - | 709,334 |
| @W renewal or replacement | - | 75,000 | 37,500 | - | 75,000 | - | - | - | 75,000 |
| Cyber security monitoring and response service | - | 93,326 | 46,663 | 7,855 | 85,472 | - | - | - | 93,326 |
| Upgrade/replace Kirona DRS (this is an ODS system) | - | - | - | 3,742 | (3,742) | - | - | - | 0 |
| Windows security server upgrades | - | 53,449 | 26,724 | 54,500 | (1,051) | - | - | - | 53,449 |
| Migration of Mod.gov | 25,000 | 25,000 | 12,500 | - | 25,000 | - | - | - | 25,000 |
| Migration of SCC to cloud hosted alternatives | 500,000 | - | - | 8,063 | (8,063) | - | - | - | 0 |
| Replacement of Uniform IDOX (additional funding) | - | - | - | 6,675 | (6,675) | - | - | - | 0 |
| Online forms development (2x resources to accelerate) | 160,000 | 310,920 | 155,460 | - | 310,920 | - | - | - | 310,920 |
| Civica Midcall Telephone Payment System | 30,000 | 30,000 | 15,000 | - | 30,000 | - | - | - | 30,000 |
| 02 Mobile Telephony Services | 30,000 | 30,000 | 15,000 | - | 30,000 | - | - | - | 30,000 |
| Jadu CMS | 60,000 | 60,000 | 30,000 | - | 60,000 | - | - | - | 60,000 |
| ArcGIS | 150,000 | 150,000 | 75,000 | 8,537 | 141,463 | - | - | - | 150,000 |
| Class Affinity | 75,000 | 75,000 | 37,500 | 61,995 | 13,005 | - | - | - | 75,000 |
| Gov Delivery | 50,000 | 50,000 | 25,000 | 10,500 | 39,500 | - | - | - | 50,000 |
| Ricoh | 50,000 | 50,000 | 25,000 | 32,500 | 17,500 | - | - | - | 50,000 |
| Academy | 10,000 | 10,000 | 5,000 | - | 10,000 | - | - | - | 10,000 |
| Analyse Pro | 10,000 | 10,000 | 5,000 | - | 10,000 | - | - | - | 10,000 |
| Codeman Energy Module | 10,000 | 10,000 | 5,000 | - | 10,000 | - | - | - | 10,000 |
| Codeman Recycling | 10,000 | 10,000 | 5,000 | - | 10,000 | - | - | - | 10,000 |
| QLVersaa | 350,000 | 350,000 | 175,000 | 140,554 | 209,446 | 43,378 | 43,378 | - | 393,378 |
| Manage Engine | 10,000 | 10,000 | 5,000 | - | 10,000 | - | - | - | 10,000 |
| Civica Pay | 100,000 | 100,000 | 50,000 | - | 100,000 | - | - | - | 100,000 |
| UIPath (RPA) | 75,000 | 75,000 | 37,500 | 25,594 | 49,406 | - | - | - | 75,000 |
| Metric Car Parks | 25,000 | 25,000 | 12,500 | 32,396 | (7,396) | - | - | - | 25,000 |
| Northgate Housing | 10,000 | 10,000 | 5,000 | - | 10,000 | - | - | - | 10,000 |
| Penalty Notice System | - | - | - | - | - | - | - | - | 0 |
| Information & Technology Projects Total | 2,936,200 | 3,571,678 | 1,784,449 | 2,104,304 | 1,467,374 | 46,242 | 46,242 | - | 3,617,920 |
| City & Citizens Services Directorate Total | 5,060,857 | 8,885,943 | 4,476,841 | 4,693,218 | 4,192,725 | 138,212 | 138,212 | - | 9,024,155 |

| Capital Scheme | 2025/26 Original Budget | Latest 2025/26 Budget | Profilled Budget 30/09/2025 | Spend to 30/09/2025 | 2025/26 Budget Remaining | 2025/26 Forecast Variance | | | |
|---------------------------------------------------------|-------------------------|-----------------------|-----------------------------|---------------------|--------------------------|---------------------------|--------------------------|--------------------|--------------------------|
| | | | | | | Forecast Variance | Variance due to Slippage | Over / Under Spend | 2025/26 Outturn Forecast |
| | £ | £ | £ | £ | £ | £ | £ | £ | £ |
| General Fund Capital Programme | | | | | | | | | |
| PLACE Directorate | | | | | | | | | |
| Corporate Property Projects | | | | | | | | | |
| Blackbird Leys LC Improvements | - | - | - | 8,715 | (8,715) | - | - | - | 0 |
| Conversion of stored water system to mains at | - | 130,000 | 70,000 | - | 130,000 | - | - | - | 130,000 |
| Leisure Infrastructure Life Cycle Investment | 560,000 | 1,167,834 | 606,994 | 1,373,308 | (205,474) | - | - | - | 1,167,834 |
| Leisure Centre Capital Works & Replacements | 200,000 | 193,278 | 97,754 | 3,834 | 189,444 | - | - | - | 193,278 |
| Community Centres Capital Works & | - | 71,116 | 35,558 | 52,022 | 19,094 | - | - | - | 71,116 |
| Hinksey Splash | 200,000 | 32,163 | 9,233 | 5,631 | 25,532 | - | - | - | 32,163 |
| Planned Building Improvements | 750,000 | 1,621,865 | 810,932 | 139,509 | 1,482,355 | - | - | - | 1,621,865 |
| Community Centres | - | - | - | 4,710 | (4,710) | - | - | - | 0 |
| Jericho Community Centre | 200,000 | 200,000 | 100,000 | 2,425 | 197,575 | - | - | - | 200,000 |
| Cave Street Development (Standingford House) | - | 47,283 | 23,642 | (77,050) | 124,334 | - | - | - | 47,283 |
| Gloucester Green Car Park (H&S) | - | 319,469 | 159,735 | - | 319,469 | - | - | - | 319,469 |
| Capital Works at Covered Market | 888,453 | 1,037,672 | 552,030 | 130 | 1,037,542 | - | - | - | 1,037,672 |
| Old Gas Works Bridges | - | 391,825 | 198,923 | 44,549 | 347,276 | - | - | - | 391,825 |
| Regeneration Property | - | 3,402 | 1,701 | - | 3,402 | - | - | - | 3,402 |
| Port Meadow Moorings | - | 52,815 | 28,600 | 4,281 | 48,534 | - | - | - | 52,815 |
| Asset Surveys | 250,000 | 274,526 | 139,178 | 2,714 | 271,812 | - | - | - | 274,526 |
| Town Hall Options | - | 20,363 | 10,953 | 6,666 | 13,698 | - | - | - | 20,363 |
| New Burial Space | 1,323,000 | 647,636 | 329,780 | 85,374 | 562,263 | (300,000) | (300,000) | - | 347,636 |
| Enabling works - Decarbonisation Project | 638,576 | 638,576 | 319,288 | - | 638,576 | - | - | - | 638,576 |
| Stock condition surveys (including bridge works) | 300,000 | 232,169 | 127,415 | - | 232,169 | - | - | - | 232,169 |
| Town Hall Relocation | - | 410,220 | 221,418 | 16,579 | 393,641 | - | - | - | 410,220 |
| Repairs to 2-4 Gloucester Street and 24-26 | - | - | - | 100,251 | (100,251) | - | - | - | 0 |
| Tumbling Bay Embankment Works | 250,000 | 331,014 | 165,937 | 59,955 | 271,059 | - | - | - | 331,014 |
| Hinksey Pool Liner Replacement | - | 18,385 | 9,900 | - | 18,385 | - | - | - | 18,385 |
| HSBC Options | - | - | 1,654 | 135 | (135) | - | - | - | 0 |
| Covered Market masterplan and enabling works | 589,820 | 578,125 | 295,333 | 103,044 | 475,082 | - | - | - | 578,125 |
| Waterways - Condition Survey / Long Bridges | - | 9,239 | 4,620 | 16,803 | (7,563) | - | - | - | 9,239 |
| Works Town Hall | 1,000,000 | 1,231,452 | 616,127 | 223,326 | 1,008,126 | - | - | - | 1,231,452 |
| Redbridge Masterplan | - | 120,474 | 63,541 | 78,679 | 41,795 | (16,798) | (16,798) | - | 103,676 |
| Floyds Row (Feasibility 2024) | - | 24,252 | 13,011 | 7,502 | 16,750 | - | - | - | 24,252 |
| TH Archive Scanning Project | - | 335,183 | 291,995 | 101,378 | 233,805 | - | - | - | 335,183 |
| Network infrastructure installations (utilities) | 40,000 | 54,749 | 28,913 | 10,726 | 44,024 | - | - | - | 54,749 |
| Waterways investment | 500,000 | 377,326 | 188,663 | - | 377,326 | - | - | - | 377,326 |
| Stone walls & Railing programme | - | 21,870 | 13,242 | 51,530 | (29,661) | - | - | - | 21,870 |
| Broad street roofing & Facade project | 500,000 | 355,640 | 217,020 | 6,093 | 349,547 | - | - | - | 355,640 |
| Fire Risk Assessment programme works | - | - | - | 42,575 | (42,575) | - | - | - | 0 |
| Bridge investment work | 300,000 | 45,000 | 32,151 | 5,217 | 39,783 | - | - | - | 45,000 |
| M&E Capital budget to fund capital replacement | - | 72,315 | 32,506 | 16,000 | 56,315 | - | - | - | 72,315 |
| 42&46a George St - Feasibility | - | 22,424 | 11,212 | 169 | 22,255 | - | - | - | 22,424 |
| Regeneration Property Purchase/Odeon | 9,880,657 | 10,091,659 | 5,053,984 | 17,727 | 10,073,932 | - | - | - | 10,091,659 |
| Redbridge Paddock Moorings - Feasibility | - | 10,000 | 5,000 | - | 10,000 | - | - | - | 10,000 |
| City Centre Income Strip - Feasibility | - | 60,000 | 30,000 | - | 60,000 | - | - | - | 60,000 |
| Covered Market Units Split - Feasibility | - | 16,000 | 10,000 | - | 16,000 | - | - | - | 16,000 |
| ICT - Asset Management System | 300,000 | 461,652 | 235,877 | 522 | 461,130 | - | - | - | 461,652 |
| General Fund Capital Reserve (SCS works & | 500,000 | 900,000 | 467,308 | - | 900,000 | - | - | - | 900,000 |
| Corporate Property Projects Total | 19,170,506 | 22,628,974 | 11,631,119 | 2,516,027 | 20,112,946 | (316,798) | (316,798) | - | 22,312,175 |
| Economy, Regeneration & Sustainability | | | | | | | | | |
| City Wide Cycling Infrastructure Contribution | 173,681 | 58,000 | 30,251 | 6,980 | 51,020 | (18,000) | (18,000) | - | 40,000 |
| R & D Feasibility Fund | 500,000 | 43,975 | 94,488 | - | 43,975 | - | - | - | 43,975 |
| Seacourt Park & Ride Extension | - | - | - | 4,958 | (4,958) | - | - | - | 0 |
| 1-3 George Street | 700,000 | 710,404 | 360,461 | (34,073) | 744,477 | - | - | - | 710,404 |
| Future Options for City Centre Land (Odeon) | - | - | 1,671 | 291 | (291) | - | - | - | 0 |
| Diamond Place Redevelopment | 74,770 | 80,460 | 40,469 | 4,107 | 76,353 | - | - | - | 80,460 |
| Osney Mead Path Works (HIF) | - | 423,746 | 211,873 | 1,081 | 422,665 | - | - | - | 423,746 |
| Oxford Ice Rink Development | - | 83,804 | 41,902 | 8,364 | 75,440 | - | - | - | 83,804 |
| Oxford Station Feasibility | - | 17,357 | 9,576 | 19,021 | (1,664) | 1,452 | 1,452 | - | 18,809 |
| Osney Bridge (Growth Deal) | - | 1,832,622 | 1,165,252 | 171,056 | 1,661,566 | - | - | - | 1,832,622 |
| City Cycle Schemes (Growth Deal) | - | 154,959 | 92,838 | 8,480 | 146,479 | - | - | - | 154,959 |
| City Centre Restart (CIL Funded) | - | 39,076 | 19,538 | - | 39,076 | - | - | - | 39,076 |
| Greenways Cycling Project | - | 15,514 | 7,757 | 16,252 | (738) | - | - | - | 15,514 |
| CIL Feasibility | - | 43,350 | 21,675 | - | 43,350 | - | - | - | 43,350 |
| Meanwhile In Oxfordshire | - | 79,948 | 43,140 | - | 79,948 | - | - | - | 79,948 |
| Coach Parking Feasibility | - | 19,848 | 9,924 | - | 19,848 | - | - | - | 19,848 |
| City Centre Public Realm (Kiosks Project) | - | (6,711) | (1,817) | 1,723 | (8,434) | - | - | - | (6,711) |
| St Michael's Street Levelling Works | - | 253,729 | 132,857 | 307,817 | (54,088) | 151,872 | 151,872 | - | 405,602 |
| Ice Rink Car Parking | 130,000 | 2,000 | 1,000 | 132 | 1,868 | - | - | - | 2,000 |
| Oxford Flood Alleviation HIF Contribution | - | 4,350,000 | 2,342,308 | - | 4,350,000 | - | - | - | 4,350,000 |
| Cowley Branch Line Full Business Case | 653,350 | 110,074 | 34,063 | 47,638 | 62,436 | - | - | - | 110,074 |
| Templars Square (GF Element) | 100,000 | 96,366 | 48,183 | 726 | 95,640 | - | - | - | 96,366 |
| Bury Knowle House | - | 41,000 | 20,500 | - | 41,000 | - | - | - | 41,000 |
| Union Street Car Park | - | 86,337 | 45,265 | 58,975 | 27,362 | - | - | - | 86,337 |
| Magdalen Woods Pathway | - | 58,200 | 32,815 | 57,966 | 234 | - | - | - | 58,200 |
| Council Chamber upgrade - Feasibility | - | 30,500 | 30,500 | 2,008 | 28,492 | - | - | - | 30,500 |
| Southern Quarter - Feasibility | - | 110,000 | 55,000 | - | 110,000 | - | - | - | 110,000 |
| Oxford and Abingdon Flood Alleviation Scheme | 250,000 | 249,038 | 124,519 | 4,010 | 245,028 | - | - | - | 249,038 |
| Go Ultra Low Oxford - On Street | - | 494,706 | 247,353 | 478 | 494,228 | - | - | - | 494,706 |
| Go Ultra Low Oxford - Taxis | - | 20,213 | 10,107 | 1,380 | 18,833 | - | - | - | 20,213 |
| Decarbonisation Fund - OCC element | - | 105,142 | 52,571 | - | 105,142 | - | - | - | 105,142 |
| Biodiversity Net Gain (Feasibility) | - | 48,000 | 26,115 | 2,951 | 45,049 | - | - | - | 48,000 |
| Blackbird Leys Regeneration (GF Element) | 4,866,000 | 1,230,000 | 937,186 | 114,904 | 1,115,096 | (190,000) | (190,000) | - | 1,040,000 |
| UK Shared Prosperity Fund Investment Plan | - | 371,817 | 185,909 | - | 371,817 | - | - | - | 371,817 |
| Brownfield Land Release Fund (BLRF) | - | 169,693 | 84,846 | 82,640 | 87,053 | - | - | - | 169,693 |
| Depot Rationalisation | - | 16,711 | 8,356 | - | 16,711 | - | - | - | 16,711 |
| Economy, Regeneration & Sustainability Total | 7,447,801 | 11,439,878 | 6,568,450 | 889,856 | 10,550,011 | (54,675) | (54,675) | - | 11,385,202 |
| Housing Supply (Delivery) Projects | | | | | | | | | |
| Housing Company Loans (excl Barton Park) | - | 9,700,000 | 5,712,154 | 9,700,000 | - | - | - | - | 9,700,000 |
| Affordable Housing Supply | - | 128,000 | 139,308 | - | 128,000 | - | - | - | 128,000 |
| Growth Deal Registered Provider Payments | 272,000 | 272,000 | 136,000 | - | 272,000 | - | - | - | 272,000 |
| Housing Supply Projects Total | 272,000 | 10,100,000 | 6,575,739 | 9,700,000 | 400,000 | - | - | - | 10,100,000 |
| Planning & Regulatory Projects | | | | | | | | | |
| ICT - replacing Uniform (building control and plan | - | 83,931 | 41,965 | - | 83,931 | - | - | - | 83,931 |
| Essential Repairs Grant | 15,000 | 20,000 | 11,043 | 7,030 | 12,970 | - | - | - | 20,000 |
| Disabled Facilities Grants | 1,200,000 | 1,763,767 | 872,412 | 714,137 | 1,049,630 | 0 | 0 | - | 1,763,767 |
| Controlled Parking Zones | - | 443,000 | 235,846 | - | 443,000 | - | - | - | 443,000 |
| Planning & Regulatory Projects Total | 1,215,000 | 2,310,697 | 1,161,266 | 721,167 | 1,589,530 | 0 | 0 | - | 2,310,698 |
| PLACE Directorate Total | 28,105,307 | 46,479,549 | 25,936,573 | 38,701,061 | 32,652,487 | (371,473) | (371,473) | - | 46,108,075 |

| | | | | | | 2025/26 Forecast Variance | | | |
|--------------------------------------------------------|-------------------------|-----------------------|----------------------------|-----------------------------------|--------------------------|---------------------------|--------------------------|--------------------|--------------------------|
| Capital Scheme | 2025/26 Original Budget | Latest 2025/26 Budget | Profiled Budget 30/09/2025 | Spend to 30/09/2025 | 2025/26 Budget Remaining | Forecast Variance | Variance due to Slippage | Over / Under Spend | 2025/26 Outturn Forecast |
| | £ | £ | £ | £ | £ | £ | £ | £ | £ |
| General Fund Capital Programme | | | | | | | | | |
| Corporate Services Directorate | | | | | | | | | |
| Financial Services Projects | | | | | | | | | |
| ICT - Open Revenue Cloud Migration | 100,000 | 41,025 | 22,436 | 120,000 | (78,975) | - | - | - | 41,025 |
| Salary Costs across the Council to be capitalised | 663,000 | 2,234,668 | 1,117,334 | - | 2,234,668 | - | - | - | 2,234,668 |
| ICT - Agresso upgrade and migration to Cloud | - | 175,509 | 96,148 | - | 175,509 | - | - | - | 175,509 |
| OWED Loans | - | 1,025,000 | 551,923 | - | 1,025,000 | - | - | - | 1,025,000 |
| Financial Services Projects Total | 763,000 | 3,476,203 | 1,787,841 | 120,000 | 3,356,203 | - | - | - | 3,476,203 |
| Law & Governance | | | | | | | | | |
| IDOX Eros | 50,000 | 50,000 | 25,000 | - | 50,000 | - | - | - | 50,000 |
| Audio & Visual Equipment | - | - | 492 | - | - | - | - | - | 0 |
| Law & Governance Projects Total | 50,000 | 50,000 | 25,492 | - | 50,000 | - | - | - | 50,000 |
| People | | | | | | | | | |
| ICT - I-trent replacement | 20,000 | 20,000 | 10,000 | - | 20,000 | - | - | - | 20,000 |
| I-trent system improvement | - | 30,000 | 15,000 | - | 30,000 | - | - | - | 30,000 |
| People Projects Total | 20,000 | 50,000 | 25,000 | - | 50,000 | - | - | - | 50,000 |
| Corporate Services Directorate Total | 833,000 | 3,576,203 | 1,838,332 | 120,000 | 3,456,203 | - | - | - | 3,576,203 |
| ODS Client Projects | | | | | | | | | |
| DRS | 50,000 | 37,239 | 25,000 | 9,895 | 27,344 | 3,239 | 3,239 | - | 40,478 |
| MT Vehicles/Plant Replacement Programme | 3,500,000 | 5,584,119 | 2,792,059 | 313,534 | 5,270,585 | (1,744,119) | (1,744,119) | - | 3,840,000 |
| Car Parks Resurfacing | 138,692 | 135,787 | 67,894 | 13,050 | 122,737 | (14,787) | (14,787) | - | 121,000 |
| Cowley Marsh Extension | - | 34,259 | 17,129 | 100 | 34,159 | - | - | - | 34,259 |
| ODS Client Projects Total | 3,688,692 | 5,791,404 | 2,902,082 | 336,579 | 5,454,825 | (1,755,667) | (1,755,667) | - | 4,035,737 |
| General Fund Total | 37,687,856 | 64,733,098 | 35,153,829 | 18,976,858 | 45,756,240 | (1,988,928) | (1,988,928) | - | 62,744,170 |
| Housing Revenue Account (HRA) Capital Programme | | | | | | | | | |
| Tower Blocks | - | - | - | 1,110 | (1,110) | - | - | - | 0 |
| Adaptations for disabled | - | - | - | - | - | - | - | - | 0 |
| Structural | 300,000 | 286,669 | 143,334 | 111,739 | 174,930 | - | - | - | 286,669 |
| Controlled Entry | 660,000 | 752,640 | 376,320 | 7,489 | 745,150 | - | - | - | 752,640 |
| Major Voids | 1,000,000 | 1,000,000 | 500,000 | 1,061,144 | (61,144) | - | - | - | 1,000,000 |
| Compulsory purchase of property | - | - | - | 317 | (317) | - | - | - | 0 |
| Electrics | 1,696,744 | 1,696,744 | 848,372 | 205,899 | 1,490,845 | - | - | - | 1,696,744 |
| Extensions & Major Adaptions | 1,320,000 | 1,457,557 | 728,778 | 821,390 | 636,167 | - | - | - | 1,457,557 |
| Energy Efficiency Initiatives | 6,145,000 | 3,631,669 | 2,111,500 | 732,026 | 2,899,643 | - | - | - | 3,631,669 |
| Lift Replacement Programme | 190,000 | 116,000 | 153,492 | 67,379 | 48,621 | - | - | - | 116,000 |
| Fire doors | 968,500 | 796,615 | 398,307 | 357,514 | 439,101 | - | - | - | 796,615 |
| Renewal Of Fire Alarm Panels | 90,000 | 297,021 | 148,511 | 708 | 296,313 | - | - | - | 297,021 |
| HRA Stock Condition Survey | 120,000 | 607,501 | 303,751 | 12,905 | 594,596 | - | - | - | 607,501 |
| Southfield Park Leases | - | 1,500,000 | 750,000 | - | 1,500,000 | - | - | - | 1,500,000 |
| Oxford North Development | 13,922,141 | 13,320,006 | 6,660,003 | 1,782,799 | 11,537,207 | - | - | - | 13,320,006 |
| LAHF 2 Acquisitions | - | 179,643 | 89,822 | 17 | 179,626 | - | - | - | 179,643 |
| Retained Right to Buy Receipts (Acquisitions) | 3,000,000 | 3,439,660 | 1,719,830 | 1,377,162 | 2,062,497 | - | - | - | 3,439,660 |
| Retained Right to Buy Receipts (Additional) | - | - | - | 44,018 | (44,018) | - | - | - | 0 |
| Digital Noticeboards for tower blocks | - | - | - | 17,497 | (17,497) | 35,000 | 35,000 | - | 35,000 |
| Communal Capital investment works to Council H | 3,335,015 | 3,335,015 | 1,667,508 | 441,888 | 2,893,127 | - | - | - | 3,335,015 |
| External Capital investment works to Council Hom | 10,389,637 | 10,389,637 | 5,194,819 | 1,697,025 | 8,692,612 | - | - | - | 10,389,637 |
| Internal Capital investment works to Council Hom | 8,503,914 | 8,503,914 | 4,251,957 | 3,122,404 | 5,381,510 | - | - | - | 8,503,914 |
| Tower Blocks - Fire Alarm System Replacement | 6,300,000 | 6,561,496 | 3,280,748 | 48,719 | 6,512,777 | - | - | - | 6,561,496 |
| Leiden Road (c. 12 affordable homes) | 324,213 | 330,463 | 165,232 | - | 330,463 | - | - | - | 330,463 |
| Underhill Circus (c. 11 affordable homes) | 264,538 | 275,788 | 137,894 | 820 | 274,968 | - | - | - | 275,788 |
| Additional Units (RRTBR) | - | - | - | - | - | - | - | - | 0 |
| Additional Programme (RRTBRs) | - | - | - | - | - | - | - | - | 0 |
| LAHF 3 Acquisitions | 261,625 | 998,234 | 499,117 | 89,940 | 908,294 | - | - | - | 998,234 |
| HRA Barton Acquisitions | 14,002,979 | 14,314,599 | 8,306,614 | 217 | 14,314,382 | - | - | - | 14,314,599 |
| Windale & Northbrook Decant Costc | 481,000 | 481,000 | 240,500 | 233,133 | 247,867 | - | - | - | 481,000 |
| Major Refurbishment Masons Road | - | 589,615 | 294,807 | 3,600 | 586,015 | - | - | - | 589,615 |
| East Oxford development | 1,910,128 | 2,719,249 | 1,359,625 | 2,025,416 | 693,833 | - | - | - | 2,719,249 |
| Properties Purchased From OCHL | 49,176,171 | 32,059,098 | 25,763,446 | 15,465,522 | 16,593,576 | - | - | - | 32,059,098 |
| Northfield Hostel | 15,581,280 | 7,338,141 | 4,624,149 | 1,336,473 | 6,001,668 | - | - | - | 7,338,141 |
| Lanham Way | 191,248 | 510,275 | 255,138 | 5,066 | 505,210 | - | - | - | 510,275 |
| SHAP Acquisitions | - | - | - | 295 | (295) | - | - | - | 0 |
| Blackbird Leys Regeneration (HRA) | 1,142,000 | 678,000 | 400,833 | 671,545 | 6,455 | 2,000 | 2,000 | - | 680,000 |
| Housing Revenue Account Total | 141,326,133 | 118,166,248 | 71,374,404 | 31,743,176 | 86,423,072 | 37,000 | 37,000 | - | 118,203,248 |
| Grand Total | 179,013,989 | 182,899,346 | 106,528,233 | 50,720,034 | 132,179,312 | (1,951,928) | (1,951,928) | - | 180,947,418 |
| | | | | % Latest Budget % Original Budget | | | | | |
| GF Spend v Budget | | | | 29% | | 50% | | | |
| HRA Spend v Budget | | | | 27% | | 22% | | | |
| Total Spend v Budget | | | | 28% | | 28% | | | |

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To: Cabinet

Date: 10 December 2025

Item No:

Report of: Group Finance Director

Title of Report: Medium Term Financial Strategy 2027-28 to 2029-30 and 2026-27 Budget for Consultation.

Summary and Recommendations

Purpose of report: To propose a Medium-Term Financial Strategy and the 2026/27 Budget for consultation

Key decision Yes

Executive lead member: Councillor Ed Turner

Policy Framework: The Council's Corporate Strategy and Council's Budget

Recommendation(s): That Cabinet resolves to:

1) Approve the 2026-27 General Fund and Housing Revenue Account budgets for consultation and the General Fund and Housing Revenue Account Medium Term Financial Strategy as set out in Appendices 1-10, noting:

a) The Council's General Fund Budget Requirement of £30.945 million for 2026/27 and an increase in the Band D Council Tax of 2.99% or £10.67 per annum representing a Band D Council Tax of £367.38 per annum assuming it is confirmed that the authority is able to do so.

b) The Housing Revenue Account budget for 2026/27 of £68.2 million and an increase of 4.8% .(average of £8.47 per week) in social dwelling rents from 1 April 2026 (see paragraphs 90-92) giving a revised weekly average social rent of £143.40 as set out in Appendix 5.

c) The increase in shared ownership rental in accordance with the lease as shown in paragraph 93-94

d) The General Fund and Housing Revenue Account Capital Programme as shown in Appendix 6.

2) Agree the fees and charges shown in Appendix 7

- 3) Delegate 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 29-30 of the report.

Appendices to the report

- Appendix 1 Summary of General Fund Budget by Service 2026-27 to 2029-30
- Appendix 2 General Fund Revenue Budget by Service 2026-27 to 2029-30
- Appendix 3 Detailed General Fund and HRA Service Budgets 2026-27 to 2029-30
- Appendix 4 Housing Revenue Account Budget 2026-27 to 2029-30
- Appendix 5 Council House Rents By Estate
- Appendix 6 General Fund and HRA Capital Programme 2026-27 to 2029-30
- Appendix 7 Fees and charges
- Appendix 8 Risk Register
- Appendix 9 Equalities Impact Assessment
- Appendix 10 – Properties purchased from OXPlace – EXEMPT FROM PUBLICATION

Comment from the Portfolio holder

It is both a challenging and uncertain time for local authorities, including Oxford City Council. We face substantial pressures on services, in line with previous budgets but with Oxford's housing crisis, in particular, adding huge pressure. The government has announced it will reorganise local government, and there are three competing proposals for Oxfordshire. In addition, long-delayed reforms to local government finance are to be introduced from next year, and we await details of how these will affect Oxford City Council.

In proposing this consultation budget, we recognise these circumstances, while nonetheless trying to improve services, and continuing to prioritise areas about which we care greatly, such as building new, genuinely affordable housing, narrowing the gap between rich and poor and supporting community organisations. Amongst the important features of this budget are:

- *Funding for 1,692 new council homes delivered directly or through our wholly owned housing company OxPlace*
- *Continued support for the "Oxford Model", which is projected to deliver over £12 million in dividends from wholly-owned companies*
- *Backing for the Oxford Living Wage for staff and contractors*
- *Improvement in services, including longer opening of Hinksey Pool, recruitment of new community response officers to improve safety and tackle anti-social behaviour, and reintroduction of a creche at Blackbird Leys Pool and funding for cricket nets on Blackbird Leys.*
- *Provision of £1 million to renew the roof of Oxford Ice Rink.*
- *Mobilisation of government funding for Cowley Branch Line and use of funds from development to ensure the process is properly managed.*
- *Continuation of full council tax reduction for those on the lowest incomes.*

There are other areas in which we would like to invest, but we will await publication of the funding settlement and address those once we know our position for next year.

We face a major challenge in the provision of temporary accommodation for homeless households. As a result, we are setting aside £32 million to help purchase 260 properties which can help those who become homeless, and reduce the need to use costly, unsuitable hotels accommodation.

As ever, producing a budget involves difficult choices. Under our proposals, council tax and some other charges will go up by a modest amount, so that we do not have to lose some of our most important amenities, such as community and leisure centres, as is happening in other parts of the country. We also propose selling some council property, and invite views on whether we should sell the Lord Mayor's number plate, so that this money can be reinvested in services. We will welcome feedback from members of the public as part of our budget consultation.

INTRODUCTION

1. This report sets out the Council's Medium Term Financial Strategy (MTFS) and associated spending plans for the four years 2026/27 to 2029/30 and gives interested parties the opportunity to comment and be consulted on the Council's budget proposals for the financial year (2026/27). The report covers all aspects of the Council's spend: General Fund revenue expenditure funded by the council taxpayer, government grant and other sources of income, Housing Revenue Account (HRA) expenditure, funded by council tenants' rents, and the Council's Capital Programmes (General Fund and HRA) funded by capital receipts, revenue and borrowing.
2. The proposed Medium Term Financial Strategy:
 - a) Is financially balanced over the four-year period with the use of a net £8 million of reserves.
 - b) Assumes a council tax increase of 2.99% for 2026-27 and thereafter.
 - c) Assumes dividends from our wholly owned companies over the four-year period of around £12.6 million.
 - d) Assumes an increase in council house rents of 4.8% in 2026-27 to an average of £143.40 per week.
 - e) Assumes 1,200 new build dwellings by the council's wholly owned Housing development company OXPlace of dwellings over the life of the 8-year development programme, in addition to 100 acquisitions by the HRA.
 - f) Facilitates capital investment of £725 million over the next four-year period.
3. For ease of reading, the report is split into four sections:

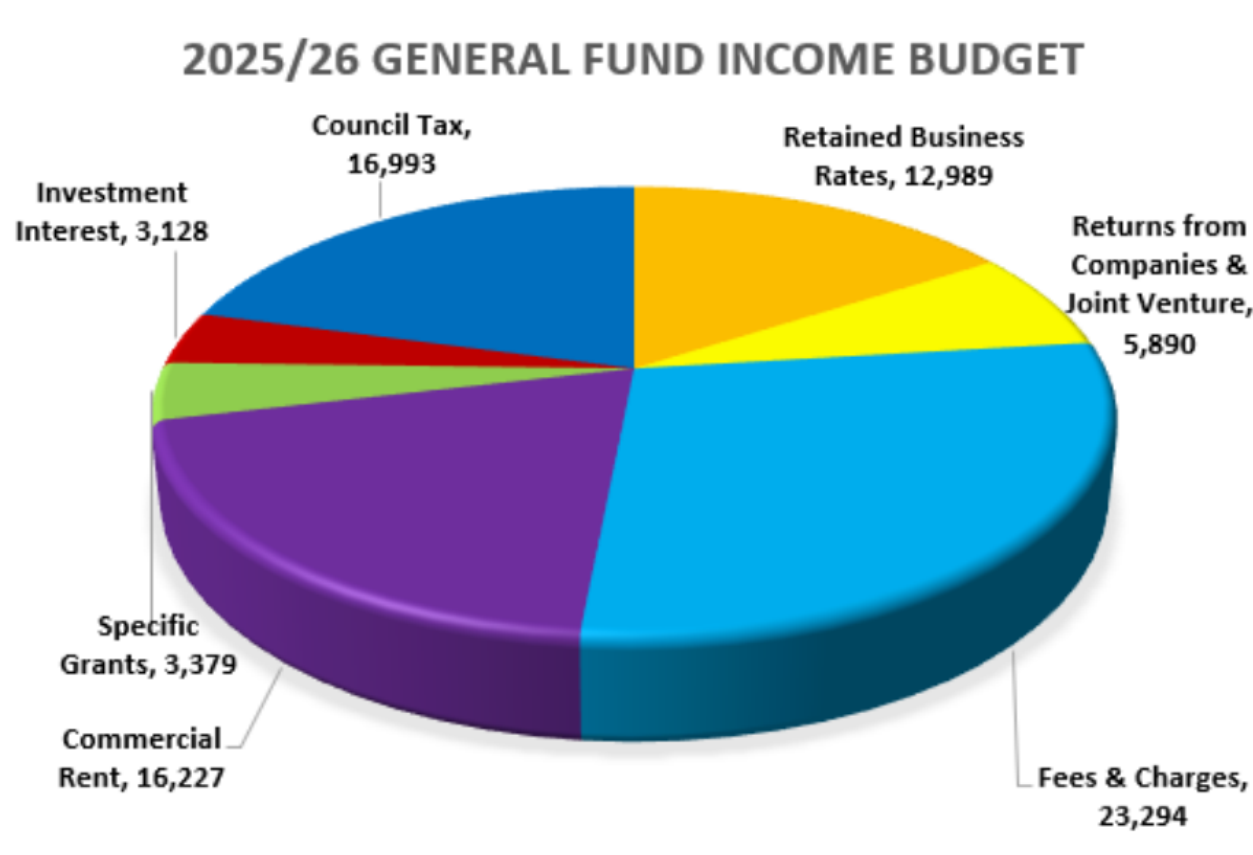
Section A Economic context, our priorities and budget setting strategy
Section B General Fund Revenue Budget
Section C Housing Revenue Account (HRA) Budget
Section D Capital Programme

Section A - Background and Context

Background

4. This report sets out the Council's financial plans for the period 2026/27 to 2029/30. The plans make assumptions about income from Government grants, Council Tax and rents. The plans underpin service provision and the Council's vision of "Building a World Class City for Everyone".
5. The English Devolution White Paper (published on 16th December 2024) set out the government's vision for simpler local government structures. On the 5th February 2025 the Government issued a statutory invitation to all councils in two tier areas and small neighbouring unitary authorities to develop proposals for unitary local government. These proposals bring together lower and upper tier local government services into new unitary councils to deliver Local Government Reorganisation.
6. The timeline Government have set out for the reorganisation is
 - a. Submission of unitary proposals – 28th November 2025
 - b. Consultation on options – Spring 2026
 - c. Decision on proposals by Government – July 2026
 - d. Elections to Shadow authorities May 2027
 - e. 1-4-2028 – vesting day of new councils and dissolving of predecessor councils
7. The Council has no way of knowing the future direction of the authority until Summer 2026. As such Oxford City Council has been assumed to be a going concern for the foreseeable future and no financial implications of establishing or operating in a new unitary set up have been included within the MTFP. However, in order to get a 'head start' on preparations for unitary status an amount of £2million has been included in the MTFP in 2026-27 to cover the costs of project management and consultancy.
8. The Council operates the 'Oxford Model' which seeks to support and maintain services from income streams driven from fees and charges, income from our assets and financial returns from our wholly owned companies. A breakdown of gross income of around £82 million from various sources is shown graphically below.

Picture 1 : General Fund Revenue Income 2025-26

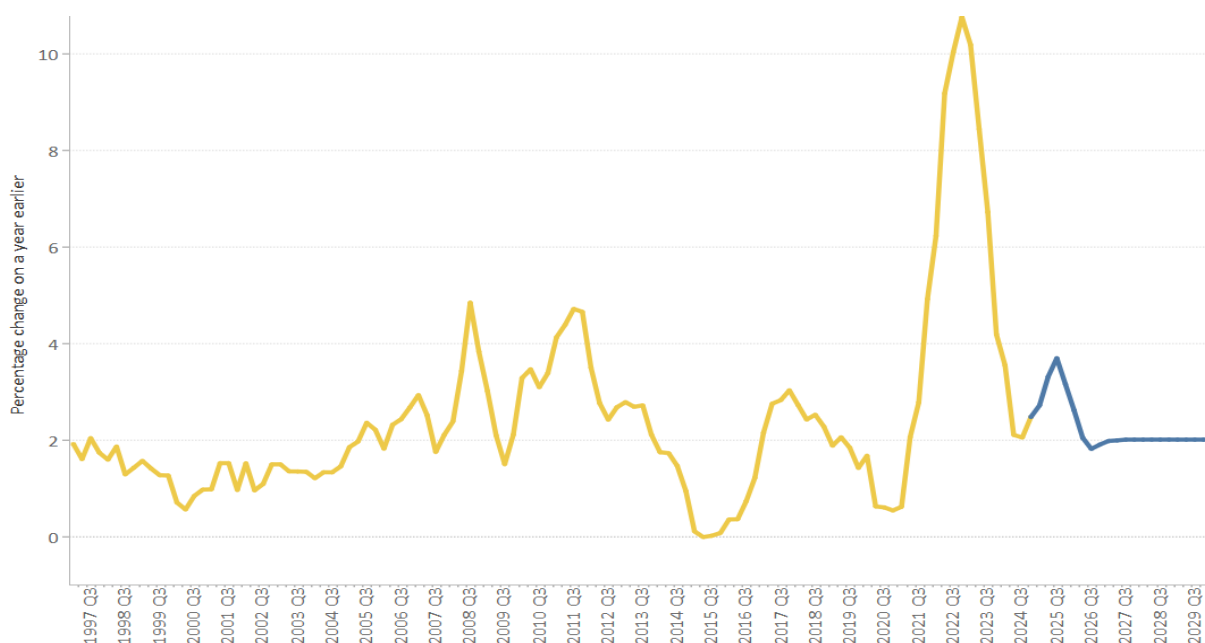


- 9 Over half of our financial resources are derived from sources generated by the Council, with 7% being delivered by the Council's wholly owned companies OXPlace and ODS. This level of income maximisation requires a commensurate level of staff, providing technical knowledge and professionalism without which the council would need to make unprecedented cuts in its services.

Inflation

10. Consumer Price Index (CPI) inflation has remained unchanged for September from the previous two months at 3.8% which is below analysts' expectation of 4%. The Bank of England expects September's figure to be the peak and for inflation to slow down through the rest of 2025 and 2026. There is still an expectation that inflation reduces to the Bank of England's 2% target from 2026 onwards as shown in the chart below. Budgets for most supplies and services the council purchases are cash limited and therefore any increase in inflation represents real terms cut for service managers.

Picture 2: Inflation Forecasts -Office for budget Responsibility



Interest Rate Forecasts

11. On the 6th November 2025 the Bank of England maintained base rates at 4.00%, where it has been since the last reduction in August. MUFG Investor Services and Capital Economics, two of the leading advisors on Treasury related matters, have given their view on interest rate forecasts as shown below:

Table 1: Interest rate forecasts from December 2025 to September 2027

| Interest Rate Forecasts | | | | | | | | |
|-------------------------|--------|--------|--------|--------|--------|--------|--------|--------|
| Bank Rate | Dec-25 | Mar-26 | Jun-26 | Sep-26 | Dec-26 | Mar-27 | Jun-27 | Sep-27 |
| MUFG CM | 4.00% | 3.75% | 3.75% | 3.50% | 3.50% | 3.50% | 3.50% | 3.25% |
| Cap Econ | 4.00% | 3.75% | 3.50% | 3.25% | 3.00% | 3.00% | 3.00% | 3.00% |

12. Whilst the hold in base rates has been welcome news the Bank of England Governor warned 'we're not out of the woods yet'. Analysts had not expected interest rates to be cut given that prices are rising at nearly twice the banks target rate, but the Bank did say that it expected inflation to return to its key target of 2%.
13. The council holds £288 million of external debt all in respect of HRA self-financing taken out in April 2012. The Council capital programme is heavily financed by borrowing although the Council currently uses internal funds, as these are the cheapest form of borrowing. As the Capital Financing Requirement (the underlying need to borrow to fund the capital programme) increases so will the need to undertake external borrowing.

Autumn Budget and Spending Review 2025

14. In the period June 2025 to August 2025 the Government ran a number of consultations on

- **Fairer Funding 2.0.** The consultation sought views on the approach to determining new funding allocations for local authorities with specific reference to a number of areas including:
 - Determining local authority funding allocations
 - Measuring differences in demand for services and the cost of delivering them
 - Measuring differences in local available resources
 - New Homes Bonus
 - Transitional arrangement and keeping allocations up to date
 - The long-term approach to the business rates retention system

There was no mention of the business rates reset which will determine new tariff and top up values to match locally collectable business rates to baselines.

A key element of the consultation included the Government's intention to the rolling in further grants such as nearly £10 billion of social care funding into the Settlement Funding Assessment (Relative Needs – relative resources = SFA) in effect subjecting them to the Fairer Funding process, whereas currently such grants are in the main allocated to unitaries and County Councils

- **Homelessness prevention grant (HPG)-** In June 2025 the Government launched a consultation on the funding arrangement for **HPG** from 2026-27 onwards. HPG is currently allocated to local authorities based on relative homeless demand and cost pressures. The authority's current HPG grant for 2025-26 is £2.131 million. Under the proposals 45% of this funding will be for temporary accommodation (to be combined with RSG) and 55% on prevention and relief to support local authorities to shift funding towards prevention. There will be protection for 1-5 years which will only allow allocations to go down by 2-20% over the 5 year period.
- **Rough sleeping prevention and recovery grant.** The original grant allocation for the authority for 2025-26 was £2.1 million as part of total allocation of £185 million. In October 2025 the government announced a further allocation of £69 million of which Oxford's share was £0.970 million.
- **Business rates retention –**
 - The Government confirmed their intention to undertake a reset of the Business Rates Baselines with effect from 1-4-2026.
 - All growth above baselines to date will be reset and growth that comes on stream after reset will be retained for the duration of the reset i.e. 3 years.
 - Alongside the 2026 reset there will be a business rates revaluation reflecting changes in the property market resulting in decreases or increases in ratepayer bills. The last revaluation was undertaken in 2023.

- There will be a transitional protection for the Business rates reset and the impact at individual local authority level
- New lower multipliers for hereditaments used for retail hospitality and leisure and a higher multiplier for hereditaments with rateable values over £500k

15 The Chancellor's Autumn Statement was pushed back to **26th November 2025** although on the **22nd November** there was also a Policy Statement. The announcement sets out the medium-term path for public finances and for the first time in decades will return to multi-year funding settlements which will reportedly cover the period 1-4-2026 to 31-3-2029. The Provisional Finance Settlement is thought to be due on **18th December 2025**. Key features of the November Budget which may impact the authority included :

- The introduction of a mansion council tax in 2028 for properties over £2 million ranging between £2,500 and £7,500 per annum. Although the money will be collected by the local authority it will be paid over to Government
- £18 million for around 200 new playgrounds across the UK
- Increase in the national living wage by 4.1% to £12.71 per hour. National minimum wage for 18-20 year olds will increase by 8.5% (£10.85) per hour and for 16-17 year olds and apprentices by 6% to £8.00 per hour
- Lower business rates for properties in the Retail Hospitality and Leisure sector funded by additional business rates with a rateable value of over £500k
- £48 million new funding to boost capacity in the planning system, which includes additional investment to recruit an extra 350 planners
- A consultation on tackling a business rates tax loophole associated with short term lets
- £100 million fund for local authorities and public bodies to accelerate installation of charging points where people live and work

16 Whilst the individual authority allocations from the Fairer Funding will not be known until the Provisional Finance Settlement in December 2025, for budget setting purposes the assumptions have been made in the MTFP are set out below.

17 The current assumption for Oxford City Council budgeting purposes excludes social care and other county council grants from the redistribution and no transitional protection for the reduction in retained business rates as a result of the Business Rates Reset. The results which have been factored into the MTFP compared to a more optimistic assessment of the impact is shown below:

Table 2 : MTFP Fairer Funding Impact

| | | | | 2026/27 | 2027/28 | 2028/29 | 2029/30 |
|-------------------------|-----------------------|--|--|----------|----------|----------|----------|
| CORE SPENDING POWER | | | | £000's | £000's | £000's | £000's |
| Included in MTFP | | | | | | | |
| | Business Rates | | | (10,590) | (10,922) | (9,530) | (10,394) |
| | Revenue Support Grant | | | (3,665) | (3,560) | (3,704) | (3,704) |
| | Council Tax | | | (17,690) | (18,412) | (19,162) | (19,943) |
| | | | | | | | |
| | Total | | | (31,945) | (32,894) | (32,396) | (34,041) |
| | | | | | | | |
| | Optimistic assessment | | | (34,255) | (35,654) | (36,517) | (37,608) |
| | | | | | | | |
| | Variation | | | (2,310) | (2,760) | (4,121) | (3,567) |
| | | | | | | | |

- 18 The difference between the realistic scenario and optimistic scenario over the 4 year MTFP is an estimated £12 million improvement over the 4 year period. There are downside and upside risk to this strategy although clearly there will be no clarity on this until the finance settlement figures are announced for individual authorities.
- 19 **Packaging Extended Producer Responsibility (pEPR) and simpler recycling** In November 2024 the Government issued a policy statement entitled 'Simpler Recycling in England' in relation to recycling and bin collections in England, setting out the Governments policy to making recycling in England easier. Simpler recycling would enable more streamlined collections from households, businesses and non-domestic premises such as schools.
- 20 The new default for recyclable material collections for most households and work places will be 4 containers for :
- Non-recyclable waste
 - Food waste
 - Paper and card – councils can continue to collect this alongside other recyclates, if an assessment is completed that it is not technically, economically or environmentally practicable to do so otherwise
 - All other dry recyclables (metal, plastics and glass)
- 21 Simpler recycling will sit alongside 'packaging extended producer responsibilities' and will seek to drive up recycling rates across England. Timelines for this are as follows:
- by 31 March 2025, businesses and relevant non-domestic premises in England will need to arrange for the collection of the core recyclable waste streams, with the exception of garden waste (glass, metal, plastic, paper and card, and food waste)
 - by 31 March 2026, local authorities will be required to collect the core recyclable waste streams from all households in England. This includes introducing weekly food waste collections for most homes

- c. by 31 March 2027, kerbside plastic film collections from businesses and relevant non-domestic premises, and households will be introduced
- 22 Defra, via the scheme administrator PackUK, is providing Oxford City Council with a total pEPR £1.985 million for management of its household packaging and waste and recycling for 2025-26, in 3 payments from December 2025. Year 2 indicative funding is assessed to be £2.031 million for the authority, to cover the period April 2026 to March 2027. PackUK will shift the cost of managing household packaging waste from taxpayers and local authorities to those businesses who use and supply the packaging, applying the 'polluter pays' principle.
- 23 Through its wholly owned company Oxford Direct Services, the council undertakes domestic and recycling services much of which is in line with the Simpler Recycling government policy. An action plan is being drawn up to ensure that the pEPR funding received, supports key workstreams that deliver efficient, effective and improved household waste management and recycling, fully aligning with the spend conditions.

Pride in Place Strategy

- 24 In September 2025 the Government announced their 'Pride In Place Strategy', aimed at working more in partnership with communities and neighbourhoods, empowering them with the tools and levers to drive meaningful change that effect their priorities. The government's £5 billion programme is aimed at delivering up to £20 million funding and support over the next 10 years into 250 places from across the UK.
- 25 Where the funding will be spent sits with a Neighbourhood Board, led by an independent chair that includes residents, local businesses, civil society and community organisations working in partnership with their respective authority.
- 26 Greater Leys has been identified as part of the programme to receive funds with the funding timelines being:
- **Winter 2025/26** Neighbourhood Boards and local authorities receive a tailored data pack detailing
 - **Spring 2026** MHCLG issues 2026 to 2027 capacity and capital funding payment to all places
 - **Summer 2026** Neighbourhood Boards to confirm finalised membership and boundary proposals
 - **Winter 2026/27** Neighbourhood Boards submit their Regeneration Plan to MHCLG for assessment and approval
 - **Spring 2027** MHCLG approve regeneration plans. First substantive delivery funding payment to be made to local authorities, commencement of delivery phase
- 27 The funding which is likely to be held by the Council as accountable body will include circa 37% revenue support for managing and delivering projects although further information is still awaited on the publication of the prospectus. Cabinet approval will be required at the appropriate time to secure funding approvals.

Corporate Priorities

28 As in previous years the Cabinet will set a consultation budget in December with a view to presenting a final budget taking account of the results of this consultation to Cabinet and Council in February 2026 in line with its key corporate priorities approved at Cabinet in July 2024 which remain unchanged:

- a) **Enable an inclusive economy**, key deliverables include:
 - The Council's staff are skilled and confident in delivering services our residents 'need and the workforce as a whole better reflects Oxford's diverse population.
 - The Council's supply chain supports more local businesses, including social enterprises and cooperatives, promoting wider benefits to the local economy.
 - The Council delivers inclusive economic growth by supporting the delivery of new jobs and infrastructure.
- b) **Deliver more, affordable housing**, key deliverables include:
 - The Council has increased the supply of high quality, energy efficient housing with a balanced mix of homes for sale and to rent at different price points.
 - The Council's Blackbird Leys regeneration delivers high quality homes and a better use of space.
 - More Council and private sector tenants are supported to stay in their homes where they face the prospect of eviction.
- c) **Support thriving communities**, key deliverables include:
 - The Council's services, grants, community and leisure facilities, parks and cultural events have helped reduce inequality, increase cohesion and improve health and wellbeing across Oxford's communities.
 - Children and young people's resilience and confidence is increased through the educational and recreational activities the Council offers.
 - The Council's public spaces remain clean, safe, well maintained and are more accessible.
- d) **Pursue a zero carbon Oxford**, key deliverables include:
 - The City Council making significant progress on the journey to reduce its own carbon footprint to zero.
 - All new building by the Council progressing towards near or net-zero carbon standards.
 - The Council's existing council housing is being made more energy efficient.
- e) **Well Run Council** key deliverables include
 - Deliver modern accessible services for our diverse communities.
 - Ensure financial resilience so we can continue a wide range of services.
 - Ensure high levels of cybersecurity.

29 The budget re-set strategy has been undertaken by:

- a) Preparing budget as if OCC is an ongoing entity i.e. projecting budgets beyond the expected life of OCC assuming LGR goes ahead as planned
- b) Minimal additional savings on services
- c) Take efficiencies where it is appropriate to do so
- d) Services to 'consume their own smoke and limit new expenditure
- e) Limit new capital expenditure unless statutory or legal obligation
- f) Use of reserves – but one off in nature and these cannot be exhausted or be 'inadequate' in the eyes of the Section 151 Officer.

30 Taking account of this strategy, the key assumptions are outlined below.

Section B General Fund Revenue Budget

31 Appendix 1 and appendix 2 give details by service and directorate of the budgets for General Fund Services over the 4 year Medium Term Financial Plan. Other Key General Fund assumptions are discussed in more detail below.

Key General Fund Assumptions

Retained Business Rates

32 Business rates income collected by Oxford City Council as billing authority is split 50/50 with central government with the billing authority's 50% share split 80/20 between Oxford City Council and Oxfordshire County Council respectively. From its 80% share the Council pays a tariff to central government and retains a baseline amount (set by the Government) together with 50% of the retained income above this baseline. This 50% above baseline will be re-set to zero with effect from 1-4-2026 and the figures below represent our best assumption of how much business rates will retain from this date.

| Table 3 : Retained Business Rates 2026-27 | |
|--------------------------------------------------|-----------------|
| | £million |
| Estimated Business Rates Income | 114.153 |
| Billing Authority Share (50%) | 57.076 |
| Oxford City Share (80%) | 45.661 |
| Less Tariff paid to Government | 30.467 |
| Amount remaining after tariff (A) | 15.194 |
| Baseline Business Rates | 7.687 |
| Income above baseline (£15.194- 7.687) | 7.507 |
| Levy -50% of income above baseline (B) | (3.753) |
| Total retained business rate income (A+B) | 11.441 |

Notes:

Baseline Business Rates – The Government's view of a fair starting point of business rates income for the billing authority based on formula grant distribution. Updated by RPI each year.

Tariff – The amount paid to the Government each year by the Council as billing authority. Updated by the retail prices index (RPI) each year.

Oxfordshire Business Rates Pool Arrangements

33. For 2026-27 the West Oxfordshire Business Rates Pool consisting of Oxfordshire County Council (OCC), Cherwell District Council (CDC) and West Oxfordshire District Council (WODC) is planned to be formed. Notification to form the pool is required to be

made to Government on or before in advance of the 25th November. This does not preclude authorities expressing their intention to form a pool to pull out if it is not financially advantageous to do so which will only be known in December.

34. Oxford City Council is not part of the current Business Rates Pool as the Council's inclusion has not to date optimised the financial return to Pool members given the interaction of levy payments to Government. In order that the Council itself is not financially disadvantaged it is part of a Business Rates Distribution Group (the Group) with South Oxfordshire District Council and Vale of White Horse Council's, which receives a distribution of growth achieved from the Pool in exchange for taking some of the risk for business rates losses. This risk is deemed acceptable by the Council's Chief Financial Officer given the potential one-off return to the Council. In the past the Council have earned around £1 million of income from the Distribution Group although with the business rates reset taking place from 1st April 2026 it is unlikely that this will be the case in 2026-27. Depending on the outcome of the changes in respect of business rates reset the Council will join the Business Rates Distribution Group if it is financially advantageous to do so.

Modernization and Improving the Administration of Council Tax

35. On 20th June the Government issued a consultation on the above. The consultation closed on 12 September 2025.
36. The consultation sought views on
- Changing the ways council tax is billed, collected and enforced
 - Modernising the support available in the system
 - Supporting councils to improve efficiency
37. One of the key lines of consultation is changing the council tax billing from 10 months to 12 months by default. Currently the default is for taxpayers to pay over 10 months April to January although taxpayers have the right to request to pay their council tax bills over 12 months. Many of our customers who pay by direct debit are already paying over 12 instalments and therefore the cost to the authority is not anticipated to be large.

New Homes Bonus (NHB)

38. There will be no New Homes Bonus from 1-4-2026 onwards. In 2025-26 the council received approximately £31k.

Corporate Planning Assumptions

39. **Council Tax Increase** – For the past two years the maximum Council Tax increase without a referendum has been 2.99% or £5, whichever is the higher, for District Councils. Subject to confirmation in the Finance Settlement this level is assumed to continue through the duration of the MTFP. Each 1% increase represents around £171k of additional annual income.
40. **Tax Base** – The tax base is estimated at 49,096 although this may be subject to change when it is set at Audit and Governance Committee in January 2026.

41. Interest rate assumptions – Based on the Bank of England Interest rates shown on Table 3 paragraph 9 the following interest assumptions have been made:

- Investment interest rates – 3.6% – 3.25%
- Borrowing rates – 4.5% – 4.45%

Internal borrowing is used in favour of external borrowing and there is currently no General Fund external borrowing although the Capital Financial Requirement at the 1-4-2026 is £98.5 million including leases of around £26 million rising to £125 million in 2029/30.

42. Externally Managed Property Investments – The Council held £10 million invested in two funds for £3 million and £7 million respectively. Whilst the £3 million fund remains in its entirety the council is withdrawing its funds from the larger of the two. This is a gradual process requiring the fund manager to sell assets in order to fund withdrawals although the council should have fully exited this fund by 2025-26. The Council continues to make returns of around 3.5% although capital values are still depressed.

43. Ray Valley Solar Farm – The Council holds loans to Ray Valley Solar Farm of £4 million.

44. Multi Asset Funds – The Council has appointed two fund managers, Artemis and Fidelity, to manage £5 million each of the Council's investments. The funds consist of a diverse range of investments including stocks shares and cash. Whilst financial returns continue to run at around 3-4% the principal value of the fund have been trading below par, albeit they are now showing signs of recovery. These funds are long term holdings in nature and the position is being monitored.

45. OxWed Development – The Council has outstanding loans and accrued interest of approximately £21 million in a 50/50 Limited Liability Partnership (LLP) with Nuffield College. Loan rates are 4% above base. Since the LLP has yet to make a surplus, this interest is accrued rather than paid. As at 31st March 2025 the total of accrued interest will be approximately £5 million. The LLP is in the process of applying for planning permission to develop the site and subject to this, will then look to secure a development partner, or partners. At this point the Council's investment and accrued interest will be paid together with a proportion of the profits from the sale. The value and timing of profits at this point are uncertain although suitable budget assumptions have been made within the MTFS.

46. Housing Company – The Council provides subsidy control compliant loans to its wholly owned company Oxford City Housing Ltd (which trades as OxPlace) and makes a return above that which it borrows from PWLB. The marginal return is currently 3.20% for development company loans. In 2024/25 Council agreed to purchase all properties held within OCH(I)L and transfer them to its housing revenue account. All loans within the company have now been repaid to the Council and no further loans are assumed to be advanced to OCH(I)L. In addition to interest returns the company makes dividend returns to the council which are estimated at around £3 million in 2027-28 after which none further are forecast. The company have recently employed consultants to look at the future of the company and together with changes to the procurement of schemes in the back end of the development programme it is anticipated that going forward the company can still continue to meet its key objectives of delivering new housing and dividends back to the shareholder

47. **Inflation** –Most budgets are cash limited. The most significant impact is on materials purchased by Oxford Direct Services in respect of repairs and maintenance and the council's capital programme, for which some budgetary provision has been made.
48. **Pay Assumptions** – The two year pay deal agreed by the Council and unions in 2022 expires on 1st April 2026. For 2025-26 pay increases were agreed at 3% following 6.5% agreed for 2024-25. Inflationary increases have been assumed for the later years of the MTFS and discussions are currently underway with the unions to agree the uplift from 1-4-2026.
49. **Capital Financing** - Capital financing for the draft Capital Programme is detailed in Section D. Given the budgetary pressures experienced from the Council no revenue contributions have been assumed to finance capital which is largely funded by borrowing, the revenue implications of which have been included within the MTFS.
50. **Neighbourhood Community Infrastructure Levy (NCIL)** - In line with CIL regulations 15% of CIL received in unparished areas of the city, which do not have an adopted neighbourhood plan, are retained by the city council for allocation. This money is for the provision, improvement, replacement, operation or maintenance of infrastructure; or anything else that is concerned with addressing the demands that development places on an area. The City Council plans to use £200K of this NCIL to fund voluntary sector grants and £80k ward member budgets, which are of benefit to neighbourhoods throughout the City.

Efficiencies

51. Additional Efficiencies totalling £2.1 million are estimated from 2029-30 as shown in Appendix 3. There are several new efficiencies identified including:

Ongoing efficiencies

- a) **Savings in in-house ICT** support arising from movement to cloud based technology -£287k per annum
- b) **Lower Azure** based storage costs - £50k per annum
- c) Reduced replacement of **mobile phones** - £50k per annum
- d) **Customer Experience Programme savings** – £200k per annum- savings from the use of AI, robotic process automation, implementation of web forms
- e) **Town Hall** – £25k per annum -review of delivery costs from 2028-29 onwards
- f) **Rationalization of incomes team** - £50k per annum- following a member of staff leaving the service an opportunity has been taken to rationalise the service
- g) **Council tax reduction scheme CTRS**. In 2024-25 the Council made changes to its CTRS scheme to address anomalies in the treatment of universal credit income considered in the calculation of the Council Tax reduction. To ease the burden at the same times the council changed the income bandings used for the calculation of the discount on the proviso that increased the bandings in future years. Banding changes as indicated below are estimated to produce another £510k per annum of council tax income with the City Council's estimated increase being approximately £75k per annum.

Table 4 : Impact of Council Tax Reduction changes

| CTR discount bands 25-26 | | | CTR discount bands 26-27 (£75K savings) | | | Changes in each band |
|--------------------------|-------------------|--------|-----------------------------------------|-------------------|--------|----------------------|
| Discount | Income band | Number | Discount | Income band | Number | Number |
| 0 | >£700.00 | 0 | 0 | >£660.00 | 132 | 132 |
| 0.25 | £650.01 - £700.00 | 172 | 0.25 | £580.01 - £660.00 | 479 | 307 |
| 0.5 | £575.01 - £650.00 | 474 | 0.5 | £530.01 - £580.00 | 354 | -120 |
| 0.75 | £500.01 - £575.00 | 558 | 0.75 | £480.00 - £530.00 | 429 | -129 |
| 100 | <£500.00 | 4751 | 1 | <£480.00 | 4561 | -190 |

h) **Reduction in international links post - £50k per annum**

Income

52. Income over the 4 year period is set to increase by another £8 million, over the current base budget and primarily includes:

- a) **Car parking – £900k increased income**– In 2024 car parking revenue was around £1.4 million over the budgeted amount of £8.3 m with particular variances in Worcester Street car park, Opens, Peartree and Redbridge parks and rides. Whilst the recently introduced congestion charge and the awaited traffic filters will have some impact on the income a £900k increase is considered appropriate since the income to date in the current financial year is already tracking £500k over the budget. Overall income will decrease when Oxpens car park closes. In addition there is £128k arising from increased charge proposals.
- b) **Corporate Property - £5.2 million additional income over the 4 year period** – The baseline budgeted commercial rent income figure is currently estimated at around £13.5 million per annum for 2025-26. Income for the period 2025-26 to 2028-29 is forecast to increase by £5.2 million with increased income streams from The Store, 6-8 Broad Street, Floyds Row and the full year effect of the redeveloped Odeon. Alongside of this capital receipts will arise from the disposal of South Oxfordshire Science Village (SOSV), Carfax café, HSBC bank and also around £300k of artefacts owned by the City Council which are not currently on display (art, silverware and firearms). The Council could also look to sell the Mayors number plate and there will be a specific question included in the Budget consultation to elicit views on this.
- c) **Advertising - £438k increase by 2029-30.** In 2025-26 the council entered into a contract with Clear Channel for a share in the advertising revenue from bus shelters. Now that the contract is more established it is possible to more accurately assess the turnover rent.
- d) **Union Street car park £125k per annum**– A feasibility study is ongoing for the alternative use of Union Street car park from 2029-30 onwards
- f) **Fees and Charges** – Details of specific fees and charges increases in 2025-26 are given in Appendix 7 with summary details below:
 - a) **Off street Car Parking** –
 - i. City centre goes up by **30p to 50p** on all tariffs **£5.10 to £6.30** for first hour
 - ii. District centres up by **50p** on all tariffs with first hour ranging from **£3.10 to £3.20**
 - iii. Parks go up by **20p** on all tariffs from **£1.10 to £1.60** for first hour
 - b) **Park and Ride** – Nil on parking only tariffs with first hour free.
 - c) **Car parking permits**

- i. Outer car parks – annual permits up from **£105 to £110** alongside other changes
 - ii. Park and rides – annual permit up from **£380 to £420** alongside other changes
- d) **Garden waste bins - £94 increased to £98.70 (5.00% increase)** with an increase in the concessionary rate from £53 to £55.65 i.e. 5.00%
- e) **Replacement bins** – for the replacement of two wheeled blue, green and brown bins - £36.50 increasing to £38.30 i.e. 4.93%% increase
- f) **Bulky Waste collection:** Current charge of £23.50 per item increasing to £24.70 (5.11%) and from £34.50 to £36.00 (4.35%) for larger items, e.g. refrigerators, washing machines etc. with concessions remaining unchanged. 50% concessionary rates.
- g) **Land charges** – £65.75 to £72.00 - 9.51% increase
- h) **Planning fees** – Planning fees were last increased by the Government in December 2023
- i) **General Licenses** – Taxi licenses – nil increase. General licenses set by Government with no announcement currently of any increases
- j) **Leisure** – increases of between 5-7% reflecting running costs
- k) **Pitch fees:** Adult football pitches increased by £2 -£4 for weekdays and weekends respectively and under 17's £1 -£1.50 for weekdays and weekends respectively.

Other

- l) **Cemeteries**- exclusive rights of burial for 50 years- £58 increase per annum (5%)
- m) **Pest Control** – rates, mice etc. – 10% or cost of time taken
- n) **Dog warden collection** - £179.85 increased by £8.15 (4.5.%) to £188
- o) **Taxi Licenses** – Nil increase
- p) **Garages** - £1 per week – 5%

Expenditure Pressures

53. Excluding pay increases there are other service pressures which are impacting the council the most significant of which include :

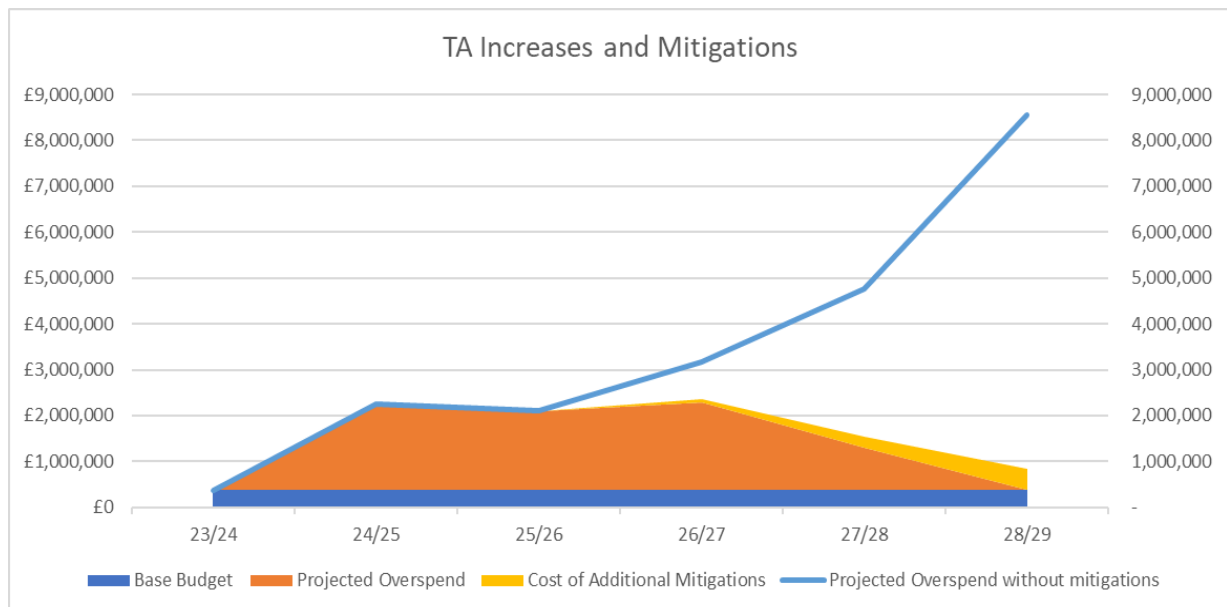
- a) **Net cost of Housing Benefits** – From 1-4-2025 most working age housing benefit claimants were migrated to universal credit. Whilst most housing benefit expenditure is reimbursed to the authority in full by way of housing subsidy, where supported accommodation is not provided by a registered provider, housing subsidy is capped. In 2025-26 there is currently a pressure of £1 million per annum arising from this expenditure and it is estimated that this pressure will continue to rise to an estimated £3 million per annum from 2026-27. To mitigate this pressure down to £2 million per annum the Housing Team are working to transfer housing stock from non-registered to registered providers.
- b) **Temporary Accommodation (TA)** – In 2025-26 the Council made provision for an additional £1.846 million per annum to fund ongoing temporary accommodation costs. Expenditure in this area continues to increase due to increasing demand. Current temporary accommodation placement rates have risen from an average of 4.36 households placed in 2022-23 to 10.2 so far in this financial year and spend is forecast to rise to £3.1 million to £5.7 million by 2027-28. The Council is currently housing 309 households in temporary

accommodation but only has around 188 units of its own stock (up from 100 in 2023), albeit there are plans to increase this to 300 units. Taking account of voids around 145 households are in hotel and “B&B” accommodation, mostly single adults. To mitigate this forecast increase in expenditure the following additional measures are being put in place:

- a. Acquire 260 new units of temporary accommodation, on top of the current plans for 300 units of which 150 will be delivered via HRA purchases costing around £32million, 60 HRA transfers, 25 conversions from the General Fund and 25 leased. These additions will come on stream over the next 3 years with an estimated 25% to be delivered by the end of 2026/27.
- b. Trial implementation of a new Hostel model that would increase support for homeless single adults and bring in an estimated £239k saving per annum
- c. An invest to save proposal focused on move on from TA, appointing a commissioned service to focus on the move on of single adults into the private rented sector on a payment by results basis
- d. A new face to face offer, allowing us to offer face to face assessments to all homeless applicants, improving our support offer to homeless households and helping ensure accurate priority need decisions which lead to placement
- e. Procuring a new ICT systems for Housing Needs to unlock productivity gains for the team

The collective impact on the Housing Service budget is an additional cost in 2026-27 linked to the cost of rolling out measures and new staffing and maintenance costs for a significantly larger TA stock and then savings in 2027-28 of £1.3 million and an additional £146k from 2028-29. The cost avoidance from these measures is forecast to deliver approximately £6m annually by the end of the 4 year MTFP period through the elimination of hotel and B&B use, this is on top of the estimated £8.5 million cost avoidance already being delivered primarily through the 200 units of additional TA currently delivered and other measures. This position can be shown graphically as :

Picture 3 : Temporary Accommodation Increases and mitigations



- c) **Oxford Growth Commission** - £100k one off staffing support 2029-30
- d) **ICT Inflation** - £120k per annum
- e) **Business rates on empty properties** e.g. Floyds Row - £188k per annum

New Expenditure

54. New Expenditure where the Council has a choice whether or not to undertake is estimated at around £300k per annum. This reflects areas which will be of benefit to the general public who wish to see core council services delivered well. The most significant includes :

- a) **Local Government Reorganisation** – Provision has been made for an amount of £2 million in respect of project management resource and consultancy to commence the authorities progress towards local Government re-organisation.
- b) **ODS clienting £160k per annum** The council has increased the amount of clienting of ODS in monitoring the way that it carries out statutory services for the council in the following areas
 - a. £50K per annum in relation to Section 42 and other works within the public highway.
 - b. Green spaces manager to manage ODS and OCC in areas such as trees, waterway and play equipment.- £70k per annum
 - c. £40k per annum – administrative assistant reporting to the Client and Commissioning Manager
- c) **Cowley Branch line manger £80k** per annum funded from Community Infrastructure levy funding. In October 2025 the government announced £120m of funding to re-open the Cowley Branch line to passengers and create two new stations at Oxford Cowley and Oxford Littlemore in south east oxford. So far £4.4 million has been invested in feasibility work and local partners will be asked to contribute £35 million to the total construction cost.
- d) **Additional legal resource £100k** per annum to assist with property transactions
- e) **2 new officers in the Community Safety Complex case Team £120k per annum** to deal with anti-social behaviours and exploitation in the vulnerability

- housed community, funded from HRA £80K and the Rough Sleepers Homelessness Grant (£40k)
- f) **3 new Community Response Officers £150k** per annum funded by the HRA to provide greater presence and address environmental crime and community safety in our housing areas.
 - g) **General licensing team £45k per annum**– 1 fte to deal with increased workloads, funded by increased licensing income
 - h) **ICT** - £1.119 million per annum increased costs arising from
 - a. Double running of the telephony contract £71k
 - b. ICT licenses cost uplifts £354k
 - c. Increased cost of cloud-based technology - £182k
 - d. Running costs for new Asset Management System - £175k
 - e. Data storage costs for QL, DRS and Civica in Azure cloud - £300k
 - i) Additional resource in **health and safety team** - £14k (0.2 fte) per annum
 - j) Increased staffing in **events team** £50k per annum – this is needed to deliver income anticipated by the MTFS
 - k) **Additional data analyst for LGR** work from 2027-28 onwards £52k per annum
 - l) **Extended opening hours in Hinksey Pool** to include March and October - £63k per annum
 - m) **Introduction of creche into Blackbird Leys Leisure Centre**- £37k per annum
 - n) **Broad Street** manual cleaning following changes to road layout- £67k per annum
 - o) **Weed spraying** for garage forecourts and car parks - £15k per annum
 - p) **Manual cleaning** Woodstock, Banbury, Cowley roads following changes to road and pavement layout-£57k per annum
 - q) **Pond cleaning, maintenance of Holywell cemeteries and Port Meadow litter picking** - £45k per annum
 - r) **Ecologist** - **£100k** per annum. Under the Environment Act 2001 there is a statutory duty to prepare management action plans for our green spaces and to include protection measures for protected species and habitats. There are 1.6fte ecologists in the sustainability team and this will boost their capacity
 - s) **Council tax recovery officer** - £50k per annum additional resource to assist with the recovery of council tax and business rates debt which has seen an increase of 8,000 properties and £77m debit over the last 15 years with limited increase in staff
 - t) **Investigation Services** - **£40k per annum**– funded by increased income - additional officer to secure current income as well as additional income from new contracts
 - u) **Data Cleansing Officer**- **£53k** per annum The post will drive and coordinate the implementation of recommendations from the recent (Citizen Contact) Data Cleansing.
 - v) **Extended opening hours at Hinksey Pool** - £63k per annum to include March and October

55. The Council's General Fund Budget for Consultation is set out in Appendices 1, 2 and 3 attached and summarised below:

Table 5 – Medium Term Financial Strategy 2026-27 – 2029-30

| Medium Term Financial Strategy 2026/27 - 2029/30 | | | | | | | | |
|----------------------------------------------------|--|--|--|--|--------------|--------------|--------------|--------------|
| | | | | | 2026/27 | 2027/28 | 2028/29 | 2029/30 |
| | | | | | £ | £ | £ | £ |
| Base Budget | | | | | 32,281,979 | 32,281,979 | 32,281,979 | 32,281,979 |
| Efficiencies | | | | | (853,000) | (1,151,000) | (1,393,000) | (1,316,000) |
| Fees and Charges | | | | | (2,117,000) | 866,000 | (1,382,000) | (2,719,000) |
| New Investment | | | | | 222,000 | (346,000) | (577,000) | (487,000) |
| Service reduction | | | | | (201,000) | (302,000) | (394,000) | (394,000) |
| Inflation & other pressures | | | | | 4,139,370 | 2,752,510 | 2,828,660 | 2,835,108 |
| Revenue Contributions | | | | | 1,753,710 | 1,696,286 | 1,734,140 | 900,600 |
| Net interest | | | | | (6,382,137) | (5,619,795) | (5,287,985) | (5,508,127) |
| Depreciation reversal | | | | | (5,662,415) | (5,662,415) | (5,662,415) | (5,662,415) |
| Corporate costs including MRP, pay | | | | | 7,900,554 | 9,852,192 | 12,423,915 | 14,432,966 |
| Contingencies | | | | | 2,650,000 | 650,000 | 650,000 | 650,000 |
| Transfers to/ (from) reserves and working balances | | | | | (1,786,852) | (2,123,678) | (2,825,727) | (972,738) |
| Net Budget Requirement | | | | | 31,945,209 | 32,894,079 | 32,396,567 | 34,041,374 |
| FUNDING | | | | | | | | |
| Revenue Support Grant | | | | | (3,664,972) | (3,560,342) | (3,704,156) | (3,704,156) |
| Council Tax | | | | | (17,689,992) | (18,411,715) | (19,162,451) | (19,943,365) |
| Retained Business Rates | | | | | (11,440,244) | (10,922,023) | (9,529,960) | (10,393,852) |
| Deficit on council tax and business rates | | | | | 850,000 | 0 | 0 | 0 |
| Total | | | | | (31,945,208) | (32,894,079) | (32,396,567) | (34,041,373) |
| (Surplus)/ Deficit | | | | | 0 | (0) | 0 | 0 |

Key:

- **MRP – Minimum Revenue Provision** – A charge made to revenue in respect of the cost of borrowing to fund the Capital Programme.

Use of Working Balances and Transfers from Reserves

56. The MTFP allows for the use of £7.8 million of reserves over the 4 year period. Other earmarked reserves that are not ring fenced at 31-3-2025 stand at around £20 million which could be re-prioritised. In addition to these reserves there is another £3.6 million un-ringfenced working balance.

Risk Implications

57. The main risks to the balanced position of the General Fund consultation budget (Appendix 8) are that:

- Provisional Finance Settlement when announced in December is not as good as assumed.
- Savings from efficiencies and transformation are not achieved.
- Council income streams are less than budgeted.
- Failure or uncertainty of major partners to deliver for instance in Leisure.
- Companies do not perform as well as expected leading to reduced income to the Council.
- Business Rates income is lower than forecast.
- Variations in interest rates or non-performance of property funds and multi asset vehicles effecting returns to council.

- h) Slippage in the capital programme adversely affects revenue savings and additional income in the MTFS.
- i) Cuts by partner organisations such as the County Council adversely affect service provision.

Wholly Owned Companies and Joint Ventures

Oxford Direct Services Ltd

58. On 1st April 2016 the Council established a wholly owned local authority trading company for services provided by Direct Services at that time. The company takes the form of:
 - a) A Teckal company (Oxford Direct Services Ltd)– providing all statutory services to the Council benefiting from a procurement exemption together with externally traded services for engineering, motor transport and building works.
 - b) A Trading Company (Oxford Direct Services Trading Ltd) – providing externally traded commercial waste services.
59. The 2024-25 accounts for ODS have now been signed off by the auditors indicating an overall surplus of around £3.11million a £1 million favourable variance to the budgeted position for ODSL and a surplus of £1.1 million, a favourable variance of £0.3 million to budget for ODSTL. A dividend of £2.4 million in line with MTFP expectations was agreed by shareholders on 4th December.
60. The last Business Plans presented to shareholders in April 2025 forecast a less than favourable outlook. For ODSL the Plan indicated decreasing profit projections from 2025-26 onwards with 2028-29 surpluses reducing to zero. The company sight increasing unfunded inflationary pressures which are more prevalent in housing repairs. Property services continue to drive the majority of surpluses although this will only defer the decline of overall surpluses. The allocation of more housing related work from the Council to the Company would be one mitigation although it is unclear whether this will occur under more rigorous clienting and commissioning from the Council.
61. ODSTL Business Plan fared slightly better, with surpluses forecast to rise from £623k in 2025-26 to an estimated £2.5 million in 2028-29 driven by organic, aspirational growth, particularly in commercial waste, property services, facilities management and acquisitions.
62. At shareholders on 4th December a revised business plan was presented to shareholders for the 2 companies. For ODSTL the growth of surpluses is less aggressive than previously shown with surpluses of £2.5 million topping out in 2029-30 rather than 2028-29 shown previously. ODSL surplus indicates more optimism, arising from increased payments from the council, a reduction in overheads by the Company, as well as potential increased volume of work from the Council. Whilst the surpluses continue to decline the indications are that they will stay above breakeven over the next 4 year MTFP period.
63. The decline of surpluses in ODSL is shown below as being replaced by surpluses in ODSTL and hence the overall dividend to the council should remain stable

especially as the company also has access to other retained profit. A prudent amount of dividend of around £2.4 million per annum has been estimated over the 4 year period of the MTFP i.e. a reduction of around £2.4 million over the 4 year period to that previously forecast.

Table 6 Oxford Direct Services Surpluses and Estimated Dividend

| Update to shareholders December 2025- | | | | | | | |
|---------------------------------------|--|--|---------|---------|---------|---------|---------|
| | | | 2025-26 | 2026-27 | 2027-28 | 2028-29 | 2029-30 |
| | | | £000's | £000's | £000's | £000's | £000's |
| Supluses | | | | | | | |
| ODSL | | | 2,000 | 1,800 | 1,400 | 600 | 500 |
| ODSTL | | | 600 | 900 | 800 | 1,800 | 2,500 |
| | | | 2,600 | 2,700 | 2,200 | 2,400 | 3,000 |
| Dividends | | | 2,000 | 2,400 | 2,400 | 2,400 | 2,400 |

Note : The dividend is paid to the council in the year after the year to which it relates

Housing Company- Oxford City Housing Ltd trading as OX Place

64. March 2016 the Council approved the establishment of a wholly owned Local Authority housing company that was incorporated in June 2016, Oxford City Housing Limited with the objective of delivering affordable housing and also a financial return back to the council. The Company, consisting of a holding company OCHL (Holding) Ltd, a development company, OCHL (Development) Ltd and an investment company OCHL (Investment) Ltd trades as OX Place.
65. In November 2024 shareholders agreed to the transfer of properties from the Barton development that were managed by OCH(I)L to be transferred to the Councils HRA. This decision was ratified at Council on 25th November 2024 together with a decision for all future properties from the Barton development to be purchased by the Council. The company will become a dormant legal entity pending a decision on its future use.
66. The 2024-25 audited accounts were presented to shareholders in November 2025 with a recommendation for a dividend payment to the shareholder of £4.463 million following the payment of £5 million of dividends in the previous 2 years.
67. The Company are also intending to pay a dividend of £3 million in 2026-27 which has been factored into the MTFS. After this, there are no currently no further dividends forecast by the Company or included within the councils MTFS. At shareholders in December shareholders were advised that following changes to tenure and the delivery of a number of key schemes such as Redbridge and Sandy Lane, there would be a significant increase in forecast surpluses, although it was too early to include these surpluses in any dividend recommendation, given the need for these schemes

to obtain planning permission. The Company are currently considering their business strategy going forward which will be presented to shareholders in due course.

Oxford West End Development (OXWED LLP)

68. The Council has a 50/50 partnership with Nuffield College to undertake the development of the land at Oxpens for residential and commercial purposes. The 2024-25 accounts for the LLP have recently been approved and indicate a loss for the organization of £2.6m for the year.
69. The Council has invested money on a 50/50 basis with its partner Nuffield College at a loan investment rate of 4% above base rates with loans outstanding and accrued interest at 31-3-2025 of circa £21 million.
70. In October 2025 the scheme received planning permission, and an update will be presented to shareholders in December.
71. The overall aim of the development was that there would be significant gross value added, additional council tax, business rates and dividend return from the LLP. However, shareholders were advised that the market for this type of development had changed and the scheme would require a different delivery strategy. This strategy was being worked up and would be the subject of a report to the next meeting of shareholders. It is unlikely that this strategy would lead to any financial return to the Council over the next 4 year MTFS.

Section C Housing Revenue Account Budget

Background

72. The Council continues to operate an ambitious programme of investment both in the maintenance and refurbishment of its existing stock of 8,077 council dwellings, regeneration of its council estates and investment in new social housing dwellings constructed by the Council's wholly owned company Oxford City Housing Limited (OCHL). The current HRA Capital programme includes £165 million being spent on the purchase of 448 new build affordable homes from OCHL. The overall commitment to OCHL is for the purchase of 806 dwellings will be completed over the MTFP (running to March 2030), of which 424 will have been completed by 31st March 2026.
73. In addition to the OCHL new build developments, the HRA is directly commissioning 847 affordable homes with an overall budget of £286 million. 107 of these homes are forecast be completed by 31st March 2026.
74. There will also be 117 acquisitions in the same period. This includes the RRTBR programme, delivery through grant funded acquisition programmes and the additional acquisitions programme approved by Cabinet in April 2024. Further to this there is a strong pipeline of potential incoming schemes.
75. In managing the future risks that will inevitably start to rise as more debt is taken on to facilitate new build housing and regeneration the Head of Financial Services as well as paying attention to net income makes use of Prudential indicators to manage these risks. Prudential indicators are used in the Treasury Management Strategy and are a

matter of judgement by the Section 151 Officers but those typically used by banks and building societies to assist management would be:

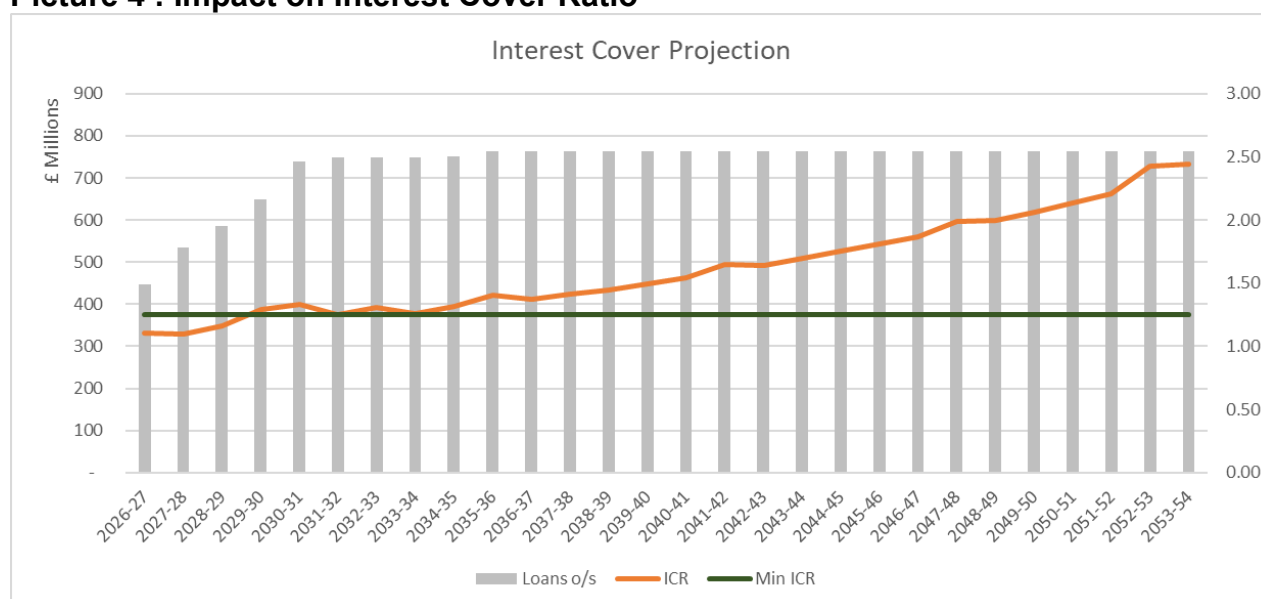
- a) Interest cover ratio – ratio of operating surplus divided by interest cost i.e. how many times interest can be paid from surpluses.
- b) Loan to value ratio- outstanding debt/ fixed asset value at year end.
- c) Debt to income ratio – Turnover / debt

76. The most widely used ratio is interest cover and used by the Council which measures how many times surpluses cover the interest charge and typically Registered Providers would operate on a ratio of 1.72:1 and 2.1:1. As a golden rule 1.25:1 would be acceptable especially given the significant housing development being undertaken by the Council.

77. Due to the increased demands placed on the HRA through the new compliance regulations (as introduced by the Regulator for Social Housing) the Section 151 Officer has agreed a trajectory of interest cover ratio of 1.10 : 1 over the first 4 years of the Business Plan and thereafter budgeted spend is approved which seeks to ensure that this ratio is maintained at a level of at least 1.25:1.

78. The chart below shows this ratio graphically.

Picture 4 : Impact on Interest Cover Ratio



| Table 7 : Increase Cover Ratio | | | | | | | |
|--------------------------------|---------|---------|---------|---------|---------|---------|---------|
| Interest Cover Projection | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2030-31 | 2031-32 | 2032-33 |
| ICR | 1.10 | 1.10 | 1.16 | 1.29 | 1.33 | 1.25 | 1.31 |
| Min ICR | 1.25 | 1.25 | 1.25 | 1.25 | 1.25 | 1.25 | 1.25 |

In line with the assumptions below the above chart indicates

1. The HRA programme is borderline affordable with the ICR marginally below the minimum of 1.25 until 2029-30. There is in effect no capacity for further spend in the HRA Business Plan in the medium term.
2. The rent increases have been extended at CPI+1% for a period of 10 years post 2025-26 resulting in further borrowing capacity from around 2032-33 of around £800m over the next 30 years. Although not included over the next 5 years, the council will have choices of where to spend the additional borrowing capacity that is expected to arise from 2032 onwards. Although not exhaustive these choices would include:
 - **Existing dwellings** – additional investment for decent homes standard which is not currently in the programme.
 - **Zero carbon works** – Included within the 5-year Investment Plan is £22 million for energy efficiency works which will assist with progressing the council towards zero carbon by 2040. Notwithstanding the potential additional borrowing capacity, the current HRA business plan already includes a total of £48 million for the 40-year period.
 - **New dwellings** –the current 10-year housing investment programme with OX Place, notwithstanding slippage, will come to an end in 2032. There is potential to extend the housing investment programme to create more social housing in Oxford.

Key Assumptions in the HRA Business Plan

79. The rent increases included in the HRA Business Plan are based on CPI+1% for the next 10 years.
80. An announcement regarding the proposals for rent convergence is due at the end of November. The re-introduction of rent-convergence measures as per the Government's consultation document "How to implement Social Rent convergence" published on 2nd July 2025, would affect the following number of tenants and give rise to increased rental income for the HRA as follows:

| Table 8 : Impact of rental convergence | | | |
|----------------------------------------|----------------------------|---------------------------------|---------------------------------|
| Proposed Weekly Convergence Rate | Number of affected Tenants | Weekly Additional Rental Income | Annual Additional Rental Income |
| £1 | 6,884 | £6,875.04 | £357,502.08 |
| £2 | 6,884 | £13,745.08 | £714,744.16 |

81. The HRA BP assumes that it will continue to purchase the affordable housing from OCHL's 8-year development programme 1,200 properties within a gross overall budget envelope for all years of £452m before grant and shared ownership sales. The HRA purchases such social dwellings from OCHL based on a set of 'financial viability indicators agreed with the Councils Section 151 Officer as follows:

- a) Net present value (NPV)– positive over a 70 year period
- b) Payback – 70 years or under

- c) Internal rate of return IRR -(the discount rate which equates the Net Present Value to zero) of 3%

82. These criteria are comparable to the Housing Company of a positive NPV over 40 years, 40-year payback and 4% IRR. The HRA criteria are less favourable to reflect the nature of the social dwellings being purchased.

83. The debt profile of the HRA together with the resulting HRA working balance over the next few years is shown as follows:

| Table 9 : HRA Outstanding loans and Working Balances | | |
|-------------------------------------------------------------|-----------------------------|------------------------|
| | Closing Loan Balance | Working Balance |
| | £000's | £000's |
| 2026/27 | 449,079 | 4,278 |
| 2027/28 | 537,079 | 5,501 |
| 2028/29 | 589,079 | 7,579 |
| 2029/30 | 651,079 | 11,930 |
| 2030/31 | 742,079 | 17,366 |
| 2031/32 | 752,079 | 11,279 |
| 2036/37 – Peak Debt | 767,079 | 52,444 |
| 2063/64 | 75,551 | 340,259 |

84. In the latter years of the 40-year Business Plan, HRA working balances begin to increase once again, enabling increased activity to be undertaken.

Key assumptions made in preparing the HRA budget for 2026/27 – 2030/31

Rent Increases

85. The Regulator is expected to publish the final Rent Standard following the Autumn Statement on 26 November 2025, which will confirm convergence mechanisms and uplift limits. It is worth noting:

- The new policy will apply for at least 10 years from April 2026.
- It covers low-cost rental accommodation (not shared ownership).
- It reintroduces rent convergence for properties below formula rent.

86. The maximum increase in rent for the period 2026/27 to 2035/36 is expected to be restricted to CPI (as at September of the previous year) plus 1 percentage point + up to [£1/£2] in any year where actual weekly rents are below formula rent. If the difference between actual weekly rents and formula rent is less than [£1/£2], then the level of uplift will be adjusted accordingly so that the weekly rents charged do not then exceed formula rent.

87. As well as the restriction on maximum increases, rents are also capped as follows:

- **Social Rent** – applies to the majority of council dwellings - rent caps apply as a maximum ceiling on the formula rent and depend on the size of the property (the number of bedrooms it contains). Where the formula rent would be higher than the rent cap for a particular size of property, the rent cap must be used instead.
- **Affordable Rents** – applies to around 68 of our dwellings - The rent for affordable rent housing (inclusive of service charges) must not exceed 80%

of gross market rent. 'Gross market rent' means the rent (inclusive of any applicable service charges) for which the accommodation might reasonably be expected to be let in the private rented sector. Property size, location type and service provision must be taken into account when determining what gross market rent a property might achieve if let in the private rented sector.

88. The HRA must adhere to these restrictions and caps on rent increases even if a tenant's rent is below formula rent, or if the HRA has previously applied a lower – or no – annual increase. Where this is the case, the HRA may only move the rent up to formula rent when the property is re-let following vacancy (subject to the rent cap).
89. The table below demonstrates the amount of rental income foregone as a result of these restrictions.

| Table 10 : Rental Income Foregone | | | |
|------------------------------------------|-----------------------------|-----------------------------------|--------------------------------------------|
| | Number of Properties | Total Weekly Rent Foregone | Total Annual Rental Income Foregone |
| Actual Rent is less than Formula Rent | 7,986 | £77,385 | £4,024,020 |

Rent Flexibility

90. Landlords are permitted under the regulations to set rents at levels above the social formula rents where it has taken local factors, market conditions and affordability into account. For general needs accommodation a 5% flexibility is allowable which the Council already applies to new build housing. For supported housing, such as sheltered schemes a 10% flexibility is allowable.
91. Not all our rents are at a level equal to the formula rent for the property. Where a property becomes vacant and is going to be let to a new tenant, the formula rent for the property shall be set at 105% of formula for general needs accommodation and 110% of formula for all supported housing units.
92. For planning purposes, the assumed rent increase for 2026-27 is assumed to be 4.8% with increases of 3% assumed for future years. The impact on current rents of this increase together with an allowance of £2 per week for movement towards formula rent results in an average increase of £8.47 per week, details of which is shown in Appendix 5.

Shared Ownership Dwellings

93. The rent increase for Shared Ownership will be CPI + 1% based on the CPI rate for the 12 months to the end of September 2025. This will only apply for shared ownership properties owned for the whole of the preceding 12 months (i.e. before 1st October 2024). For properties purchased after the 1st October 2024 the increase for 2026/27 will be 0.5%.

94. The rent rise included in the Consultation Budget under these agreements is effectively an increase of 0.5% for properties less than 12 months old (as at 30th September 2025) of which the council currently has 4 such properties and CPI + 1% (4.8%) for older properties of which the council has 64 properties

Right to Buy and other disposals

95. Disposal of around 20 dwellings per year is assumed from 2026-27 onwards although this may be optimistic given the recent reduction to the discount rates. Within the development programmes to be purchased from OX Place, there will be shared ownerships on most of the schemes. The Council will receive a capital receipt from the initial element purchased by the homeowner. There will also be additional capital receipts if the homeowners opt to make additional investment in the share of their home known as 'stair-casing' enabling the homeowner to own a greater proportion of their home.
96. Local authorities are now able to retain 100% of capital receipts, although the maximum discounts on Right-To-Buy housing applications has been reduced. The decrease in the discount may well see the number of property disposals reducing which may counteract the additional freedom to retain 100% of the receipt.

Inflation and pay assumptions

97. All the assumptions for inflation are the same as for the Council's General Fund.

Service Charges

98. Service charges are currently being reviewed, and where possible the service charges will be based on the actual costs incurred by the Council.
99. For service charges where the actual breakdown of costs is incalculable, they will be increased by CPI +1% i.e. 4.8% in line with the rental charge across all tenure types in the HRA. This increase will ensure that the income will cover the actual costs that have increased by RPI.
100. There is no proposed increase to the Furnished Tenancy multiplier in respect of charges to tenants who take up the offer of the provision of white goods and other fittings. The current multiplier of 1.5155 is considered sufficient to cover the costs of running the scheme.

Working Balance

101. The working balance levels allow sufficient monies for the funding of future years' Capital Programme, the repayment of the debt, as well as an amount of £3.5 million as being the minimum required to cover unexpected events such as falling investment income or increased costs.

Variations to Budget

102. Variations to the HRA budget are shown in Appendix 3 with explanations shown below:

Service Pressures

- Shared Ownership Repairs Allowance (£5,000)
- Complaint Compensation (£30,000)
- Council Tax for Long-Term Void Properties (£180,000)
- Service Charges (£40,000)
- Increase in ODS Caretaking & Estate Services (£318,000)

New Bids

- Increase in resident Involvement budget to reflect the reset work - Resident Rewards, training, conferences & events (£40,000)
- Increase in Elmore complex case capacity (£30,000), to ensure that there is sufficient complex needs support of tenants beyond the tenancy sustainment offer
- 3 x Community Response Team Officers (£150,000)
- Localz Contract funding for ODS (inc. text message bundle) (£40,000)
- Consultants for QL Project x2 (£200,000)
- Provision for HRA Asset Management Team (Gross increase of £2.2 million or £1.588 million after recharges to capital)
- Additional staffing and repair and maintenance costs for additional TA units (£200,000)

Revenue Budget Savings / Reductions:

- Efficiency Savings following budget review (£200,000)
- Increase in Costs recovered through Housing Benefit by remodelling our approach to Temporary Accommodation (£363,000)
- Shrubs ICT system (£40,000)
- TA Rental Income for 150 new Units @ £120 per week (£936,000)
- Gap Funding from Housing Needs for TA Units (£360,000)

Capital budget amendments:

- Acquisition of 150 TA Units at a total cost of £32m (Saving the GF financing costs of circa £1.7m per annum)
- Re-procurement of Housing & Asset Management System inc. mobile £2m (This is required to commence procurement and may not be needed in full.
- Inclusion of an additional £12m contingency for Tower Block Remediation Works.
- Tower Block Water tanks £100k feasibility
- Play / Seating Areas £60k per annum
- Contingency for in-year additional demands or regulatory changes £0.5m

- Contingency in the capital programme for urgent additional works identified through the remaining stock condition surveys now underway (17% of the stock). £0.5m
- 3x new direct delivery development schemes have also been included (Elsfield Hall, Knights Court, and Cave Street), the budget for which is currently included in the budget for purchases from OCHL.

Housing Revenue Account Budget 2026/27 to 2030/31

103. Appendix 4 details the HRA Budget for the period 2026/27 to 2030/31 which is summarised below:

Table 11 – Housing Revenue Account (HRA) 2026-27 to 2030-31

| | 2026/27 £000's | 2027/28 £000's | 2028/29 £000's | 2029/30 £000's | 2030/31 £000's |
|-----------------------------------------------|---------------------------|---------------------------|---------------------------|---------------------------|---------------------------|
| Income | (68,207) | (74,958) | (78,766) | (84,390) | (89,017) |
| Expenditure | 66,639 | 73,766 | 76,729 | 80,098 | 83,665 |
| Net Operating Expenditure/(income) | (1,568) | (1,191) | (2,037) | (4,293) | (5,352) |
| Investment income | (43) | (32) | (41) | (58) | (84) |
| (Surplus)/Deficit for the Year | (1,611) | (1,223) | (2,078) | (4,350) | (5,437) |
| (Surplus)/Deficit b/fwd | (5,832) | (7,443) | (8,666) | (10,744) | (15,094) |
| (Surplus)/Deficit c/fwd | (7,443) | (8,666) | (10,744) | (15,094) | (20,531) |

Risk Implications

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

- The government introduces a rent cap which is less than CPI+1%
- Increased arrears due to benefit changes
- Construction delays in Housing Company and subsequent effect on capital spend on new housing and net rental streams.
- Variations in estimates causing cash flow problems.

Section D Capital Programme

Optimism Bias

105. In previous years the spend profile on the programme has not matched that of the budget set. Typically, only spend of around 60% has been achieved. This shortfall

can be for a number of reasons, most simply relating to delays in development, not least due to cost and borrowing increases, and the complexity of some of our key sites and assets, most of which members will be aware of. This underspend can have a significant impact on the local authorities' finances. On the one hand, not spending money reduces the need to borrow, but failing to spend money planned also reduces the ability to plan available funds and can reduce investment income.

106. The HM Treasury Green Book on how to appraise programme and projects also recognises 'optimism bias' or the tendency for appraisers to be over optimistic about key project parameters including capital costs, operating costs, and project duration. The Green Book recommends adjusting for this based on past experience.
107. In drawing up the capital programme for this year an optimism bias has been applied to both General Fund and HRA Capital which has the effect of reducing the capital with cost of capital revenue costs being adjustment accordingly in the MTFP.
108. The total budgeted capital spend of £725 million over the four year programme is therefore reduced to £696 million, as follows:

Table 12 : Capital Programme Optimism Bias

| | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total Proposed Programme |
|--------------------------------------------------------------|-------------|-------------|-------------|--------------|--------------------------|
| Optimism Bias 40% | £ | £ | £ | £ | £ |
| General Fund | 69,721,926 | 31,758,184 | 30,868,554 | 14,262,887 | 146,611,551 |
| Slippage from previous year | 37,157,396 | 42,751,729 | 29,803,965 | 24,269,008 | 133,982,097 |
| Slippage in current year at 40% | -42,751,729 | -29,803,965 | -24,269,008 | -15,412,758 | 112,237,459 |
| Revised Programme | 64,127,593 | 44,705,948 | 36,403,511 | 23,119,137 | 168,356,189 |
| HRA | 140,336,337 | 149,132,860 | 89,881,556 | 199,121,704 | 578,472,457 |
| Slippage from previous year | 58,059,560 | 79,358,359 | 91,396,488 | 72,511,217 | 301,325,624 |
| Slippage in current year at 40% | -79,358,359 | -91,396,488 | -72,511,217 | -108,653,169 | 351,919,232 |
| Total revised programme assuming optimism bias of 40% | 183,165,131 | 181,800,679 | 145,170,337 | 186,098,890 | 696,235,037 |

General Fund Programme

109. The total programme over the four-year period is estimated at £146 million. Applying optimism bias of 40% taking into account slippage from 2025-26 increases the programme to £168 m.
110. New ICT Schemes of around £2.7 million are included in the budget as well as £1 million for Oxford ice rink roof works, £317k of street light upgrades and £260k for electric vehicle charging infrastructure for fleet. Additionally works added from the capital pipeline includes £1million for waterways investment, £150k for fire risk assessments, £100k for stone wall refurb. £750k for Blackbird Leys regeneration, £200k for a new substation at the covered market, £600k for replacement lifts.

Pipeline of capital projects

111. There are a number of capital projects totalling £42.7 million which have yet to be fully worked up such as energy surveys, town hall works and waterways. These are held in a pipeline which will be subject to the full rigour of scrutiny through the Development Board before being submitted for member approval. These schemes include :

- Oxford flood alleviation- £1.3million. The Council has previously contributed towards this scheme (£1.5 million plus £900k of land). The Environment Agency are looking for further funding although if approved this will be the back of the MTFP
- Cowley Branch Line £32.5 million – Additional to existing capital scheme to be funded by partner contributions for which the council will be the accountable body
- Waterways capital investment £3m - to make sure that waterways ownership is safe, following survey work to sluice gates, banks, tow paths, culverts etc
- Town Hall property works – extension to the town hall works programme - £4m
- Hinksey Pool Sauna - £79k is included as an indication of the potential cost but a firm proposal needs to be worked up.

112. Funding of the Program is by Community Infrastructure Levy and Section 106 £8 million (5%), borrowing £100 million (68%) Government Grants £11 million (8%), capital receipts £27m (19%) All revenue costs have been included in the General Fund revenue budget.

Housing Revenue Account Capital Program

113. The draft HRA Capital Program is intrinsically linked to the HRA Business Plan since the resources to fund the Programme are largely generated through housing rents. Appendix 6 shows the existing HRA capital program over the next four years totaling £578 million before the application of optimism bias which reduces the programme to £527million.

114. The draft HRA Capital Program can, for the most part, be categorized as follows:

- a. Investment in existing housing stock – Planned Maintenance
- b. Social Housing Acquisition and Development Program – new homes. In total this is shown as £390 million over the 4-year period 2026/27 to 2029/30 with around £180 million being delivered by Oxplace and £210 million via direct delivery through the HRA. Specific details of schemes being delivered by Oxplace are shown in the exempt from publication Appendix 10

115. The 5-year investment program plan for our existing housing stock has been developed on the basis of the latest stock condition surveys (over 85% of council homes had been surveyed, the remaining 1140 homes had no access as at the end of September 2025 and these remaining surveys will be undertaken by an external contractor by the end of March 2026). In addition to the stock condition reports, the new Housing Regulation and Inspection regime; the new Client Management arrangements; and Revised Financial Arrangements were also considered.

116. The new investment plan consists of the following components, all of which contain further detailed breakdowns of projected costs:
- c. Safety & Compliance Works
 - d. Works to Street Properties
 - e. Works to Blocks & Flats
 - f. Other Priority Spend Areas
 - g. Works to Energy Efficiency Targets
 - h. Capital Projects
117. The Social Housing Acquisition and Development Program has been amended to reflect the latest profiled forecasts. Some schemes have also been moved to direct delivery by the HRA but are still being overseen by the OXP team. Reprofiling is required as some schemes face many challenges during the development phase which can cause significant delays – planning objections and policy changes, and procurement and contractor issues.
118. The financing of the HRA Capital Programme is from capital receipts £48 million, (8%) arranged borrowing £449 million (78%), Major Repairs Reserve £54 million (9%) and Homes England Grants £28 million (5%)

Risk Implications impacting the Capital Programme

119. The main risks to the Capital Programme are set out in Appendix 8 and summarised below:
- a) Right to buy disposals as detailed in the assumptions are not as forecast causing a shortfall in funding of schemes.
 - b) Delays in construction of new homes by OXPlace.
 - c) Slippage in Capital Programme and impact on delivery of priorities.
 - d) Robustness of estimates.

Budget next steps

120. The timetable for consultation and for Budget approval by Council is set out in the following table:

| Table 13: Budget Consultation Timetable | |
|------------------------------------------------------------------|------------------------------------------------|
| Consultation Budget Report to Cabinet | 10th December 2025 |
| Budget Consultation Period | 11th December to 31 st January 2026 |
| Final Budget Report to Cabinet including outcome of Consultation | 11th February 2026 |
| Budget approval and Council Tax Setting Council | 23rd February 2026 |

121. The Council will make use of its citizens' panel as well as an online survey. The survey will be publicised in local newspapers and the budget will be shared with other stakeholders, such as trade unions and local voluntary organisations and businesses for comment.

122. Tenants will be consulted on the HRA budget including rent and service charge changes with a special resident focus group(s) and the tenant newsletter 'Tenants in Touch'.

Financial Implications

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

Legal Implications

124. Section 30 of the Local Government Finance Act 1992 requires that a local authority 'must set a balanced budget and council tax before the 11th March in the financial year preceding that for which it is set'. Consultation will be undertaken with the General Public for a period of six weeks in accordance with CIPFA Guidance.
125. The Local Government Act 2000 in particular Section 9 states that it is the responsibility of the full council, on the recommendation of the Cabinet to approve the budget and related council tax demand.
126. The Local Government Act 2003, section 25 requires the Council's Section 151 Officer to report to the council on the robustness of the estimates made and the adequacy of the proposed financial reserves assumed in the budget calculations. This will be done at Council in February 2025 when the Budget is approved.
127. Failure to set a legal budget may lead to intervention from the Secretary of State under section 15 of the Local Government Act 1999.

Risk Implications

128. Detailed risks are shown in Appendix 8 of the report.

Equalities Impact Assessment

129. These are shown in Appendix 9 of the report.

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OXFORD CITY COUNCIL GENERAL FUND REVENUE BUDGET 2026/27 FOR CONSULTATION AND FUTURE YEAR CONTROL TOTALS - APPENDIX 1

| | Recommended Budget 2026/27 | % of Total | Proposed Budget 2027/28 | % of Total | Proposed Budget 2028/29 | % of Total | Proposed Budget 2029/30 | % of Total |
|--------------------------------------------------|-------------------------------|---------------|----------------------------|---------------|----------------------------|---------------|----------------------------|---------------|
| | £000's | | £000's | | £000's | | £000's | |
| CITY & CITIZENS SERVICES | 15,152 | 45% | 13,629 | 40% | 13,237 | 42% | 13,259 | 44% |
| Communities & Citizen Services | 5,923 | 18% | 5,778 | 17% | 5,442 | 17% | 5,374 | 18% |
| Business Support | 21 | % | 21 | % | 21 | % | 21 | % |
| Customer Services | (40) | (%) | (40) | (%) | (40) | (%) | (40) | (%) |
| Leisure Management | 2,616 | 8% | 2,497 | 7% | 2,233 | 7% | 2,165 | 7% |
| Sport and Physical Activity | 316 | 1% | 316 | 1% | 316 | 1% | 316 | 1% |
| Community Centres | 1,141 | 3% | 1,113 | 3% | 1,085 | 3% | 1,085 | 4% |
| Youth Ambition | 251 | 1% | 251 | 1% | 251 | 1% | 251 | 1% |
| Culture | 536 | 2% | 486 | 1% | 486 | 2% | 486 | 2% |
| Localities Team | 1,070 | 3% | 1,070 | 3% | 1,026 | 3% | 1,026 | 3% |
| Community Response | 12 | % | 12 | % | 12 | % | 12 | % |
| Business Intelligence | 0 | % | 52 | % | 52 | % | 52 | % |
| Housing Services | 8,075 | 24% | 6,697 | 20% | 6,641 | 21% | 6,731 | 22% |
| Strategy & Service Development | 1,172 | 4% | 1,172 | 3% | 1,172 | 4% | 1,172 | 4% |
| Garages | 110 | % | 110 | % | 110 | % | 110 | % |
| Homelessness Prevention | 859 | 3% | 759 | 2% | 759 | 2% | 759 | 3% |
| Rapid Re-Housing | 4,246 | 13% | 2,968 | 9% | 2,912 | 9% | 3,002 | 10% |
| Rough Sleeping & Singless Homelessness | 1,688 | 5% | 1,688 | 5% | 1,688 | 5% | 1,688 | 6% |
| Community Safety | 1,154 | 3% | 1,154 | 3% | 1,154 | 4% | 1,154 | 4% |
| Community Safety | 1,154 | 3% | 1,154 | 3% | 1,154 | 4% | 1,154 | 4% |
| INFORMATION & TECHNOLOGY | 2,266 | 7% | 1,972 | 6% | 2,098 | 7% | 2,229 | 7% |
| ICT | 2,266 | 7% | 1,972 | 6% | 2,098 | 7% | 2,229 | 7% |
| PLACE | (3,686) | (11%) | (4,236) | (12%) | (6,687) | (21%) | (8,004) | (27%) |
| Corporate Property | (9,144) | (27%) | (9,678) | (28%) | (12,077) | (39%) | (13,481) | (45%) |
| Property Services | 1,615 | 5% | 1,615 | 5% | 1,435 | 5% | 1,435 | 5% |
| Asset Management | (11,645) | (35%) | (11,999) | (35%) | (14,218) | (45%) | (15,622) | (52%) |
| Transactions & Special Projects | 141 | % | 141 | % | 141 | % | 141 | % |
| Town Hall & Facilities | (98) | (%) | (98) | (%) | (98) | (%) | (98) | (%) |
| Parks Development | 842 | 3% | 662 | 2% | 662 | 2% | 662 | 2% |
| Economy Regeneration & Sustainability | 2,694 | 8% | 2,703 | 8% | 2,666 | 9% | 2,753 | 9% |
| Economic Development | 821 | 2% | 656 | 2% | 656 | 2% | 656 | 2% |
| Development Team & PMO | 356 | 1% | 356 | 1% | 356 | 1% | 356 | 1% |
| Housing Supply | 104 | % | 104 | % | 104 | % | 104 | % |
| Environmental Quality | 378 | 1% | 588 | 2% | 588 | 2% | 588 | 2% |
| Energy & Natural Resources | 465 | 1% | 465 | 1% | 465 | 1% | 465 | 2% |
| Smart, Sustainable Cities | 572 | 2% | 536 | 2% | 499 | 2% | 586 | 2% |
| Planning & Regulatory Services | 2,764 | 8% | 2,739 | 8% | 2,724 | 9% | 2,724 | 9% |
| Development | (264) | (1%) | (264) | (1%) | (264) | (1%) | (264) | (1%) |
| Support Services | 291 | 1% | 266 | 1% | 251 | 1% | 251 | 1% |
| Information Services | 19 | % | 19 | % | 19 | % | 19 | % |
| Spatial Development | 1,653 | 5% | 1,653 | 5% | 1,653 | 5% | 1,653 | 5% |
| Regulatory Services | 1,064 | 3% | 1,064 | 3% | 1,064 | 3% | 1,064 | 4% |
| COMPANIES | 11,865 | 35% | 14,957 | 44% | 14,957 | 48% | 14,957 | 50% |
| ODS Client | 11,865 | 35% | 14,957 | 44% | 14,957 | 48% | 14,957 | 50% |
| Parking Management | (2,291) | (7%) | (2,031) | (6%) | (2,031) | (6%) | (2,031) | (7%) |
| Domestic Waste | 6,674 | 20% | 6,674 | 20% | 6,674 | 21% | 6,674 | 22% |
| Street Cleansing | 6,974 | 21% | 6,974 | 20% | 6,974 | 22% | 6,974 | 23% |
| Parks & Open Spaces | 4,281 | 13% | 4,281 | 13% | 4,281 | 14% | 4,281 | 14% |
| Pest Control | 312 | 1% | 312 | 1% | 312 | 1% | 312 | 1% |
| Engineering | 180 | 1% | 180 | 1% | 180 | 1% | 180 | 1% |
| Motor Transport | 632 | 2% | 464 | 1% | 464 | 1% | 464 | 2% |
| Overheads & Profit Share | (4,898) | (15%) | (1,898) | (6%) | (1,898) | (6%) | (1,898) | (6%) |

OXFORD CITY COUNCIL GENERAL FUND REVENUE BUDGET 2026/27 FOR CONSULTATION AND FUTURE YEAR CONTROL TOTALS - APPENDIX 1

| | Recommended Budget 2026/27 | | Proposed Budget 2027/28 | | Proposed Budget 2028/29 | | Proposed Budget 2029/30 | |
|----------------------------------------------------|---------------------------------------|-----------------------|------------------------------------|-----------------------|------------------------------------|-----------------------|------------------------------------|-----------------------|
| | £000's | % of Total | £000's | % of Total | £000's | % of Total | £000's | % of Total |
| | 7,875 | 24% | 7,779 | 23% | 7,759 | 25% | 7,759 | 26% |
| CORPORATE SERVICES | | | | | | | | |
| Corporate Communications | 203 | 1% | 203 | 1% | 193 | 1% | 193 | 1% |
| Communications | 203 | 1% | 203 | 1% | 193 | 1% | 193 | 1% |
| Financial Services | 5,278 | 16% | 5,203 | 15% | 5,203 | 17% | 5,203 | 17% |
| Accountancy | 385 | 1% | 385 | 1% | 385 | 1% | 385 | 1% |
| Corporate Finance | 297 | 1% | 297 | 1% | 297 | 1% | 297 | 1% |
| Investigations | 505 | 2% | 505 | 1% | 505 | 2% | 505 | 2% |
| Procurement & Payments | 172 | 1% | 137 | % | 137 | % | 137 | % |
| Revenues & Benefits | 3,688 | 11% | 3,688 | 11% | 3,688 | 12% | 3,688 | 12% |
| Incomes | 10 | % | (30) | (%) | (30) | (%) | (30) | (%) |
| Transformation Projects | 220 | 1% | 220 | 1% | 220 | 1% | 220 | 1% |
| Chief Executive | 60 | % | 60 | % | 60 | % | 60 | % |
| CEO & Directors | 60 | % | 60 | % | 60 | % | 60 | % |
| Law & Governance | 1,719 | 5% | 1,750 | 5% | 1,740 | 6% | 1,740 | 6% |
| Committees & Members Services | 72 | % | 63 | % | 53 | % | 53 | % |
| Election Services | 471 | 1% | 521 | 2% | 521 | 2% | 521 | 2% |
| Legal Services | 819 | 2% | 809 | 2% | 809 | 3% | 809 | 3% |
| Corporate Strategy | 186 | 1% | 186 | 1% | 186 | 1% | 186 | 1% |
| Policy & Partnerships | 57 | % | 57 | % | 57 | % | 57 | % |
| Executive Assistants | 113 | % | 113 | % | 113 | % | 113 | % |
| People | 615 | 2% | 563 | 2% | 563 | 2% | 563 | 2% |
| People | 615 | 2% | 563 | 2% | 563 | 2% | 563 | 2% |
| | | | | | | | | |
| Total Budget at Portfolio Level | 33,471 | 100% | 34,100 | 100% | 31,363 | 100% | 30,199 | 100% |
| | | | | | | | | |
| Below the line | | | | | | | | |
| Corporate Accounts | (5,251) | (16%) | (3,948) | (12%) | (2,420) | (7%) | (3,200) | (9%) |
| Contingencies | 5,512 | 17% | 4,864 | 15% | 6,278 | 19% | 8,015 | 24% |
| Total Expenditure Budget | 33,732 | 106% | 35,016 | 106% | 35,221 | 109% | 35,014 | 103% |
| | | | | | | | | |
| General Fund Working Balances | | | | | | | | |
| Transfer to / (from) General Fund Working Balances | | | | | | | | |
| Transfers to/(from) reserves | (1,787) | (6%) | (2,123) | (6%) | (2,826) | (9%) | (973) | (3%) |
| Net Budget Requirement | 31,945 | 100% | 32,894 | 100% | 32,396 | 100% | 34,041 | 100% |
| | | | | | | | | |
| Financed by | | | | | | | | |
| External Funding | (3,665) | (11%) | (3,560) | (11%) | (3,704) | (11%) | (3,704) | (11%) |
| Business Rates retention | (11,440) | (36%) | (10,922) | (33%) | (9,530) | (29%) | (10,394) | (31%) |
| New Homes Bonus | 0 | % | 0 | % | 0 | % | 0 | % |
| Funding Floor | 0 | % | 0 | % | 0 | % | 0 | % |
| Council tax | (17,954) | (56%) | (18,676) | (57%) | (19,426) | (60%) | (20,207) | (59%) |
| Less Parish Precept | 264 | 1% | 264 | 1% | 264 | 1% | 264 | 1% |
| Collection Fund Surplus | 0 | % | 0 | % | 0 | % | 0 | % |
| Business Rates Collection Fund (Surplus) / Deficit | 850 | 3% | 0 | % | 0 | % | 0 | % |
| | | | | | | | | |
| Over / (Under) Allocated budget | 0 | | (0) | | (0) | | 0 | |

| | Approved Budget 2025/26 £000's | In year Permanent Virements £000's | Current Budget 2025/26 £000's | MTFP assumptions £000's | Contractual Inflation £000's | Pressures £000's | Existing Efficiencies £000's | Invest to Save £000's | Fees & Charges £000's | New Investments / Bids £000's | Transformation & New Efficiencies £000's | Service Reductions £000's | Total App3 £000's | Recommended Budget 2026/27 £000's | % Change |
|--------------------------------------------------|--------------------------------------|---------------------------------------------|----------------------------------------|-------------------------------|------------------------------------|---------------------|------------------------------------|-----------------------------|-----------------------------|----------------------------------------|------------------------------------------------|---------------------------------|-------------------------|-----------------------------------------|---------------|
| CITY & CITIZENS SERVICES | 15,332 | 33 | 15,366 | 0 | 0 | 886 | 0 | 55 | (927) | 250 | (300) | (178) | (214) | 15,152 | -1.4% |
| Communities & Citizen Services | 6,998 | 33 | 7,031 | 0 | 0 | 116 | 0 | 0 | (927) | 136 | (255) | (178) | (1,108) | 5,923 | -15.8% |
| Business Support | 21 | 0 | 21 | | | | | | | | | | | 21 | 0.0% |
| Customer Services | 182 | 33 | 215 | | | | | | | | (255) | | | (40) | -118.7% |
| Leisure Management | 3,319 | 0 | 3,319 | | | | | | (839) | 136 | | | | 2,616 | -21.2% |
| Sport and Physical Activity | 316 | 0 | 316 | | | | | | | | | | | 316 | 0.0% |
| Community Centres | 1,257 | 0 | 1,257 | | | | | | (88) | | | (28) | | 1,141 | -9.2% |
| Youth Ambition | 251 | 0 | 251 | | | | | | | | | | | 251 | 0.0% |
| Culture | 510 | 0 | 510 | | | 116 | | | | | | (90) | | 536 | 5.1% |
| Localities Team | 1,130 | 0 | 1,130 | | | | | | | | | (60) | | 1,070 | -5.3% |
| Community Response | 12 | 0 | 12 | | | | | | | | | | | 12 | 0.0% |
| Business Intelligence | 0 | 0 | 0 | | | | | | | | | | | 0 | 0.0% |
| Housing Services | 7,181 | 0 | 7,181 | 0 | 0 | 770 | 0 | 55 | 0 | 69 | 0 | 0 | 894 | 8,075 | 12.4% |
| Strategy & Service Development | 688 | 481 | 1,169 | | | 3 | | | | | | | | 1,172 | 0.3% |
| Garages | 91 | 18 | 110 | | | | | | | | | | | 110 | 0.0% |
| Homelessness Prevention | 598 | 191 | 789 | | | 35 | | | | 35 | | | | 859 | 8.9% |
| Rapid Re-Housing | 4,209 | (768) | 3,440 | | | 717 | | 55 | | 34 | | | | 4,246 | 23.4% |
| Rough Sleeping & Singless Homelessness | 1,595 | 78 | 1,673 | | | 15 | | | | | | | | 1,688 | 0.9% |
| Community Safety | 1,154 | 0 | 1,154 | 0 | 0 | 0 | 0 | 0 | 0 | 45 | (45) | 0 | 0 | 1,154 | 0.0% |
| Community Safety | 1,154 | 0 | 1,154 | | | | | | | 45 | (45) | | | 1,154 | 0.0% |
| INFORMATION & TECHNOLOGY | 1,218 | 0 | 1,218 | 0 | 116 | 1,032 | 0 | 0 | 0 | 0 | (100) | 0 | 1,048 | 2,266 | |
| ICT | 1,218 | 0 | 1,218 | | 116 | 1,032 | | | | | (100) | | | 2,266 | 86.0% |
| PLACE | (3,411) | 0 | (3,411) | 0 | 0 | 1,718 | (208) | 0 | (1,520) | (125) | (140) | 0 | (275) | (3,686) | 8.1% |
| | | | 0 | | | | | | | | | | | | |
| Corporate Property | (8,756) | 0 | (8,756) | 0 | 0 | 1,643 | (208) | 0 | (1,532) | (125) | (166) | 0 | (388) | (9,144) | 4.4% |
| Property Services | 1,611 | 0 | 1,611 | | | 170 | | | | | (166) | | | 1,615 | 0.2% |
| Asset Management | (11,378) | 0 | (11,378) | | | 1,473 | (208) | | (1,532) | | | | | (11,645) | 2.3% |
| Transactions & Special Projects | 191 | 0 | 191 | | | | | | | (50) | | | | 141 | -26.1% |
| Town Hall and Facilities | (98) | 0 | (98) | | | | | | | | | | | (98) | 0.0% |
| Parks Development | 917 | 0 | 917 | | | | | | | (75) | | | | 842 | -8.2% |
| Economy Regeneration & Sustainability | 2,416 | 165 | 2,581 | 0 | 0 | 50 | 0 | 0 | 12 | 0 | 51 | 0 | 113 | 2,694 | 4.4% |
| Economic Development | 710 | 60 | 771 | | | 50 | | | | | | | | 821 | 6.5% |
| Development Team & PMO | 416 | (60) | 356 | | | | | | | | | | | 356 | 0.0% |
| Housing Supply | 104 | 0 | 104 | | | | | | | | | | | 104 | 0.0% |
| Environmental Quality | 201 | 165 | 366 | | | | | | 12 | | | | | 378 | 3.3% |
| Energy & Natural Resources | 465 | 0 | 465 | | | | | | | | | | | 465 | 0.0% |
| Smart, Sustainable Cities | 521 | 0 | 521 | | | | | | | | 51 | | | 572 | 9.8% |
| Planning & Regulatory Services | 2,929 | (165) | 2,764 | 0 | 0 | 25 | 0 | 0 | 0 | 0 | (25) | 0 | 0 | 2,764 | 0.0% |
| Development | (98) | (165) | (264) | | | | | | | | | | | (264) | 0.0% |
| Support Services | 376 | (60) | 316 | | | | | | | | (25) | | | 291 | -7.9% |
| Information Services | 19 | 0 | 19 | | | | | | | | | | | 19 | 0.0% |
| Spatial Development | 1,678 | (25) | 1,653 | | | | | | | | | | | 1,653 | 0.0% |
| Regulatory Services | 954 | 85 | 1,039 | | | 25 | | | | | | | | 1,064 | 2.4% |
| COMPANIES | 9,285 | 1,800 | 11,085 | 0 | 0 | 374 | 0 | 0 | 441 | (35) | 0 | 0 | 780 | 11,865 | 7.0% |
| ODS Client | 9,285 | 1,800 | 11,085 | 0 | 0 | 374 | 0 | 0 | 441 | (35) | 0 | 0 | 780 | 11,865 | 7.0% |
| Parking Management | (1,223) | 0 | (1,223) | | | | | | | (20) | | | | (2,291) | 87.3% |
| Domestic Waste | 4,764 | 1,750 | 6,514 | | | 160 | | | (1,048) | | | | | 6,674 | 2.5% |
| Street Cleansing | 6,837 | 33 | 6,870 | | | 119 | | | | (15) | | | | 6,974 | 1.5% |
| Parks & Open Spaces | 4,236 | 0 | 4,236 | | | 45 | | | | | | | | 4,281 | 1.1% |
| Pest Control | 312 | 0 | 312 | | | | | | | | | | | 312 | 0.0% |
| Engineering | 113 | 17 | 130 | | | 50 | | | | | | | | 180 | 0.0% |
| Motor Transport | 632 | 0 | 632 | | | | | | | | | | | 632 | 0.0% |
| Overheads & Profit Share | (6,387) | 0 | (6,387) | | | | | | 1,489 | | | | | (4,898) | -23.3% |
| CORPORATE SERVICES | 8,058 | (34) | 8,024 | 0 | 0 | 13 | (75) | (46) | (111) | 123 | (30) | (23) | (149) | 7,875 | -1.9% |
| Corporate Communications | 212 | (9) | 203 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 203 | |

OXFORD CITY COUNCIL REVENUE BUDGET AT PORTFOLIO LEVEL 2026/27

APPENDIX 2

| | Approved Budget 2025/26 £000's | In year Permanent Virements £000's | Current Budget 2025/26 £000's | MTFP assumptions £000's | Contractual Inflation £000's | Pressures £000's | Existing Efficiencies £000's | Invest to Save £000's | Fees & Charges £000's | New Investments / Bids £000's | Transformation & New Efficiencies £000's | Service Reductions £000's | Total App3 £000's | Recommended Budget 2026/27 £000's | % Change |
|----------------------------------------|--------------------------------------|---------------------------------------------|----------------------------------------|-------------------------------|------------------------------------|---------------------|------------------------------------|-----------------------------|-----------------------------|----------------------------------------|------------------------------------------------|---------------------------------|-------------------------|-----------------------------------------|---------------|
| Communications | 212 | (9) | 203 | | | | | | | | | | | 203 | 0.0% |
| Financial Services | 5,273 | 0 | 5,273 | 0 | 0 | 104 | (75) | 0 | (45) | 51 | (30) | 0 | 5 | 5,278 | 0.1% |
| Accountancy | 345 | 0 | 345 | | | 40 | | | | | | | | 385 | 11.6% |
| Corporate Finance | 263 | 0 | 263 | | | 34 | | | | | | | | 297 | 12.9% |
| Investigations | 499 | 0 | 499 | | | | | | (45) | 51 | | | | 505 | 1.2% |
| Procurement & Payments | 172 | 0 | 172 | | | | | | | | | | | 172 | 0.0% |
| Revenues & Benefits | 3,753 | 0 | 3,753 | | | 30 | (75) | | | | (20) | | | 3,688 | -1.7% |
| Incomes | 20 | 0 | 20 | | | | | | | | (10) | | | 10 | -50.3% |
| Transformation Projects | 220 | 0 | 220 | | | | | | | | | | | 220 | 0.0% |
| Chief Executive | 160 | 0 | 160 | 0 | 0 | (100) | 0 | 0 | 0 | 0 | 0 | 0 | (100) | 60 | -62.4% |
| CEO & Directors | 160 | 0 | 160 | | | (100) | | | | | | | | 60 | -62.4% |
| Law & Governance | 1,753 | (25) | 1,728 | 0 | 0 | 9 | 0 | 0 | (53) | 58 | 0 | (23) | (9) | 1,719 | -0.5% |
| Committees & Members Services | 68 | 0 | 68 | | | 4 | | | | | | | | 72 | 5.9% |
| Election Services | 521 | 0 | 521 | | | | | | (50) | | | | | 471 | -9.6% |
| Legal Services | 782 | 0 | 782 | | | 5 | | | (3) | 58 | | (23) | | 819 | 4.7% |
| Corporate Strategy | 186 | 0 | 186 | | | | | | | | | | | 186 | 0.0% |
| Policy & Partnerships | 82 | (25) | 57 | | | | | | | | | | | 57 | 0.0% |
| Executive Assistants | 113 | 0 | 113 | | | | | | | | | | | 113 | 0.0% |
| People | 660 | 0 | 660 | 0 | 0 | 0 | 0 | (46) | (13) | 14 | 0 | 0 | (45) | 615 | -6.8% |
| People | 660 | 0 | 660 | | | | | (46) | (13) | 14 | | | | 615 | -6.8% |
| Total Budget at Portfolio Level | 30,482 | 1,799 | 32,281 | 0 | 116 | 4,023 | (283) | 9 | (2,117) | 213 | (570) | (201) | 1,190 | 33,471 | 0 |

APPENDIX 2

| | Proposed Budget 2026/27 £000's | MTFP assumptions £000's | Contractual Inflation £000's | Pressures £000's | Existing Efficiencies £000's | Invest to Save £000's | Fees & Charges £000's | New Investments / Bids £000's | Transformation & New Efficiencies £000's | Service Reductions £000's | Total App3 £000's | Proposed Budget 2027/28 £000's | % Change |
|----------------------------------------|--------------------------------------|----------------------------|---------------------------------|---------------------|---------------------------------|--------------------------|--------------------------|----------------------------------|---------------------------------------------|------------------------------|----------------------|-----------------------------------|----------|
| CITY & CITIZENS SERVICES | 15,152 | 0 | 0 | (1,026) | 0 | (200) | (83) | (136) | 0 | (78) | (1,523) | 13,629 | -10.1% |
| Communities & Citizen Services | 5,923 | 0 | 0 | 0 | 0 | 0 | (83) | 16 | 0 | (78) | (145) | 5,778 | -2.4% |
| Business Support | 21 | | | | | | | | | | | 21 | 0.0% |
| Customer Services | (40) | | | | | | | | | | | (40) | 0.0% |
| Leisure Management | 2,616 | | | | | | (83) | (36) | | | | 2,497 | -4.5% |
| Sport and Physical Activity | 316 | | | | | | | | | | | 316 | 0.0% |
| Community Centres | 1,141 | | | | | | | | | (28) | | 1,113 | -2.5% |
| Youth Ambition | 251 | | | | | | | | | | | 251 | 0.0% |
| Culture | 536 | | | | | | | | | (50) | | 486 | -9.3% |
| Localities Team | 1,070 | | | | | | | | | | | 1,070 | 0.0% |
| Community Response | 12 | | | | | | | | | | | 12 | 0.0% |
| Business Intelligence | 0 | | | | | | | 52 | | | | 52 | |
| Housing Services | 8,075 | 0 | 0 | (1,026) | 0 | (200) | 0 | (152) | 0 | 0 | (1,378) | 6,697 | -17.1% |
| Strategy & Service Development | 1,172 | | | | | | | | | | | 1,172 | 0.0% |
| Garages | 110 | | | | | | | | | | | 110 | 0.0% |
| Homelessness Prevention | 859 | | | (100) | | | | | | | | 759 | -11.6% |
| Rapid Re-Housing | 4,246 | | | (926) | | (200) | | (152) | | | | 2,968 | -30.1% |
| Rough Sleeping & Singless Homelessness | 1,688 | | | | | | | | | | | 1,688 | 0.0% |
| Community Safety | 1,154 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1,154 | 0.0% |
| Community Safety | 1,154 | | | | | | | | | | | 1,154 | 0.0% |
| INFORMATION & TECHNOLOGY | 2,266 | 0 | 121 | (128) | 0 | 0 | 0 | 0 | (287) | 0 | (294) | 1,972 | 1,391 |
| ICT | 2,266 | | 121 | (128) | | | | | (287) | | | 1,972 | -13.0% |
| PLACE | (3,686) | 0 | 0 | (190) | (110) | 0 | (244) | (180) | 174 | 0 | (550) | (4,236) | 14.9% |
| Corporate Property | (9,144) | 0 | 0 | 0 | (110) | 0 | (244) | (180) | 0 | 0 | (534) | (9,678) | 5.8% |
| Property Services | 1,615 | | | | | | | | | | | 1,615 | 0.0% |
| Asset Management | (11,645) | | | | (110) | | (244) | | | | | (11,999) | 3.0% |
| Transactions & Special Projects | 141 | | | | | | | | | | | 141 | 0.0% |
| Town Hall and Facilities | (98) | | | | | | | | | | | (98) | 0.0% |
| Parks Development | 842 | | | | | | | (180) | | | | 662 | -21.4% |
| Economy Regeneration & Sustainability | 2,694 | 0 | 0 | (190) | 0 | 0 | 0 | 0 | 199 | 0 | 9 | 2,703 | 0.3% |
| Economic Development | 821 | | | (165) | | | | | | | | 656 | -20.1% |
| Development Team & PMO | 356 | | | | | | | | | | | 356 | 0.0% |
| Housing Supply | 104 | | | | | | | | | | | 104 | 0.0% |
| Environmental Quality | 378 | | | | | | | | 210 | | | 588 | 55.6% |
| Energy & Natural Resources | 465 | | | (25) | | | | | 25 | | | 465 | 0.0% |
| Smart, Sustainable Cities | 572 | | | | | | | | (36) | | | 536 | -6.3% |
| Planning & Regulatory Services | 2,764 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | (25) | 0 | (25) | 2,739 | -0.9% |
| Development | (264) | | | | | | | | | | | (264) | 0.0% |
| Support Services | 291 | | | | | | | | (25) | | | 266 | -8.6% |
| Information Services | 19 | | | | | | | | | | | 19 | 0.0% |
| Spatial Development | 1,653 | | | | | | | | | | | 1,653 | 0.0% |
| Regulatory Services | 1,064 | | | | | | | | | | | 1,064 | 0.0% |
| COMPANIES | 11,865 | 0 | 0 | (168) | 0 | 0 | 3,260 | 0 | 0 | 0 | 3,092 | 14,957 | 26.1% |
| ODS Client | 11,865 | 0 | 0 | (168) | 0 | 0 | 3,260 | 0 | 0 | 0 | 3,092 | 14,957 | 26.1% |
| Parking Management | (2,291) | | | | | | 260 | | | | | (2,031) | -11.3% |
| Domestic Waste | 6,674 | | | | | | | | | | | 6,674 | 0.0% |
| Street Cleansing | 6,974 | | | | | | | | | | | 6,974 | 0.0% |

OXFORD CITY COUNCIL REVENUE BUDGET AT PORTFOLIO LEVEL 2027/28

APPENDIX 2

| | Proposed Budget 2026/27 £000's | MTFP assumptions £000's | Contractual Inflation £000's | Pressures £000's | Existing Efficiencies £000's | Invest to Save £000's | Fees & Charges £000's | New Investments / Bids £000's | Transformation & New Efficiencies £000's | Service Reductions £000's | Total App3 £000's | Proposed Budget 2027/28 £000's | % Change |
|----------------------------------------|-----------------------------------|----------------------------|---------------------------------|---------------------|---------------------------------|--------------------------|--------------------------|----------------------------------|---------------------------------------------|------------------------------|----------------------|-----------------------------------|--------------|
| Parks & Open Spaces | 4,281 | | | | | | | | | | | 4,281 | 0.0% |
| Pest Control | 312 | | | | | | | | | | | 312 | 0.0% |
| Engineering | 180 | | | | | | | | | | | 180 | 0.0% |
| Motor Transport | 632 | | | (168) | | | | | | | | 464 | -26.6% |
| Overheads & Profit Share | (4,898) | | | | | | 3,000 | | | | | (1,898) | -61.3% |
| CORPORATE SERVICES | 7,875 | 0 | 0 | 4 | (35) | (52) | 50 | 0 | (40) | (23) | (96) | 7,779 | -1.2% |
| Corporate Communications | 203 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 203 | |
| Communications | 203 | | | | | | | | | | | 203 | 0.0% |
| Financial Services | 5,278 | 0 | 0 | 0 | (35) | 0 | 0 | 0 | (40) | 0 | (75) | 5,203 | -1.4% |
| Accountancy | 385 | | | | | | | | | | | 385 | 0.0% |
| Corporate Finance | 297 | | | | | | | | | | | 297 | 0.0% |
| Investigations | 505 | | | | | | | | | | | 505 | 0.0% |
| Procurement & Payments | 172 | | | | (35) | | | | | | | 137 | -20.3% |
| Revenues & Benefits | 3,688 | | | | | | | | | | | 3,688 | 0.0% |
| Incomes | 10 | | | | | | | | (40) | | | (30) | -404.9% |
| Transformation Projects | 220 | | | | | | | | | | | 220 | 0.0% |
| Chief Executive | 60 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 60 | 0.0% |
| CEO & Directors | 60 | | | | | | | | | | | 60 | 0.0% |
| Law & Governance | 1,719 | 0 | 0 | 4 | 0 | 0 | 50 | 0 | 0 | (23) | 31 | 1,750 | 1.8% |
| Committees & Members Services | 72 | | | 4 | | | | | | (13) | | 63 | -12.4% |
| Election Services | 471 | | | | | | 50 | | | | | 521 | 10.6% |
| Legal Services | 819 | | | | | | | | | (10) | | 809 | -1.2% |
| Corporate Strategy | 186 | | | | | | | | | | | 186 | 0.0% |
| Policy & Partnerships | 57 | | | | | | | | | | | 57 | 0.0% |
| Executive Assistants | 113 | | | | | | | | | | | 113 | 0.0% |
| People | 615 | 0 | 0 | 0 | 0 | (52) | 0 | 0 | 0 | 0 | (52) | 563 | |
| People | 615 | | | | | (52) | | | | | | 563 | -8.5% |
| | | | | | | | | | | | | | |
| Total Budget at Portfolio Level | 33,471 | 0 | 121 | (1,508) | (145) | (252) | 2,983 | (316) | (153) | (101) | 629 | 34,100 | 1.9% |

[illegible]

| | Proposed Budget 2027/28 £000's | MTFP assumptions £000's | Contractual Inflation £000's | Pressures £000's | Existing Efficiencies £000's | Invest to Save £000's | Fees & Charges £000's | New Investments / Bids £000's | Transformation & New Efficiencies £000's | Service Reductions £000's | Total App3 £000's | Proposed Budget 2028/29 £000's | % Change |
|----------------------------------------|-----------------------------------------|-------------------------------|------------------------------------|---------------------|------------------------------------|-----------------------------|-----------------------------|----------------------------------------|------------------------------------------------|---------------------------------|-------------------------|-----------------------------------------|--------------|
| Parking Management | (2,031) | | | | | | | | | | | (2,031) | 0.0% |
| Domestic Waste | 6,674 | | | | | | | | | | | 6,674 | 0.0% |
| Street Cleansing | 6,974 | | | | | | | | | | | 6,974 | 0.0% |
| Parks & Open Spaces | 4,281 | | | | | | | | | | | 4,281 | 0.0% |
| Pest Control | 312 | | | | | | | | | | | 312 | 0.0% |
| Engineering | 180 | | | | | | | | | | | 180 | 0.0% |
| Motor Transport | 464 | | | | | | | | | | | 464 | 0.0% |
| Overheads & Profit Share | (1,898) | | | | | | | | | | | (1,898) | 0.0% |
| CORPORATE SERVICES | 7,779 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | (20) | (20) | 7,759 | -0.3% |
| Corporate Communications | 203 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | (10) | (10) | 193 | -4.9% |
| Communications | 203 | | | | | | | | | (10) | (10) | 193 | -4.9% |
| Financial Services | 5,203 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 5,203 | 0.0% |
| Accountancy | 385 | | | | | | | | | | | 385 | 0.0% |
| Corporate Finance | 297 | | | | | | | | | | | 297 | 0.0% |
| Investigations | 505 | | | | | | | | | | | 505 | 0.0% |
| Procurement & Payments | 137 | | | | | | | | | | | 137 | 0.0% |
| Revenues & Benefits | 3,688 | | | | | | | | | | | 3,688 | 0.0% |
| Incomes | (30) | | | | | | | | | | | (30) | 0.0% |
| Transformation Projects | 220 | | | | | | | | | | | 220 | 0.0% |
| Chief Executive | 60 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 60 | 0.0% |
| CEO & Directors | 60 | | | | | | | | | | | 60 | 0.0% |
| Law & Governance | 1,750 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | (10) | (10) | 1,740 | -0.6% |
| Committees & Members Services | 63 | | | | | | | | | (10) | (10) | 53 | -15.8% |
| Election Services | 521 | | | | | | | | | | | 521 | 0.0% |
| Legal Services | 809 | | | | | | | | | | | 809 | 0.0% |
| Corporate Strategy | 186 | | | | | | | | | | | 186 | 0.0% |
| Policy & Partnerships | 57 | | | | | | | | | | | 57 | 0.0% |
| Executive Assistants | 113 | | | | | | | | | | | 113 | 0.0% |
| People | 563 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 563 | 0.0% |
| People | 563 | | | | | | | | | | | 563 | 0.0% |
| Total Budget at Portfolio Level | 34,100 | 0 | 126 | (50) | (190) | (125) | (2,248) | (106) | (52) | (92) | (2,737) | 31,363 | -8.0% |

| | Proposed Budget 2028/29 £000's | MTFP assumptions £000's | Contractual Inflation £000's | Pressures £000's | Existing Efficiencies £000's | Invest to Save £000's | Fees & Charges £000's | New Investments / Bids £000's | Transformation & New Efficiencies £000's | Service Reductions £000's | Total App3 £000's | Proposed Budget 2029/30 £000's | % Change |
|----------------------------------------|--------------------------------------|-------------------------------|------------------------------------|---------------------|------------------------------------|-----------------------------|-----------------------------|----------------------------------------|------------------------------------------------|---------------------------------|-------------------------|--------------------------------------|-------------|
| CITY & CITIZENS SERVICES | 13,237 | 0 | 0 | 0 | 0 | 0 | (68) | 90 | 0 | 0 | 22 | 13,259 | 0.2% |
| Communities & Citizen Services | 5,442 | 0 | 0 | 0 | 0 | 0 | (68) | 0 | 0 | 0 | (68) | 5,374 | -1.2% |
| Business Support | 21 | | | | | | | | | | | 21 | 0.0% |
| Customer Services | (40) | | | | | | | | | | | (40) | 0.0% |
| Leisure Management | 2,233 | | | | | | (68) | | | | | 2,165 | -3.0% |
| Sport and Physical Activity | 316 | | | | | | | | | | | 316 | 0.0% |
| Community Centres | 1,085 | | | | | | | | | | | 1,085 | 0.0% |
| Youth Ambition | 251 | | | | | | | | | | | 251 | 0.0% |
| Culture | 486 | | | | | | | | | | | 486 | 0.0% |
| Localities Team | 1,026 | | | | | | | | | | | 1,026 | 0.0% |
| Community Response | 12 | | | | | | | | | | | 12 | 0.0% |
| Business Intelligence | 52 | | | | | | | | | | | 52 | 0.0% |
| Housing Services | 6,641 | 0 | 0 | 0 | 0 | 0 | 0 | 90 | 0 | 0 | 90 | 6,731 | 1.4% |
| Strategy & Service Development | 1,172 | | | | | | | | | | | 1,172 | 0.0% |
| Garages | 110 | | | | | | | | | | | 110 | 0.0% |
| Homelessness Prevention | 759 | | | | | | | | | | | 759 | 0.0% |
| Rapid Re-Housing | 2,912 | | | | | | | 90 | | | | 3,002 | 3.1% |
| Rough Sleeping & Singless Homelessness | 1,688 | | | | | | | | | | | 1,688 | 0.0% |
| Community Safety | 1,154 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1,154 | 0.0% |
| Community Safety | 1,154 | | | | | | | | | | | 1,154 | 0.0% |
| INFORMATION & TECHNOLOGY | 2,098 | 0 | 131 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 131 | 2,229 | 6.2% |
| ICT | 2,098 | | 131 | | | | | | | | | 2,229 | 6.2% |
| PLACE | (6,687) | 0 | 0 | (125) | (10) | 0 | (1,269) | 0 | 87 | 0 | (1,317) | (8,004) | 19.7% |
| Corporate Property | (12,077) | 0 | 0 | (125) | (10) | 0 | (1,269) | 0 | 0 | 0 | (1,404) | (13,481) | 11.6% |
| Property Services | 1,435 | | | | | | | | | | | 1,435 | 0.0% |
| Asset Management | (14,218) | | | (125) | (10) | | (1,269) | | | | | (15,622) | 9.9% |
| Transactions & Special Projects | 141 | | | | | | | | | | | 141 | 0.0% |
| Town Hall and Facilities | (98) | | | | | | | | | | | (98) | 0.0% |
| Parks Development | 662 | | | | | | | | | | | 662 | 0.0% |
| Economy Regeneration & Sustainability | 2,666 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 87 | 0 | 87 | 2,753 | 3.3% |
| Economic Development | 656 | | | | | | | | | | | 656 | 0.0% |
| Development Team & PMO | 356 | | | | | | | | | | | 356 | 0.0% |
| Housing Supply | 104 | | | | | | | | | | | 104 | 0.0% |
| Environmental Quality | 588 | | | | | | | | | | | 588 | 0.0% |
| Energy & Natural Resources | 465 | | | | | | | | | | | 465 | 0.0% |
| Smart, Sustainable Cities | 499 | | | | | | | | 87 | | | 586 | 17.4% |
| Planning & Regulatory Services | 2,724 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 2,724 | 0.0% |
| Development | (264) | | | | | | | | | | | (264) | 0.0% |
| Support Services | 251 | | | | | | | | | | | 251 | 0.0% |
| Information Services | 19 | | | | | | | | | | | 19 | 0.0% |
| Spatial Development | 1,653 | | | | | | | | | | | 1,653 | 0.0% |
| Regulatory Services | 1,064 | | | | | | | | | | | 1,064 | 0.0% |
| COMPANIES | 14,957 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 14,957 | 0.0% |
| ODS Client | 14,957 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 14,957 | 0.0% |
| Parking Management | (2,031) | | | | | | | | | | | (2,031) | 0.0% |
| Domestic Waste | 6,674 | | | | | | | | | | | 6,674 | 0.0% |
| Street Cleansing | 6,974 | | | | | | | | | | | 6,974 | 0.0% |

OXFORD CITY COUNCIL REVENUE BUDGET AT PORTFOLIO LEVEL 2029/30

APPENDIX 2

| | Proposed Budget 2028/29 £000's | MTFP assumptions £000's | Contractual Inflation £000's | Pressures £000's | Existing Efficiencies £000's | Invest to Save £000's | Fees & Charges £000's | New Investments / Bids £000's | Transformation & New Efficiencies £000's | Service Reductions £000's | Total App3 £000's | Proposed Budget 2029/30 £000's | % Change |
|----------------------------------------|-----------------------------------|----------------------------|---------------------------------|---------------------|---------------------------------|--------------------------|--------------------------|----------------------------------|---------------------------------------------|------------------------------|----------------------|-----------------------------------|--------------|
| Parks & Open Spaces | 4,281 | | | | | | | | | | | 4,281 | 0.0% |
| Pest Control | 312 | | | | | | | | | | | 312 | 0.0% |
| Engineering | 180 | | | | | | | | | | | 180 | 0.0% |
| Motor Transport | 464 | | | | | | | | | | | 464 | 0.0% |
| Overheads & Profit Share | (1,898) | | | | | | | | | | | (1,898) | 0.0% |
| CORPORATE SERVICES | 7,759 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 7,759 | 0.0% |
| Corporate Communications | 193 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 193 | 0.0% |
| Communications | 193 | | | | | | | | | | | 193 | 0.0% |
| Financial Services | 5,203 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 5,203 | 0.0% |
| Accountancy | 385 | | | | | | | | | | | 385 | 0.0% |
| Corporate Finance | 297 | | | | | | | | | | | 297 | 0.0% |
| Investigations | 505 | | | | | | | | | | | 505 | 0.0% |
| Procurement & Payments | 137 | | | | | | | | | | | 137 | 0.0% |
| Revenues & Benefits | 3,688 | | | | | | | | | | | 3,688 | 0.0% |
| Incomes | (30) | | | | | | | | | | | (30) | 0.0% |
| Transformation Projects | 220 | | | | | | | | | | | 220 | 0.0% |
| Chief Executive | 60 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 60 | 0.0% |
| CEO & Directors | 60 | | | | | | | | | | | 60 | 0.0% |
| Law & Governance | 1,740 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1,740 | 0.0% |
| Committees & Members Services | 53 | | | | | | | | | | | 53 | 0.0% |
| Election Services | 521 | | | | | | | | | | | 521 | 0.0% |
| Legal Services | 809 | | | | | | | | | | | 809 | 0.0% |
| Corporate Strategy | 186 | | | | | | | | | | | 186 | 0.0% |
| Policy & Partnerships | 57 | | | | | | | | | | | 57 | 0.0% |
| Executive Assistants | 113 | | | | | | | | | | | 113 | 0.0% |
| People | 563 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 563 | 0.0% |
| People | 563 | | | | | | | | | | | 563 | 0.0% |
| Total Budget at Portfolio Level | 31,363 | 0 | 131 | (125) | (10) | 0 | (1,337) | 90 | 87 | 0 | (1,164) | 30,199 | -3.7% |

Communities & Citizens Services

Proposal

H/M/L

2026-27
£000s2027-28
£000s2028-29
£000s2029-30
£000s

2026-27

2027-28

2028-29

2029-30

Total

Contractual Inflation

Total Contractual Inflation

Pressures

| | | |
|---|---------|--------------------------|
| 1 | Museum | Grants Budget adjustment |
| 2 | Culture | Increase events staffing |
| | | |
| | | |

| | | | | | | | | | |
|-----|--|--|--|--|------|--|--|--|------|
| 66 | | | | | | | | | |
| 50 | | | | | 1.00 | | | | 1.00 |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| 116 | | | | | 1.00 | | | | 1.00 |

Total Pressures

Existing Efficiencies

Total Existing Efficiencies

Invest to Save

Total Invest to Save

Fees and Charges

| | | |
|---|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 3 | Community Centres | Recovering Covid related loss in room hire income - (Total Approved budget for Community Centre Income 25-26 £364k, of this Hire of Room & Buildings £154k) |
| 4 | Leisure Management | Leisure Contract Management fee profile |

| | | | | | | | | | |
|-------|------|-------|------|--|--|--|--|--|--|
| (88) | | | | | | | | | |
| (839) | (83) | (264) | (68) | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| (927) | (83) | (264) | (68) | | | | | | |

Total Fees and Charges

New Investments / Bids

| | | |
|---|-----------------------|--------------------------------------------------------------------------|
| 5 | Business Intelligence | Additional Corporate Data Analyst - required for LGR work in particular |
| 6 | Leisure | Active Oxfordshire, Contribution to Health & Physical Exercise Programme |

| | | | | | | | | | |
|----|------|--|--|--|------|--|--|--|------|
| | 52 | | | | 1.00 | | | | 1.00 |
| 36 | (36) | | | | | | | | 0.00 |

Communities & Citizens Services

| Proposal | | H/M/L | 2026-27 £000s | 2027-28 £000s | 2028-29 £000s | 2029-30 £000s | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
|------------------------------------------------------|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|------------------|------------------|------------------|---------|---------|---------|---------|--------|
| 7 | Leisure Contract | New creche in Blackbird Leys | 37 | | | | | | | | 0.00 |
| 8 | Leisure Contract | Extended opening hours at Hinksey Pool | 63 | | | | | | | | 0.00 |
| Total New Investment/Bids | | | 136 | 16 | | | 1.00 | | | | 1.00 |
| Transformations & New Efficiencies | | | | | | | | | | | |
| 9 | Contact Centre | Savings from Customer Experience change programme. Staff savings expected from customers self-serving rather than calling contact centre or visiting Westgate. Improvements from implementing Tenant's portal, new Housing Application form and process and promotion of Revenues and Benefits online forms and portal, and migration of claimants to Universal Credit. | (55) | | | | (2.00) | | | | (2.00) |
| 10 | Change programme | Savings from Customer Experience programme | (200) | | | | | | | | |
| Total Transformations | | | (255) | | | | (2.00) | | | | (2.00) |
| Service Reductions | | | | | | | | | | | |
| 11 | Community Centres | Community Centre phased move to business basis | (28) | (28) | (28) | | | | | | |
| 12 | Culture | Commercial events income (current base £160k 25/26) net of additional £50k for 1 post | (40) | (50) | | | | | | | |
| 13 | Localities Team | Explore the funding of localities management | (60) | | | | (1.00) | | | | (1.00) |
| 14 | Culture | International links (push back from 25/26 to 26/27) | (50) | | | | (1.00) | | | | (1.00) |
| 15 | Localities Team | Reduction in voluntary sector grants | | | (44) | | | | | | |
| Total Service Reductions | | | (178) | (78) | (72) | | (2.00) | | | | (2.00) |
| Total Communities & Citizens Services Bids & Savings | | | (1,108) | (145) | (336) | (68) | (3.00) | 1.00 | | | (2.00) |

Amended Bids & Savings

New Bids & Savings

General Fund Budget Proposals Summary
2026-27 to 2029-30

Amended Bids & Savings
New Bids & Savings

Check:

| 2026/27 | 2026/27 | | | | | | | | | | | | | | | | Original | Additional | | |
|----------------------------------------|-----------------------|-------|-----------|-------|-----------------------|-------|----------------|--------|----------------|-------|---------------------|-------|---------------------------------|-------|--------------------|-------|-----------------|-------------------|---------|----------------|
| Service Area: | Contractual Inflation | | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/Bids | | Transformation & New Efficiency | | Service Reductions | | Total Variation | Cumulative effect | Figures | (Savings/Bids) |
| | £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 | FTE's | £000's | £000's | | £000's |
| Communities & Citizen Services | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Housing Services | 0 | 770 | 0.00 | 0 | 0 | 0 | 55 | 0.00 | 0 | 0.00 | 69 | 1.00 | 0 | 0.00 | 0 | 0 | 0 | 894 | 894 | 168 |
| Community Safety | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Information & Technology | 116 | 1,032 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1,048 | 1,048 | 0 | 769 |
| Corporate Property | 0 | 1,643 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1,643 | 1,643 | 0 | 0 |
| Economy, Regeneration & Sustainability | 0 | 100 | (2.00) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 163 | 163 | 27 | 136 |
| Planning & Regulatory Services | 0 | 25 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 25 | 25 | 0 | 0 |
| Orford Direct Services | 0 | 324 | 1.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 720 | 720 | 2,860 | (2,130) |
| Corporate Communications | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Financial Services | 0 | 9 | 0.00 | (75) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 5 | 5 | 0 | 0 |
| Law & Governance | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Chief Executive | 0 | (100) | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 100 | (100) | 0 | 0 |
| People | 0 | 0 | 0.00 | 0 | 0 | 0 | (46) | (0.50) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | (46) | (46) | 0 | (163) |
| Total | 116 | 4,023 | 3 | (283) | 0 | 0 | 0 | 0 | 0 | 213 | 0 | (676) | (8) | (201) | 0 | 1,190 | 1,190 | 0 | 0 | (163) |

| 2027/28 | | | | | | | | | | | | | | | | | | | 2027/28 | |
|----------------------------------------|-----------------------|---------|-----------|-------|-----------------------|--------|----------------|-------|----------------|-------|---------------------|-------|---------------------------------|-------|--------------------|-------|-----------------|-------------------|------------------|-------------------------|
| Service Area: | Contractual Inflation | | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/Bids | | Transformation & New Efficiency | | Service Reductions | | Total Variation | Cumulative effect | Original Figures | Additional Savings/Bids |
| | £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 | £000's | £000's | £000's |
| Communities & Citizen Services | 0 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0 | 0 | 0 |
| Housing Services | 0 | (1,208) | 0 | 0.00 | 0 | 0.00 | (200) | 0.00 | 0 | 0.00 | (152) | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | (1,360) | 0 | 16 |
| Community Safety | 0 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0 | 0 | 178 |
| Information & Technology | 121 | (128) | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (287) | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | (294) | 75 | (294) |
| Corporate Property | 0 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (244) | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | (244) | 0 | 159 |
| Economy, Regeneration & Sustainability | 0 | (190) | (2.00) | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 172 | 0 | (14) |
| Planning & Regulatory Services | 0 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0 | 0 | 0 |
| Orford Direct Services | 0 | (98) | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 3,092 | 3,622 | 0 |
| Corporate Communications | 0 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0 | 0 | 0 |
| Financial Services | 0 | 0 | 0 | 0.00 | (35) | (1.00) | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 798 | 798 | 0 |
| Law & Governance | 0 | 4 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (60) | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 31 | 0 | 0 |
| Chief Executive | 0 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0 | 0 | 0 |
| People | 0 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0 | 0 | 0 |
| Total | 121 | (1,608) | (2) | (145) | (1) | (252) | (1) | 2,983 | 0 | (316) | 1 | (153) | (6) | (101) | 0 | 628 | 0 | 1,820 | 0 | 1,868 |

| 2028/29 | Contractual Inflation | | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/Bids | | Transformation & New Efficiency | | Service Reductions | | Total Variation | Cumulative effect | Original Figures | 2028/29 |
|----------------------------------------|-----------------------|--------|-----------|--------|-----------------------|--------|----------------|---------|----------------|--------|---------------------|--------|---------------------------------|--------|--------------------|---------|-----------------|-------------------|------------------|----------------|
| Service Area: | £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 | £000's | £000's | Figures | (Savings)/Bids |
| Communities & Citizen Services | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0.00 | (264) | 0 | 0 | 0 | 0 | 0 | 0 | (75) | 0 | 0 | (236) | (1,589) |
| Housing Services | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0.00 | (708) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | (166) | (336) |
| Community Safety | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0 | 0 | (200) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Information Technology | 128 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 128 | 0 |
| Corporate Property | 0 | (100) | (7.00) | (190) | (2.00) | (125) | 0.00 | (1,984) | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | (2,399) | (3,321) | (2,754) | 355 |
| Economy, Regeneration & Sustainability | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0.00 | (1) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 37 | 0 | (17) | 0 |
| Planning & Regulatory Services | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | (15) | 0 | 0 | (16) | 0 |
| Orford Services | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 1,440 | 0 |
| Corporate Communications | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | (10) | 0 | (10) | 0 |
| Financial Services | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Law & Governance | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | (10) | 0 | 0 | (10) | 0 |
| Chief Executive | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| People | 0 | 0 | 0.00 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Total | 128 | (50) | (7) | (189) | (2) | (125) | 0 | (2,248) | 0 | (196) | (5) | (52) | 0 | (92) | 0 | (2,727) | (2,727) | (1,917) | (1,855) | (1,188) |

| Service Area | Contractual Inflation | | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/Bids | | Transformation & New Efficiency | | Service Reductions | | Total Variation | Cumulative effect | Original £000's | Additional £000's |
|----------------------------------------|-----------------------|--------|-----------|--------|-----------------------|--------|----------------|--------|----------------|--------|---------------------|--------|---------------------------------|--------|--------------------|--------|-----------------|-------------------|--------------------|----------------------|
| | £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 | £000's | | | |
| | £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 | | | | |
| Communities & Citizen Services | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (86) | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (86) | 0 | (86) |
| Housing Services | 0 | 0 | 0.00 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 90 | 0 | 90 |
| Community Safety | 0 | 0 | 0.00 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0 | 0 |
| Information & Technology | 131 | 0 | 0.00 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 131 | 0 | 131 |
| Corporate Property | 0 | (125) | 0.00 | (10) | 0.00 | 0 | 0.00 | 0 | (1,269) | 0.00 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (1,404) | (1,429) | (1,404) |
| Economy, Regeneration & Sustainability | 0 | 0 | 0.00 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 87 | 0 | 87 |
| Planning & Regulatory Services | 0 | 0 | 0.00 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0 | 0 |
| Orford Direct Services | 0 | 0 | 0.00 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 3,822 | 0 | 3,822 |
| Corporate Communications | 0 | 0 | 0.00 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0 | 0 |
| Financial Services | 0 | 0 | 0.00 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0 | 0 |
| Law & Governance | 0 | 0 | 0.00 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0 | 0 |
| Chief Executive | 0 | 0 | 0.00 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0 | 0 |
| People | 0 | 0 | 0.00 | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0 | 0 |
| Total | 131 | (125) | 0 | (10) | 0 | 0 | 0 | 0 | (1,337) | 0 | 90 | 0 | 97 | 3 | 0 | 0 | (1,164) | (2,081) | 0 | (1,161) |

| Total Summary | | | | | | | | | | | | | | | | | | | | |
|----------------------------------------|-----------------------|-------|-----------|-------|-----------------------|-------|----------------|---------|----------------|-------|---------------------|-------|---------------------------------|-------|--------------------|---------|-----------------|-------------------|------------------|--------------|
| Service Area: | Contractual Inflation | | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/Bids | | Transformation & New Efficiency | | Service Reductions | | Total Variation | Cumulative effect | Original Figures | Savings/Bids |
| | £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 | FTE's | £000's | £000's | | |
| Communities & Citizen Services | 0 | 0 | 116 | 1.00 | 0 | 0 | 0 | 0 | 0 | 0 | 1,342 | 0.00 | 152 | 1.00 | 125 | 2.00 | (238) | 1,647 | 1,647 | 150 |
| Housing Services | 0 | (206) | 0.00 | 0 | 0 | 0 | (148) | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | (148) | 48 |
| Community Safety | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 45 | 4.00 | 0 | 0 | 0 | 0 | 0 | 0 |
| Information & Technology | 495 | 904 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Corporate Property | 0 | 1,418 | (6.00) | (618) | (2.00) | (125) | 0.00 | (5,029) | 0.00 | (305) | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Economy, Regeneration & Sustainability | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Planning & Regulatory Services | 0 | 25 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Orford Direct Services | 0 | 156 | 1.00 | 0 | 0 | 0 | 0 | 0 | 0 | 3,701 | 0.00 | (30) | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Corporate Communications | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Financial Services | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Law & Governance | 0 | 13 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Chief Executive | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| People | 0 | 0 | 0 | 0.00 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |
| Total | 495 | 2,340 | (6) | (628) | (3) | (368) | (1) | (2,139) | 0 | (119) | 5 | (668) | (11) | (394) | (2) | (2,081) | 12 | | (2,874) | 793 |

| Cumulative MTFP Position | | | | |
|-----------------------------------|--------------|--------------|--------------|----------------|
| 2026/27 | 2027/28 | 2028/29 | 2029/30 | |
| £'000s | £'000s | £'000s | £'000s | |
| Contractual Inflation | 1,166 | 2,316 | 3,641 | 4,955 |
| Pressures | 1,023 | 2,258 | 2,465 | 2,340 |
| Efficiency Efficiencies | (263) | (426) | (810) | (623) |
| Invest to Save | 9 | 243 | 20 | 10 |
| Exits And Charges | (2,117) | 866 | (1,382) | (2,719) |
| New Investments/Refunds | 213 | (103) | (209) | (119) |
| Transformation & New Efficiencies | (310) | (723) | (775) | (685) |
| Service Reductions | (201) | (352) | (394) | (394) |
| Total | 1,190 | 1,820 | (817) | (2,081) |

Communities & Citizen Services Budget Proposals Summary
2026-27 to 2029-30

2026/27

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/ Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Communities & Citizens Services | 0 | 116 | 1.00 | 0 | 0.00 | 0 | 0.00 | (927) | 0.00 | 136 | 0.00 | (255) | (2.00) | (178) | (2.00) | (1,108) |
| Housing Services | 0 | 770 | 0.00 | 0 | 0.00 | 55 | 0.00 | 0 | 0.00 | 69 | 1.00 | 0 | 0.00 | 0 | 0.00 | 894 |
| Community Safety | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 45 | 6.00 | (45) | (1.00) | 0 | 0.00 | 0 |
| Total | 0 | 886 | 1.00 | 0 | 0.00 | 55 | 0.00 | (927) | 0.00 | 250 | 7.00 | (300) | (3.00) | (178) | (2.00) | (214) |

2027/28

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/ Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Communities & Citizens Services | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (83) | 0.00 | 16 | 1.00 | 0 | 0.00 | (78) | 0.00 | (145) |
| Housing Services | 0 | (1,026) | 0.00 | 0 | 0.00 | (200) | 0.00 | 0 | 0.00 | (152) | 0.00 | 0 | 0.00 | 0 | 0.00 | (1,378) |
| Community Safety | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 |
| Total | 0 | (1,026) | 0.00 | 0 | 0.00 | (200) | 0.00 | (83) | 0.00 | (136) | 1.00 | 0 | 0.00 | (78) | 0.00 | (1,523) |

2028/29

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/ Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Communities & Citizens Services | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (264) | 0.00 | 0 | 0.00 | 0 | 0.00 | (72) | 0.00 | (336) |
| Housing Services | 0 | 50 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (106) | (3.00) | 0 | 0.00 | 0 | 0.00 | (56) |
| Community Safety | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | (2.00) | 0 | 0.00 | 0 | 0.00 | 0 |
| Total | 0 | 50 | 0.00 | 0 | 0.00 | 0 | 0.00 | (264) | 0.00 | (106) | (5.00) | 0 | 0.00 | (72) | 0.00 | (392) |

2029/30

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/ Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Communities & Citizens Services | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (68) | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (68) |
| Housing Services | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 90 | 0.00 | 0 | 0.00 | 0 | 0.00 | 90 |
| Community Safety | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 |
| Total | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (68) | 0.00 | 90 | 0.00 | 0 | 0.00 | 0 | 0.00 | 22 |

Total Summary

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/ Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Communities & Citizens Services | 0 | 116 | 1 | 0 | 0 | 0 | 0 | (1,342) | 0 | 152 | 1 | (255) | (2) | (328) | (2) | (1,657) |
| Housing Services | 0 | (206) | 0 | 0 | 0 | (145) | 0 | 0 | 0 | (99) | (2) | 0 | 0 | 0 | 0 | (450) |
| Community Safety | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 45 | 4 | (45) | (1) | 0 | 0 | 0 |
| Total | 0 | (90) | 1.00 | 0 | 0.00 | (145) | 0.00 | (1,342) | 0.00 | 98 | 3.00 | (300) | (3.00) | (328) | (2.00) | (2,107) |

Housing Services

Proposal

| | 2026-27 | 2027-28 | 2028-29 | 2029-30 | | | | | |
|-------|---------|---------|---------|---------|---------|---------|---------|---------|-------|
| H/M/L | £000s | £000s | £000s | £000s | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |

Contractual Inflation

| | |
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Total Contractual Inflation

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Pressures

| | | |
|----|--------------------------------------|-----------------------------------------------------------------------------------------------------------------------|
| 1 | Strategy & Service Development | Young People Pathway Contribution (£125k p/a from 20/21 +£3k uplift per annum for inflation) £3k pressure added 26/27 |
| 2 | Homelessness Prevention | Apprentices resource |
| 3 | Rapid Re-Housing | £115k TA Pressures no longer required |
| 4 | Housing Needs | Supported accomodation management costs pilot |
| 5 | Homelessness Prevention | £50k increase of discretionary housing payments from 2026/27 (agreed at 2025/26 Budget Council) |
| 6 | Rough Sleeping & Single Homelessness | £15k Additional Homelessness Prevention Officer (agreed at 2025/26 Budget Council) |
| 7 | Rapid Re-Housing | B&B Pressures (on top of the additional £1.7m in 2025-26) |
| 8 | Rapid Re-Housing | Additional staffing & Maintenance costs for additional units |
| 9 | Rapid Re-Housing | TA Repairs & Maintenance Costs |
| 10 | Rapid Re-Housing | TA Furniture & Equipment |
| 11 | Rapid Re-Housing | TA Rents - Bad Debt Provision |
| | | |

| | | | | | | | | | |
|---|------|---------|----|--|--|--|--|--|------|
| L | 3 | | | | | | | | 0.00 |
| | (15) | | | | | | | | 0.00 |
| | 0 | | | | | | | | 0.00 |
| | | (100) | | | | | | | 0.00 |
| | 50 | | | | | | | | 0.00 |
| | 15 | | | | | | | | 0.00 |
| | 186 | (1,001) | | | | | | | |
| | 75 | 75 | 50 | | | | | | |
| | 121 | | | | | | | | |
| | 10 | | | | | | | | |
| | 325 | | | | | | | | |
| | | | | | | | | | |

Total Pressures

| | | | | | | | | | |
|--|-----|---------|----|--|--|--|--|--|--|
| | 770 | (1,026) | 50 | | | | | | |
|--|-----|---------|----|--|--|--|--|--|--|

Existing Efficiencies

| | |
|--|--|
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|--|--|

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Total Existing Efficiencies

| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|
| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|

Invest to Save

| | | |
|----|------------------|-----------------------------------|
| 12 | Rapid Re-Housing | Invest to Save PBR Move on (Beam) |
| 13 | Rapid Re-Housing | Invest to Save - Savings |
| | | |

| | | | | | | | | | |
|--|-------|-------|--|--|--|--|--|--|--|
| | 220 | | | | | | | | |
| | (165) | (200) | | | | | | | |
| | | | | | | | | | |

Total Invest to Save

| | | | | | | | | | |
|--|----|-------|--|--|--|--|--|--|--|
| | 55 | (200) | | | | | | | |
|--|----|-------|--|--|--|--|--|--|--|

Fees and Charges

Housing Services

| Proposal | | H/M/L | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
|---------------------------------------|-------------------------|--------------------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|--------|
| | | | | | | | | | | | |
| Total Fees and Charges | | | | | | | | | | | |
| New Investments / Bids | | | | | | | | | | | |
| 14 | Rapid Re-Housing | Gap Funding to HRA for 150 New TA Units | | 90 | 180 | 90 | | | | | 0.00 |
| 15 | Rapid Re-Housing | Gaining Hostel Status for TA Accommodation | (48) | (72) | (119) | | | | | | 0.00 |
| 16 | Rapid Re-Housing | Face to Face Accommodation costs | 215 | | | | | | | | 0.00 |
| 17 | Rapid Re-Housing | Savings from F2F Intervention | (200) | (170) | | | | | | | 0.00 |
| 18 | Homelessness Prevention | IT System Upgrade (Housing Needs) | 35 | | | | | | | | 0.00 |
| 19 | Rapid Re-Housing | Savings from Upgraded IT System | | | (100) | | | (2.00) | | | (2.00) |
| 20 | Rapid Re-Housing | Project Officer (G9) | 67 | | (67) | | 1.00 | (1.00) | | | 0.00 |
| | | | | | | | | | | | |
| Total New Investment/Bids | | | 69 | (152) | (106) | 90 | 1.00 | (3.00) | | | (2.00) |
| Transformations & New Efficiencies | | | | | | | | | | | |
| | | | | | | | | | | | |
| Total Transformations | | | | | | | | | | | |
| Service Reductions | | | | | | | | | | | |
| | | | | | | | | | | | |
| Total Service Reductions | | | | | | | | | | | |
| Total Housing Services Bids & Savings | | | 894 | (1,378) | (56) | 90 | 1.00 | (3.00) | | | (2.00) |
| | Amended Bids & Savings | | | | | | | | | | |
| | New Bids & Savings | | | | | | | | | | |

Community Safety

Proposal

| H/M/L | 2026-27 £000s | 2027-28 £000s | 2028-29 £000s | 2029-30 £000s | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
|-------|------------------|------------------|------------------|------------------|---------|---------|---------|---------|-------|
|-------|------------------|------------------|------------------|------------------|---------|---------|---------|---------|-------|

Contractual Inflation

| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|
| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|

Total Contractual Inflation

Pressures

| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|
| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|

Total Pressures

Existing Efficiencies

| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|
| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|

Total Existing Efficiencies

Invest to Save

| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|
| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|

Total Invest to Save

Fees and Charges

| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|
| | | | | | | | | | |
|--|--|--|--|--|--|--|--|--|--|

Total Fees and Charges

New Investment / Bids

| | | | | | | |
|---|--------------------------------------------------------|-------|-------|------|--------|------|
| 1 | Complex case team - £80k HRA, £40k RSHG | 120 | (120) | 2.00 | (2.00) | 0.00 |
| 2 | HRA funding for complex case team pilot | (80) | 80 | | | |
| 3 | RSHG for complex team pilot | (40) | 40 | | | |
| 4 | Increased visibility on estates 3 x CRT officers - HRA | 150 | | 3.00 | | 3.00 |
| 5 | Funding of 3 officers (HRA) | (150) | | | | 0.00 |
| 6 | General Licensing Team - 1 fte | 45 | | 1.00 | | 1.00 |

Community Safety

| Proposal | | H/M/L | 2026-27 £000s | 2027-28 £000s | 2028-29 £000s | 2029-30 £000s | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
|---------------------------------------|--------------------------------|-------|------------------|------------------|------------------|------------------|---------|---------|---------|---------|--------|
| | | | | | | | | | | | |
| Total New Investment/Bids | | | 45 | | | | 6.00 | (2.00) | | | 4.00 |
| Transformations & New Efficiencies | | | | | | | | | | | |
| 7 | General Licensing Team - 1 fte | | (45) | | | | (1.00) | | | | (1.00) |
| Total Transformations | | | (45) | | | | (1.00) | | | | (1.00) |
| Service Reductions | | | | | | | | | | | |
| Total Service Reductions | | | | | | | | | | | |
| Total Community Safety Bids & Savings | | | | | | | 5.00 | (2.00) | | | 3.00 |
| Amended Bids & Savings | | | | | | | | | | | |
| New Bids & Savings | | | | | | | | | | | |

Information & Technology Budget Proposals Summary
2026-27 to 2029-30

2026/27

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/ Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Information & Technology | 116 | 1,032 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (100) | 0.00 | 0 | 0.00 | 1,048 |
| Total | 116 | 1,032 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (100) | 0.00 | 0 | 0.00 | 1,048 |

2027/28

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/ Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Information & Technology | 121 | (128) | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (287) | (5.00) | | | (294) |
| Total | 121 | (128) | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (287) | (5.00) | 0 | 0.00 | (294) |

2028/29

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/ Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Information & Technology | 126 | 0 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | | | 126 |
| Total | 126 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 126 |

2029/30

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/ Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Information & Technology | 131 | 0 | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | | | 131 |
| Total | 131 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 131 |

Total Summary

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/ Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Information & Technology | 495 | 904 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | (387) | (5) | 0 | 0 | 1,012 |
| Total | 495 | 904 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (387) | (5.00) | 0 | 0.00 | 1,012 |

Information & Technology

Proposal

H/M/L 2026-27 2027-28 2028-29 2029-30
£000s £000s £000s £000s

2026-27

2027-28

2028-29

2029-30

Total

Contractual Inflation

| | | |
|---|----------------------------------------|---------------------------------------------------------------------------------------------------------------------------|
| 1 | Microsoft Licensing (Annual - Revenue) | 10% on average rise, year-on-year (based on 80K revenue baseline plus Defender and additional Co-Pilot Licenses in 25/26) |
| 2 | Inflation Uplift on Applications | 3% on average rise, year-on-year (based on 3.279K revenue baseline 25/26) |

| | | | |
|----|-----|-----|-----|
| 18 | 20 | 22 | 24 |
| 98 | 101 | 104 | 107 |

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Total Contractual Inflation

116 121 126 131

Pressures

| | | |
|----|----------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 3 | Telephony | Double running pressure, mitigated by reduction in BT costs. This is worst case scenario. If double running costs are removed, this brings forward the 128K saving. |
| 4 | Microsoft Revenue Costs | Microsoft licenses that have been apportioned to revenue costs |
| 5 | Cyber Security MS Uplift | Additional licenses for MS Defender on all laptops (paid in 25/26 on CA90) |
| 6 | Microsoft Co-Pilot Licenses | We currently have 50, with a new cohort which will increase costs |
| 7 | FCS Elections Software | The cloud version is 26k more expensive than the legacy system |
| 8 | Civica Cloud | The cloud version is 145k more expensive than the legacy system |
| 9 | IDOX | The cloud version is 11k more expensive than the legacy system |
| 10 | QL Task Centre Enterprise Uplift | Additional modules purchased |
| 11 | Asset Mgmt System | This relates to the procurement for a new Asset Mgmt System, if the ASM is implemented in 2026/7 |
| 12 | DRS and Infosuite Uplift | The cloud version is 29k more expensive than the legacy system |
| 13 | Azure Consumption | Estimate of data storage and usage for QL, DRS, and Civica in Azure. |
| 14 | Application Uplifts (Historic) | Variance between actual and budget (based on 24/25 figures) |

| | | | |
|-----|-------|--|--|
| 71 | (128) | | |
| 80 | | | |
| 91 | | | |
| 9 | | | |
| 26 | | | |
| 158 | | | |
| 11 | | | |
| 8 | | | |
| 175 | | | |
| 29 | | | |
| 200 | | | |
| 174 | | | |

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Total Pressures

1,032 (128)

Information & Technology

Proposal

| H/M/L | 2026-27 £000s | 2027-28 £000s | 2028-29 £000s | 2029-30 £000s | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
|-------|------------------|------------------|------------------|------------------|---------|---------|---------|---------|-------|
|-------|------------------|------------------|------------------|------------------|---------|---------|---------|---------|-------|

Existing Efficiencies

| | |
|--|--|
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| | |

Total Existing Efficiencies

Invest to Save

| | |
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Total Invest to Save

Fees and Charges

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| | |
| | |

Total Fees and Charges

New Investment / Bids

| | |
|--|--|
| | |
| | |

Total New Investment/Bids

Transformations & New Efficiencies

| | | |
|----|----------------------------------------|----------------------------------------------------------------------------|
| 15 | Supplier (Cloud) vs In-House Support | Assuming 3 x G7 and 2 x G8 |
| 16 | Potential reduction in storage costs | Lower Azure consumption (storage) costs by reducing amount of data stored |
| 17 | Potential reduction in telephony costs | Replace mobile phones for staff only using them for MFA with Fido2 devices |
| | | |

Total Transformations

Service Reductions

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|--|-------|--|--|--|--------|--|--|--|--------|
| | (287) | | | | (5.00) | | | | (5.00) |
|--|-------|--|--|--|--------|--|--|--|--------|

| | | | | | | | | | |
|------|--|--|--|--|--|--|--|--|--|
| (50) | | | | | | | | | |
|------|--|--|--|--|--|--|--|--|--|

| | | | | | | | | | |
|------|--|--|--|--|--|--|--|--|--|
| (50) | | | | | | | | | |
|------|--|--|--|--|--|--|--|--|--|

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|-------|-------|--|--|--|--------|--|--|--|--------|
| (100) | (287) | | | | (5.00) | | | | (5.00) |
|-------|-------|--|--|--|--------|--|--|--|--------|

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Information & Technology

| Proposal | | 2026-27 | | 2027-28 | | 2028-29 | | 2029-30 | | 2026-27 | | 2027-28 | | 2028-29 | | 2029-30 | | Total | | | | | | | | | | | | | | | | | | | | | | | | | |
|-----------------------------------------------|--|---------|-------|---------|-------|---------|--|---------|-------|---------|--|---------|--|---------|--|---------|--|-------|--|--|--|--|-----|--|--|--|--|--|--|--------|--|--|--|--|--|--|--------|--|--|--|--|--|--|
| | | H/M/L | £000s | £000s | £000s | £000s | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Total Service Reductions | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Total Information & Technology Bids & Savings | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| | | 1,048 | | | | | | | (294) | | | | | | | 126 | | | | | | | 131 | | | | | | | (5.00) | | | | | | | (5.00) | | | | | | |
| Amended Bids & Savings | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| New Bids & Savings | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Development Budget Proposals Summary
2026-27 to 2029-30

2026/27

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/ Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Corporate Property | 0 | 1,643 | 1.00 | (208) | 0.00 | 0 | 0 | (1,532) | 0.00 | (125) | 0.00 | (166) | (4.00) | 0 | 0.00 | (388) |
| Economy, Regeneration & Sustainability | 0 | 100 | (2.00) | 0 | 0.00 | 0 | 0.00 | 12 | 0.00 | 0 | 0.00 | 51 | (1.00) | 0 | 0.00 | 163 |
| Planning & Regulatory | 0 | 25 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (25) | 0.00 | 0 | 0.00 | 0 |
| Total | 0 | 1,768 | (1.00) | (208) | 0.00 | 0 | 0.00 | (1,520) | 0.00 | (125) | 0.00 | (140) | (5.00) | 0 | 0.00 | (225) |

2027/28

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/ Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Corporate Property | 0 | 0 | 0.00 | (110) | 0.00 | 0 | 0 | (244) | 0.00 | (180) | 0.00 | 0 | 0.00 | 0 | 0.00 | (534) |
| Economy, Regeneration & Sustainability | 0 | (190) | (2.00) | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 199 | 0.00 | 0 | 0.00 | 9 |
| Planning & Regulatory | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (25) | 0.00 | 0 | 0.00 | (25) |
| Total | 0 | (190) | (2.00) | (110) | 0.00 | 0 | 0.00 | (244) | 0.00 | (180) | 0.00 | 174 | 0.00 | 0 | 0.00 | (550) |

2028/29

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/ Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Corporate Property | 0 | (100) | (7.00) | (190) | (2.00) | (125) | 0 | (1,984) | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (2,399) |
| Economy, Regeneration & Sustainability | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (37) | 0.00 | 0 | 0.00 | (37) |
| Planning & Regulatory | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (15) | 0.00 | 0 | 0.00 | (15) |
| Total | 0 | (100) | (7.00) | (190) | (2.00) | (125) | 0.00 | (1,984) | 0.00 | 0 | 0.00 | (52) | 0.00 | 0 | 0.00 | (2,451) |

2029/30

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/ Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Corporate Property | 0 | (125) | 0.00 | (10) | 0.00 | 0 | 0 | (1,269) | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (1,404) |
| Economy, Regeneration & Sustainability | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 87 | 3.00 | 0 | 0.00 | 87 |
| Planning & Regulatory | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 |
| Total | 0 | (125) | 0.00 | (10) | 0.00 | 0 | 0.00 | (1,269) | 0.00 | 0 | 0.00 | 87 | 3.00 | 0 | 0.00 | (1,317) |

Total Summary

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/ Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Corporate Property | 0 | 1,418 | (6) | (518) | (2) | (125) | 0 | (5,029) | 0 | (305) | 0 | (166) | (4) | 0 | 0 | (4,725) |
| Regeneration & Economy | 0 | (90) | (4) | 0 | 0 | 0 | 0 | 12 | 0 | 0 | 0 | 300 | 2 | 0 | 0 | 222 |
| Planning & Regulatory | 0 | 25 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | (65) | 0 | 0 | 0 | (40) |
| Total | 0 | 1,353 | (10.00) | (518) | (2.00) | (125) | 0.00 | (5,017) | 0.00 | (305) | 0.00 | 69 | (2.00) | 0 | 0.00 | (4,543) |

Corporate Property

| Proposal | | H/M/L | 2026-27 £000s | 2027-28 £000s | 2028-29 £000s | 2029-30 £000s | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
|------------------------------------|---------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|------------------|------------------|------------------|-------------|---------|---------------|---------|---------------|
| Contractual Inflation | | | | | | | | | | | |
| Total Contractual Inflation | | | | | | | | | | | |
| Pressures | | | | | | | | | | | |
| 1 | Commercial Property | Reversal of Additional Resource required to deliver income targets across Property Services and Corporate Assets. Resource is retained for further year | 0 | 0 | (440) | | 0.00 | 0.00 | (6.00) | | (6.00) |
| 2 | Commercial Property | Reversal of capitalisation of additional resources above | 0 | 0 | 360 | | | | | | 0.00 |
| 3 | Commercial Property | Reversal of Recharge to HRA Revenue: Fibre to homes initiative 2x grade 7 in each team. Corporate priority - originally pushed back from 26/27 to 27/28 then to 28/29 | 0 | 0 | 80 | | | | | | 0.00 |
| 4 | Commercial Property | Support zero carbon project | 70 | | (70) | | | | | | |
| 5 | Commercial Property | Capitalisation of above resource | (70) | | 70 | | | | | | |
| 6 | Asset Management | (£125k) Union Street car park alternative use - pushed back from 2028/29 to 2029/30 | | | 0 | (125) | | | | | 0.00 |
| 7 | Commercial Property | Business Rates on empty property | 188 | | | | | | | | |
| 8 | Commercial Property | Consultancy | 23 | | | | | | | | |
| 9 | Commercial Property | Legal Recharge to fund 2 property solicitors to deal with property transactions | 100 | | | | | | | | |
| 10 | Commercial Property | Increase to account for the Rent Payable in respect of the Store Hotel (Income is included below) | 1,162 | | | | | | | | |
| 11 | Property Services | Ecologist | 100 | | (100) | | 1.00 | | (1.00) | | |
| 12 | Property services | Restructure to include waterway, trees and green spaces | 70 | | | | | | | | |
| Total Pressures | | | 1,643 | | (100) | (125) | 1.00 | | (7.00) | | (6.00) |
| Existing Efficiencies | | | | | | | | | | | |
| 13 | Commercial Property | Reversal of previous budget to create compliance building surveyor x 1 fte 24 months contract spread over 2 years on assumption this happens after the condition survey data and analysis / programme agreed - pushed back from 26/27 to 27/28 | 0 | 0 | (60) | | 0.00 | 0.00 | (1.00) | | (1.00) |

Corporate Property

| Proposal | | H/M/L | 2026-27 | 2027-28 | 2028-29 | 2029-30 | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
|-----------------------------|---------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|---------|---------|---------|--------------|---------|---------|---------|--------|
| | | | £000s | £000s | £000s | £000s | | | | | |
| 14 | Corporate Assets | Savings in line with Fit for the Future programme - net off with Regeneration cost - 25/26 saving increased from -£24k, FTE reduction initially pushed back from 25/26 to 26/27 then to 28/29 | | 0 | (20) | | 0.00 | | (1.00) | | (1.00) |
| 15 | Asset Management | Clearchannel contract - new procurement - savings previously projected at £(20)k 25/26 & £(30)k 26/27 | (208) | (110) | (110) | (10) | | | | | |
| Total Existing Efficiencies | | | (208) | (110) | (190) | (10) | (2.00)(2.00) | | | | |
| Invest to Save | | | | | | | | | | | |
| 16 | Assset Management | Review of change of use of properties - pushed back from 26/27 to 28/29 & saving reduced from -£500k to -£100k | M | 0 | (100) | | | | | | |
| 17 | Asset Management | Review of cost of delivery of income from CM and Town Hall | | | (25) | | | | | | |
| Total Invest to Save | | | (125) | | | | | | | | |
| Fees and Charges | | | | | | | | | | | |
| 18 | Asset Management | Consolidated investment portfolio income - current base £13.5 million | | (1,702) | (696) | (1,532) | (1,269) | | | | |
| 19 | Asset Management | Covered Market income | | 170 | 452 | (452) | | | | | |
| Total Fees and Charges | | | (1,532)(244)(1,984)(1,269) | | | | | | | | |
| New Investments / Bids | | | | | | | | | | | |
| 20 | Parks Development | Community improvements in Minchery allotments (previously included with Community Services) | | (10) | | | | | | | |
| 21 | Parks Development | Learner bike park feasibility, design, fundraising | | (80) | | | | | | | |
| 22 | Parks Development | Blackbird Leys Park Replacement goals | | (15) | | | | | | | |
| 23 | Parks Development | Blackbird Leys Park free leisure provision (assumes grant funding) | | 130 | (150) | | | | | | |
| 24 | Parks Development | Outdoor gym replacement | | (100) | | | | | | | |
| 25 | Transactions & Special Projects | Mogridge Drive bridge over railway business case | | (50) | | | | | | | |

Corporate Property

| Proposal | | H/M/L | 2026-27 £000s | 2027-28 £000s | 2028-29 £000s | 2029-30 £000s | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
|----------------------------------------------------|-------------------|---------------------------------------------------------------------------------------------------------------|------------------|------------------|------------------|------------------|---------------|---------|---------------|---------|----------------|
| 26 | Parks Development | City Centre play development (feasibility and funding subject to site being found) (agreed at Budget Council) | | (30) | | | | | | | |
| Total New Investment/Bids | | | (125) | (180) | | | | | | | |
| Transformations & New Efficiencies | | | | | | | | | | | |
| 27 | Property Services | Realignment of GF Maintenance Team in response to creation of HRA Assets Management Team | (138) | | | | (4.00) | | | | (4.00) |
| 28 | Property Services | Increase in Salary Recharges to Capital | (251) | | | | | | | | |
| 29 | Property Services | Reduction in Salary Recharges to HRA | 223 | | | | | | | | |
| Total Transformations | | | (166) | | | | (4.00) | | | | (4.00) |
| Service Reductions | | | | | | | | | | | |
| | | | | | | | | | | | |
| Total Service Reductions | | | | | | | | | | | |
| Total Corporate Property Bids & Savings | | | (388) | (534) | (2,399) | (1,404) | (3.00) | | (9.00) | | (12.00) |
| Amended Bids & Savings | | | | | | | | | | | |
| New Bids & Savings | | | | | | | | | | | |

Economy, Regeneration & Sustainability

| Proposal | | H/M/L | 2026-27 £000s | 2027-28 £000s | 2028-29 £000s | 2029-30 £000s | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
|------------------------------------|----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|------------------|------------------|------------------|---------------|---------------|---------|---------|---------------|
| Contractual Inflation | | | | | | | | | | | |
| Total Contractual Inflation | | | | | | | | | | | |
| Pressures | | | | | | | | | | | |
| 1 | Regeneration | Additional Regeneration Manager post to deliver the increase in capital programme reversal of expenditure | (80) | | | | (1.00) | | | | (1.00) |
| 2 | Regeneration | Capitalise time against capital projects postholder works on (resource budget for this built into capital project budgets) reversal of capitalisation | 80 | | | | | | | | |
| 3 | Economy | Cowley Branch Line Project Manager reversal of one off spend | (80) | | | | (1.00) | | | | (1.00) |
| 4 | Economy | Cowley Branch Line Project Manager funding from CIL/capital-reversal of one off capitalisation | 80 | | | | | | | | 0.00 |
| 5 | Economy | One off contribution to fund external consultant to undertake Economic Strategy review | 50 | (50) | | | | | | | 0.00 |
| 6 | Economy | Internal resource to support work on Oxford growth agenda with central Government | | (40) | | | | (0.50) | | | (0.50) |
| 7 | Economy | Business support / town centre manager to work outside of the city centre | | (75) | | | | (1.00) | | | (1.00) |
| 8 | ODS | Resource to support clienting of ODS in respect of S42 works. | 50 | | | | | | | | 0.00 |
| 9 | Economy | Resource to ensure City can respond to priorities emerging from COMPF such as Bonn Square, St Giles, Queen Street, Broad Street and Island site. | 65 | (65) | | | | | | | 0.00 |
| 10 | Economy | COMPF reversal of spend. | (65) | 65 | | | | | | | 0.00 |
| 11 | Energy & Natural Resources | Reversal of additional 0.5FTE of Energy Efficiency Officer to provide increased support on securing funding driving energy efficiency uptake in the Private Rented Sector funded by Selective licencing - Extended by 2 years (from 25/26 to 27/28) | | (25) | | | | (0.50) | | | (0.50) |
| Total Pressures | | | 100 | (190) | | | (2.00) | (2.00) | | | (4.00) |
| Existing Efficiencies | | | | | | | | | | | |

Economy, Regeneration & Sustainability

| Proposal | | H/M/L | 2026-27 £000s | 2027-28 £000s | 2028-29 £000s | 2029-30 £000s | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
|-----------------------------------------------|------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|------------------|------------------|------------------|---------|---------|---------|---------|--------|
| Total Existing Efficiencies | | | | | | | | | | | |
| Invest to Save | | | | | | | | | | | |
| Total Invest to Save | | | | | | | | | | | |
| Fees and Charges | | | | | | | | | | | |
| 12 | Environmental Sustainability | Reversal of additional income from air quality monitoring - selling services to Oxfordshire County and DEFRA (£10k County / £2k DEFRA) - extending the contract to cover 2025-26 | 12 | | | | | | | | |
| Total Fees and Charges | | | 12 | | | | | | | | |
| New Investments / Bids | | | | | | | | | | | |
| Total New Investment/Bids | | | | | | | | | | | |
| Transformations & New Efficiencies | | | | | | | | | | | |
| 13 | Energy & Natural Resources | Reversal of £25k funding from Selective Licencing income to pay for additional 0.5FTE of Energy Efficiency Officer to provide increased support on securing funding driving energy efficiency uptake in the Private Rented Sector. - EXTEND BY 2 YEARS | | 25 | | | | | | | |
| 14 | Smart, Sustainable Cities | EVI delivery - £411k increase in income from installed charge points (£41k 24-25, £100k 25-26, £120k 26-27, £150k 27-28) - DELAYED BY 2 YEARS (£41k in 26-27, £100k in 27-28 and so on) NOW REVISED to £62k in 26/27, £98k in 27/28, £135k in 28/29 and £148k in 29-30 Updated figures reflect that there already is a £62k income target from previous App3 savings | 0 | (36) | (37) | (13) | | | | | 0.00 |
| 15 | Smart, Sustainable Cities | Pioneering Places programme - £118k income from IUK over 2yrs (£97k 24-25, £21k 25-26) - NET income £11k in 24-25 and £1k in 25-26 - | 21 | | | | (1.00) | | | | (1.00) |
| 16 | Smart, Sustainable Cities | Pioneering Places programme - project costs (£86k in 24-25 and £20k in 25-26) - NET income £11k in 24-25 and £1k in 25-26 | (20) | | | | | | | | |

Economy, Regeneration & Sustainability

| Proposal | | H/M/L | 2026-27 £000s | 2027-28 £000s | 2028-29 £000s | 2029-30 £000s | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
|-------------------------------------------------------------|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|------------------|------------------|------------------|---------|---------|---------|---------|--------|
| 17 | Environmental Quality | ZEZ Pilot - 50/50 income share with the County - current base income £210k | | 210 | | | | | | | |
| 18 | Smart, Sustainable Cities | uplift in ESO income for 24/25 and 25/26 before reducing back down | 5 | | | | | | | | |
| 19 | Smart Sustainable Cities | finalising agreement with County for receipt of c£450k associated with transfer of existing City Council on-street EV charging assets. Payment due for historic resource costs incurred by City Council, and future lost income. Receipt expected to be phased over a 8-10 year period, inflation adjusted. NOW INCLUDED IN EVI - item15 | 45 | | | | | | | | 0.00 |
| 20 | Smart, Sustainable Cities | Core ES staffing budget to support flood, ecology and management responsibilities. Projected to be needed from 29/30 when ES grants/reserves can no longer cover deficit. | | | | 100 | | | | 3.00 | 3.00 |
| Total Transformations | | | 51 | 199 | (37) | 87 | (1.00) | | | 3.00 | 2.00 |
| Service Reductions | | | | | | | | | | | |
| Total Service Reductions | | | | | | | | | | | |
| Total Economy, Regeneration & Sustainability Bids & Savings | | | 163 | 9 | (37) | 87 | (3.00) | (2.00) | | 3.00 | (2.00) |

Amended Bids & Savings
New Bids & Savings

Planning & Regulatory Services

| Proposal | | 2026-27 | 2027-28 | 2028-29 | 2029-30 | | | | | | |
|-----------------------------|------------|---------------------------------------------------------------------------------------|---------|---------|---------|-------|---------|---------|---------|---------|-------|
| | | H/M/L | £000s | £000s | £000s | £000s | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
| Contractual Inflation | | | | | | | | | | | |
| | | | | | | | | | | | |
| Total Contractual Inflation | | | | | | | | | | | |
| Pressures | | | | | | | | | | | |
| 1 | Regulatory | Additional Planning Enforcement Officer - short lets focus (agreed at Budget Council) | | | | | | | | | |
| | | | | | | | | | | | |
| Total Pressures | | | 25 | | | | | | | | |
| Existing Efficiencies | | | | | | | | | | | |
| | | | | | | | | | | | |
| Total Existing Efficiencies | | | | | | | | | | | |
| Invest to Save | | | | | | | | | | | |
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| Total Invest to Save | | | | | | | | | | | |
| Fees and Charges | | | | | | | | | | | |
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| Total Fees and Charges | | | | | | | | | | | |
| New Investments / Bids | | | | | | | | | | | |
| | | | | | | | | | | | |
| Total New Investment/Bids | | | | | | | | | | | |

Planning & Regulatory Services

| Proposal | | 2026-27 | 2027-28 | 2028-29 | 2029-30 | | | | | |
|--------------------------------------------|----------------------------------------------------|---------|---------|---------|---------|-------|---------|---------|---------|---------|
| | | H/M/L | £000s | £000s | £000s | £000s | 2026-27 | 2027-28 | 2028-29 | 2029-30 |
| Total | | | | | | | | | | |
| Transformations & New Efficiencies | | | | | | | | | | |
| 2: Planning | New efficiency savings from increased digitisation | | (25) | (25) | (15) | | | | | |
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| Total Transformations | | | (25) | (25) | (15) | | | | | |
| Service Reductions | | | | | | | | | | |
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| | | | | | | | | | | |
| Total Service Reductions | | | | | | | | | | |
| Total Planning & Regulatory Bids & Savings | | | (25) | (15) | | | | | | |
| Amended Bids & Savings | | | | | | | | | | |
| New Bids & Savings | | | | | | | | | | |

Chief Executive

Proposal

| H/M/L | 2026-27 £000s | 2027-28 £000s | 2028-29 £000s | 2029-30 £000s |
|-------|------------------|------------------|------------------|------------------|
|-------|------------------|------------------|------------------|------------------|

| 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
|---------|---------|---------|---------|-------|
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Contractual Inflation

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Total Contractual

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Pressures

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| 1 Chief Executive | Local Government devolution costs |
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| (100) | | | |
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Total Pressures

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| (100) | | | |
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Existing Efficiencies

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Total Existing Efficiencies

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Invest to Save

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Total Invest to Save

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Fees & Charges

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Total Fees & Charges

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New Investments / Bids

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Total New Investment/Bids

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Service Reductions

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Chief Executive

| Proposal | | H/M/L | 2026-27 £000s | 2027-28 £000s | 2028-29 £000s | 2029-30 £000s | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
|---------------------------------------|------------------------|-------|------------------|------------------|------------------|------------------|---------|---------|---------|---------|-------|
| | | | | | | | | | | | |
| Total Service Reductions | | | | | | | | | | | |
| Total Law & Governance Bids & Savings | | | (100) | | | | | | | | |
| | Amended Bids & Savings | | | | | | | | | | |
| | New Bids & Savings | | | | | | | | | | |

ODS Development Budget Proposals Summary
2026-27 to 2029-30

2026/27

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Oxford Direct Services | 0 | 324 | 1.00 | 0 | 0.00 | 0 | 0.00 | 441 | 0.00 | (35) | 0.00 | 0 | 0.00 | 0 | 0.00 | 730 |
| Total | 0 | 324 | 1.00 | 0 | 0.00 | 0 | 0.00 | 441 | 0.00 | (35) | 0.00 | 0 | 0.00 | 0 | 0.00 | 730 |

2027/28

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Direct Services | 0 | (168) | 0.00 | 0 | 0.00 | 0 | 0.00 | 3,260 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 3,092 |
| Total | 0 | (168) | 0.00 | 0 | 0.00 | 0 | 0.00 | 3,260 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 3,092 |

2028/29

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Oxford Direct Services | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 |
| Total | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 |

2029/30

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Direct Services | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 |
| Total | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 |

Total Summary

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Oxford Direct Services | 0 | 156 | 1 | 0 | 0 | 0 | 0 | 3,701 | 0 | (35) | 0 | 0 | 0.00 | 0 | 0.00 | 3,822 |
| Total | 0 | 156 | 1.00 | 0 | 0.00 | 0 | 0.00 | 3,701 | 0.00 | (35) | 0.00 | 0 | 0.00 | 0 | 0.00 | 3,822 |

Oxford Direct Services Client

Proposal

2026-27 2027-28 2028-29 2029-30
H/M/L £000s £000s £000s £000s

2026-27

2027-28

2028-29

2029-30

Total

Contractual Inflation

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Total Contractual Inflation

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Pressures

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|---|---------------------|------------------------------------------------------------------------------------------------|
| 1 | Motor Transport | Reversal of pressure due to Congestion Charge reprofiled from 26/27 to 27/28 |
| 2 | Waste and recycling | Estimated costs of additional crew required for new properties. To be reviewed in 2 years time |
| 3 | Street cleaning | Broad street manual cleaning |
| 4 | Street cleaning | Fly tipping |
| 5 | Street cleaning | Manual cleaning(Cowley, Banbury, Woodstock Roads) |
| 6 | Parks | Port meadow litter picking |
| 7 | Parks | Pond cleaning |
| 8 | Parks | Holywell cemeteries |

| | | | | | | | | |
|-----|-------|--|--|--|------|--|--|------|
| 0 | (168) | | | | | | | 0.00 |
| 160 | | | | | | | | 0.00 |
| 67 | | | | | | | | 0.00 |
| 15 | | | | | | | | 0.00 |
| 37 | | | | | 1.00 | | | 1.00 |
| 15 | | | | | | | | 0.00 |
| 15 | | | | | | | | 0.00 |
| 15 | | | | | | | | 0.00 |

Total Pressures

| | | | | | | | | |
|-----|-------|--|--|--|------|--|--|------|
| 324 | (168) | | | | 1.00 | | | 1.00 |
|-----|-------|--|--|--|------|--|--|------|

Existing Efficiencies

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Total Existing Efficiencies

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Invest to Save

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Total Invest to Save

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Fees and Charges

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| 9 | Direct Services | Changes in contribution to Council from LATCO - base budget is £2000k in 25/26 |
| 10 | Housing Company | Dividend contribution to Council from OX Place (OCHL) £4.889 million in 2025-26 |
| 11 | Off Street Parking | Closure of Oxpens - assumed closure updated from July 25 to March 27 - savings in rent & business rates |
| 12 | Off Street Parking | Introduce car parking charges at Bury Knowle (pushed back from 25/26 to 26/27) |

| | | | | | | | | |
|---|-------|-------|---|---|--|--|--|------|
| H | (400) | 0 | 0 | 0 | | | | 0.00 |
| H | 1,889 | 3,000 | 0 | 0 | | | | 0.00 |
| | 0 | 260 | 0 | 0 | | | | 0.00 |
| | (10) | 0 | 0 | 0 | | | | 0.00 |

Oxford Direct Services Client

Proposal

| | | 2026-27 | 2027-28 | 2028-29 | 2029-30 | | | | | |
|-----------------------------------------------|--------------------------------------------------------------------------------------------------|-------------|--------------|---------|---------|-------------|---------|---------|---------|-------------|
| | H/M/L | £000s | £000s | £000s | £000s | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
| 13 Off Street Parking | Introduce car parking charges at Sunnymead (pushed back from 25/26 to 26/27) | (10) | 0 | 0 | 0 | | | | | 0.00 |
| 14 Off Street Parking | Increases in car parks fees and charges (increased income from 2026/27 agreed at Budget Council) | (128) | 0 | 0 | 0 | | | | | 0.00 |
| 15 Offstreet Parking | Increase in base budget for car parking income. Base is £7.1 million | (900) | 0 | 0 | 0 | | | | | 0.00 |
| Total Fees and Charges | | 441 | 3,260 | | | | | | | |
| New Investments / Bids | | | | | | | | | | |
| 16 Street Cleaning | Graffiti removal reversal of one off bid | (30) | | | | | | | | |
| 17 Highways & Engineering | Gritting key bike paths & pavements reversal of one off bid | (25) | | | | | | | | |
| 18 Highways & Engineering | Pavement Works (agreed at Budget Council Feb 2025) | 25 | | | | | | | | |
| 19 Off-Street Parking | Development of Smart Parking Charges (agreed at Budget Council) reversal of one off bid | (20) | | | | | | | | |
| 20 Street Cleaning | Additional weed spraying for garage forecourts and car parks | 15 | | | | | | | | |
| Total New Investment/Bids | | (35) | | | | | | | | |
| Transformations & New Efficiencies | | | | | | | | | | |
| Total Transformations | | | | | | | | | | |
| Service Reductions | | | | | | | | | | |
| Total Service Reductions | | | | | | | | | | |
| Total Oxford Direct Services | | 730 | 3,092 | | | 1.00 | | | | 1.00 |

Amended Bids & Savings
New Bids & Savings

HRA

Proposal

H/M/L 2026-27 2027-28 2028-29 2029-30
£000s £000s £000s £000s

2026-27

2027-28

2028-29

2029-30

Total

Contractual Inflation

| | | | | | | | | | |
|------------------------------------|-----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|--|--|--|--|--|------|
| 1 | HRA | Pay Inflation | 192 | | | | | | 0.00 |
| 2 | HRA | Contractual employee inflationary uplifts for the Improvement to communal area management and cleaning team | 6 | | | | | | |
| 3 | HRA | Contractual employee inflationary uplifts associated with works undertaken by ODS covering areas of activity including Caretaking Services, the Garden Scheme, Grounds Maintenance and Planned Maintenance | 3 | | | | | | |
| Total Contractual Inflation | | | 201 | | | | | | |

Pressures

| | | | | | | | | | |
|------------------------|---------|------------------------------------------------|------------|--|--|--|--|--|--|
| 4 | HRA (R) | Shared Ownership Repairs Allowance | 5 | | | | | | |
| 5 | HRA (R) | Complaint Compensation | 30 | | | | | | |
| 6 | HRA (R) | Council Tax on Void Properties | 180 | | | | | | |
| 7 | HRA (R) | Service Charges | 40 | | | | | | |
| 8 | HRA (R) | Increase in ODS caretaking and estate services | 318 | | | | | | |
| 9 | HRA (R) | Contaminated Waste Collection | 70 | | | | | | |
| Total Pressures | | | 643 | | | | | | |

Existing Efficiencies

| | | | | | | | | | |
|------------------------------------|--|--|--|--|--|--|--|--|--|
| | | | | | | | | | |
| Total Existing Efficiencies | | | | | | | | | |

Invest to Save

| | | | | | | | | | |
|-----------------------------|---------|----------------------------------------------------------------|--------------|--|--|--|--|--|------|
| 10 | HRA (R) | Savings arising from efficiencies and budget review activities | (200) | | | | | | 0.00 |
| Total Invest to Save | | | (200) | | | | | | |

Fees & Charges

| | | | | | | | | | |
|----|---------|----------------------------------------------------------------|------|-------|-------|--|--|--|--|
| 11 | HRA (R) | Increase in Costs Recovered by HB through the "Coventry Model" | (73) | (109) | (181) | | | | |
|----|---------|----------------------------------------------------------------|------|-------|-------|--|--|--|--|

HRA

Proposal

H/M/L 2026-27 2027-28 2028-29 2029-30
£000s £000s £000s £000s

2026-27 2027-28 2028-29 2029-30 Total

Total Fees & Charges

(73) (109) (181)

New Investments/Bids

| | | |
|----|-------|------------------------------------------------------------------------------------------------------------------------------------------|
| 12 | HRA R | Support/maintenance for digital noticeboards |
| 13 | HRA R | Shrubs ICT system |
| 14 | HRA R | Reverse 26/27 (£15k) & 27/28 £170k Property Services Compliance, Maintenance & Repairs |
| 15 | HRA R | Investment Resource Planning - Tenancy Management & Tenant Involvement |
| 16 | HRA R | Recharge from PS for Fibre to Homes Initiative - 2 officers and legal costs (saving slipped from 2026/27 to 2027/28, revised to 2028/29) |
| 17 | HRA R | Re-structure of posts in the AH Supply Team |
| 18 | HRA R | Responsive maintenance |
| 19 | HRA R | Furnished Tenancy Scheme increased take up |
| 20 | HRA R | Furnished Tenancy Scheme Service Charge increase |
| 21 | HRA R | Resident Involvement - Resident Rewards, training, conferences & events |
| 22 | HRA R | Increase in Elmore complex case capacity |
| 23 | HRA R | Recharge for 3 x CRT Officers from GF |
| 24 | HRA R | Localz Contract funding for ODS (inc text message bundle) |
| 25 | HRA R | Consultants for QL Project x2 |
| 26 | HRA R | Creation of budgeted HRA Asset Management Team |
| 27 | HRA R | HRA Asset Management Team Recharge to Capital |
| 28 | HRA R | Net Reduction in CP Recharges (excluding SLA) |
| 29 | HRA R | Additional staffing & Maintenance costs for additional TA units |
| 30 | HRA R | TA Rental Income for 150 new Units @ £120 per week |
| 31 | HRA R | Gap Funding from Housing Needs for TA Units |

| | | | |
|---------|-------|-------|------|
| 1 | 1 | | |
| (40) | | | |
| | | | |
| (12) | | | |
| 0 | 0 | (120) | |
| 18 | | | |
| (20) | | | |
| 200 | | | |
| (200) | | | |
| 40 | | | |
| 30 | | | |
| 150 | | | |
| 40 | | | |
| 200 | | (200) | |
| 2,885 | | | |
| (1,074) | | | |
| (223) | | | |
| | 50 | 100 | 50 |
| (351) | (351) | (234) | |
| | (90) | (180) | (90) |

| | | | | |
|-------|--|--|--|-------|
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| | | | | 0.00 |
| | | | | 0.00 |
| | | | | 0.00 |
| | | | | 0.00 |
| | | | | 0.00 |
| 43.00 | | | | 43.00 |
| | | | | 0.00 |
| | | | | 0.00 |
| | | | | |
| | | | | |
| | | | | |

Total New Investments/Bids

1,644 (390) (634) (40)

43.00 43.00

HRA

| Proposal | | H/M/L | 2026-27 £000s | 2027-28 £000s | 2028-29 £000s | 2029-30 £000s | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
|------------------------------------|-----------------------------------------|-------|------------------|------------------|------------------|------------------|---------|---------|---------|---------|-------|
| Transformations & New Efficiencies | | | | | | | | | | | |
| Total Transformations | | | | | | | | | | | |
| Total HRA | | | 2,215 | (499) | (815) | (40) | 43.00 | | | | 43.00 |
| Footnote: | | | | | | | | | | | |
| HRA | Existing Rents increase | | (1,471) | | | | | | | | |
| HRA | New Rental Income from new developments | | (1,908) | | | | | | | | |
| | Amended Bids & Savings | | | | | | | | | | |
| | New Bids & Savings | | | | | | | | | | |

Corporate Services Budget Proposals Summary
2026-27 to 2029-30

2026/27

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Corporate Strategy | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 |
| Financial Services | 0 | 104 | 2.00 | (75) | 0.00 | 0 | 0.00 | (45) | 0.00 | 51 | 1.00 | (30) | 0.00 | 0 | 0.00 | 5 |
| Law & Governance | 0 | 9 | 0.00 | 0 | 0.00 | 0 | 0.00 | (53) | 0.00 | 58 | 1.00 | 0 | 0.00 | (23) | 0.00 | (9) |
| Chief Executive | 0 | (100) | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (100) |
| People | 0 | 0 | 0.00 | 0 | 0.00 | (46) | (0.50) | (13) | 0.00 | 14 | 0.20 | 0 | 0.00 | 0 | 0.00 | (45) |
| Total | 0 | 13 | 2 | (75) | 0 | (46) | (1) | (111) | 0 | 123 | 2 | (30) | 0 | (23) | 0 | (149) |

2027/28

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Corporate Strategy | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 |
| Financial Services | 0 | 0 | 0.00 | (35) | (1.00) | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (40) | (1.00) | 0 | 0.00 | (75) |
| Law & Governance | 0 | 4 | 0.00 | 0 | 0.00 | 0 | 0.00 | 50 | 0.00 | 0 | 0.00 | 0 | 0.00 | (23) | 0.00 | 31 |
| Chief Executive | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 |
| People | 0 | 0 | 0.00 | 0 | 0.00 | (52) | (0.50) | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (52) |
| Total | 0 | 4 | 0 | (35) | (1) | (52) | (1) | 50 | 0 | 0 | 0 | (40) | (1) | (23) | 0 | (96) |

2028/29

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Corporate Strategy | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (10) | 0.00 | (10) |
| Financial Services | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 |
| Law & Governance | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | (10) | 0.00 | (10) |
| Chief Executive | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 |
| People | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 |
| Total | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | (20) | 0 | (20) |

2029/30

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |
| Corporate Strategy | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 |
| Financial Services | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 |
| Law & Governance | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 |
| Chief Executive | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 |
| People | 0 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 |
| Total | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |

Total Summary

| Service Area: | Contractual Inflation | Pressures | | Existing Efficiencies | | Invest to Save | | Fees & Charges | | New Investment/Bids | | Transformations & New Efficiencies | | Service Reductions | | 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 |

General Fund Budget Proposals Summary

Appendix 3

| | | | | | | | | | | | | | | | | |
|--------------------|---|-------|---|-------|-----|------|-----|------|---|-----|---|------|--------|------|------|-------|
| Corporate Strategy | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | (10) | 0.00 | (10) |
| Financial Services | 0 | 104 | 2 | (110) | (1) | 0 | 0 | (45) | 0 | 51 | 1 | (70) | (1.00) | 0 | 0.00 | (70) |
| Law & Governance | 0 | 13 | 0 | 0 | 0 | 0 | 0 | (3) | 0 | 58 | 1 | 0 | 0.00 | (56) | 0.00 | 12 |
| Chief Executive | 0 | (100) | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0.00 | 0 | 0.00 | (100) |
| People | 0 | 0 | 0 | 0 | 0 | (98) | (1) | (13) | 0 | 14 | 0 | 0 | 0.00 | 0 | 0.00 | (97) |
| Total | 0 | 17 | 2 | (110) | (1) | (98) | (1) | (61) | 0 | 123 | 2 | (70) | (1) | (66) | 0 | (265) |

Corporate Policy, Partnerships and Communication

| Proposal | | H/M/L | 2026-27 £000s | 2027-28 £000s | 2028-29 £000s | 2029-30 £000s | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
|-----------------------------------------------|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|------------------|------------------|------------------|---------|---------|---------|---------|--------|
| Contractual Inflation | | | | | | | | | | | |
| Total Contractual Inflation | | | | | | | | | | | |
| Pressures | | | | | | | | | | | |
| | | | | | | | | | | | 0.00 |
| Total Pressures | | | | | | | | | | | |
| Existing Efficiencies | | | | | | | | | | | |
| Total Existing Efficiencies | | | | | | | | | | | |
| Invest to Save | | | | | | | | | | | |
| Total Invest to Save | | | | | | | | | | | |
| Fees and Charges | | | | | | | | | | | |
| Total Fees and Charges | | | | | | | | | | | |
| New Investments / Bids | | | | | | | | | | | |
| 1 | Communications | Cancelling reversal of additional Communications Officer to replace the day-to-day comms work previously undertaken by the Comms Manager. Amended to three year post from June 2022 to May 2025 rather than permanent | 9 | | | | 0.17 | | | | 0.17 |
| 2 | Communications | Funding of retained additional G7 Communications Officer (0.5 FTE G7 Corporate Comms Officer, £20k KP12 Comms - Climate Change Programme, £5k KK04 LSP/Community Strategy) | (9) | | | | (0.17) | | | | (0.17) |
| Total Investments / Bids | | | | | | | | | | | |
| Transformations & New Efficiencies | | | | | | | | | | | |

Corporate Policy, Partnerships and Communication

| Proposal | | 2026-27 | 2027-28 | 2028-29 | 2029-30 | | | | | | |
|----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|---------|---------|---------|---------|-------|---------|---------|---------|---------|-------|
| | | H/M/L | £000s | £000s | £000s | £000s | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
| | | | | | | | | | | | |
| Total Transformations | | | | | | | | | | | |
| Service Reductions | | | | | | | | | | | |
| Communications | Once the website content upgrade has been completed, it will be possible to reduce the £20k website content upgrade budget previously agreed in 2025/26 | | | (10) | | | | | | | |
| Total Service Reductions | | (10) | | | | | | | | | |
| Total Corporate Communication Bids & Savings | | (10) | | | | | | | | | |
| | Amended Bids & Savings | | | | | | | | | | |
| | New Bids & Savings | | | | | | | | | | |

Financial Services

| Proposal | | H/M/L | 2026-27 £000s | 2027-28 £000s | 2028-29 £000s | 2029-30 £000s | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
|------------------------------------|-------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------|------------------|------------------|------------------|-------------|---------|---------|---------|-------------|
| Contractual Inflation | | | | | | | | | | | |
| Total Contractual Inflation | | | | | | | | | | | |
| Pressures | | | | | | | | | | | |
| 1 | Accountancy | Removed from 26/27: Project accountant reversal - resource to be capitalised - moved back | 0 | | | | 0.00 | | | | 0.00 |
| 2 | Accountancy | Removed from 26/27: Project accountant reversal - resource capitalised - moved back | 0 | | | | | | | | 0.00 |
| 3 | Revs and Bens | Project management - Open Revenues move to cloud removal of one off growth for project management | (50) | | | | | | | | |
| 4 | Revs and Bens | Project management - Open Revenues move to cloud - remove capitalisation of one off growth | 50 | | | | | | | | |
| 5 | Corporate Finance | Additional internal audit charges following tendering | 14 | | | | | | | | 0.00 |
| 6 | Corpoate finance | Bank charges in relation to moving to cashless | 20 | | | | | | | | 0.00 |
| 7 | Benefits | Increase in base for benefit admin grant from £368k to base of £388k | (20) | | | | | | | | 0.00 |
| 8 | Revs and Bens | Additional council tax and business rates recovery officer - 8,000 increase in collectable properties and £77m collectable debit in last 15 years with no increase in staff | 50 | | | | 1.00 | | | | 1.00 |
| 9 | ODS Clienting | Additional work to assist with clienting of ODS | 40 | | | | 1.00 | | | | 1.00 |
| Total Pressures | | | 104 | | | | 2.00 | | | | 2.00 |
| Existing Efficiencies | | | | | | | | | | | |
| 10 | Investigations | Data manager (Investigation Services) post introduced as a pilot in 2025-26 to reverse out in 2026/27. Proposing £50k post retained. | 0 | | | | 0.00 | | | | 0.00 |
| 11 | Payments | Changes in processes across the team, with better use of ICT functionality - initially pushed back from 25/26 to 26/27, then to 27/28 | 0 | (35) | | | 0.00 | (1.00) | | | (1.00) |
| 12 | Benefits | Council Tax reduction scheme savings change of income bands | (75) | | | | | | | | |
| | | | | | | | | | | | |

Financial Services

| Proposal | | H/M/L | 2026-27 £000s | 2027-28 £000s | 2028-29 £000s | 2029-30 £000s | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
|----------------------------------------------------|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------|------------------|------------------|------------------|------------------|---------|---------|---------|---------|--------|
| Total Existing Efficiencies | | | (75) | (35) | | | | (1.00) | | | (1.00) |
| Invest to Save | | | | | | | | | | | |
| Total Invest to Save | | | | | | | | | | | |
| Fees and Charges | | | | | | | | | | | |
| 13 | Investigations | Increased income from investigation services contracts base budget currently £250k | M | (45) | | | | | | | |
| Total Fees and Charges | | | (45) | | | | | | | | |
| New Investments / Bids | | | | | | | | | | | |
| 14 | Investigations | Increased ICT cost for Chorus mobile phone tracker | | 11 | | | | | | | |
| 15 | Investigation Team | Additional staff in Investigation Team to secure current income and drive additional income see line 13 | | 40 | | | 1.00 | | | | 1.00 |
| Total New Investment/Bids | | | 51 | | | | 1.00 | | | | 1.00 |
| Transformations & New Efficiencies | | | | | | | | | | | |
| 16 | Revenues & Benefits | Further reduction in staffing resources (resilience contract) connected to roll out of Robotic Processing automation reduces base to £30k | M | (20) | | | | | | | |
| 17 | Incomes | Rationalisation of incomes teams | M | (10) | (40) | | | (1.00) | | | (1.00) |
| Total Transformations | | | (30) | (40) | | | | (1.00) | | | (1.00) |
| Service Reductions | | | | | | | | | | | |
| Total Service Reductions | | | | | | | | | | | |
| Total Financial Services Bids & Savings | | | 5 | (75) | | | 3.00 | (2.00) | | | 1.00 |

Financial Services

[illegible]

Law & Governance

Proposal

| H/M/L | 2026-27 £000s | 2027-28 £000s | 2028-29 £000s | 2029-30 £000s | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
|-----------------------------------------------|------------------|------------------|------------------|------------------|---------|---------|---------|---------|-------|
| Contractual Inflation | | | | | | | | | |
| Total Contractual Inflation | | | | | | | | | |
| Pressures | | | | | | | | | |
| 1 Committee & Member Services | | | | | | | | | |
| 2 Advertising package | | | | | | | | | |
| Total Pressures | | | | | | | | | |
| Existing Efficiencies | | | | | | | | | |
| Total Existing Efficiencies | | | | | | | | | |
| Invest to Save | | | | | | | | | |
| Total Invest to Save | | | | | | | | | |
| Fees & Charges | | | | | | | | | |
| 3 Planning fees | | | | | | | | | |
| 4 Property fees | | | | | | | | | |
| 5 Capital charges increase | | | | | | | | | |
| 6 Elections Reserve FROM RESERVES ONLY | | | | | | | | | |
| Total Fees & Charges | | | | | | | | | |
| New Investments / Bids | | | | | | | | | |

125

39 of 41

People

| Proposal | | 2026-27 | 2027-28 | 2028-29 | 2029-30 | | | | | | |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|---------|---------|---------|-------|---------|---------|---------|---------|--------|
| | | H/M/L | £000s | £000s | £000s | £000s | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
| Contractual Inflation | | | | | | | | | | | |
| | | | | | | | | | | | |
| Total Contractual Inflation | | | | | | | | | | | |
| Pressures | | | | | | | | | | | |
| | | | | | | | | | | | |
| Total Pressures | | | | | | | | | | | |
| Exisiting | | | | | | | | | | | |
| | | | | | | | | | | | |
| Total Existing Efficiencies | | | | | | | | | | | |
| Invest to Save | | | | | | | | | | | |
| HR & OD | Claw back of £138k investment (£42k made in 2024-25) for People Team service re-design leading to post reduction. Propose to push back form 25/26 to 26/27. In discussion with ODS to agree to increased service charges that may then increase the amount of this investment that can be clawed back from 25/26. | | (46) | (52) | | | (0.50) | (0.50) | | | (1.00) |
| Total Invest to Save | | | (46) | (52) | | | (0.50) | (0.50) | | | (1.00) |
| Fees and Charges | | | | | | | | | | | |
| HR & OD | SLA with OxPlace for provision of HR services increased from existing £17k pa to £30k pa from 2026/27 | | (13) | | | | | | | | |
| Total Fees and Charges | | | (13) | | | | | | | | |
| New Investments / Bids | | | | | | | | | | | |

People

| Proposal | | 2026-27 | 2027-28 | 2028-29 | 2029-30 | | | | | |
|--------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-------------|---------|---------|---------------|---------------|---------|---------|---------------|
| H/M/L | | £000s | £000s | £000s | £000s | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total |
| 3 | HR&OD Additional resource for the Health and Safety Team. The Health and Safety Manager role is filled with two part time people, one at 2 days per week and one at 3 days. The employee at 2 days has resigned within 6 months of joining and it will be difficult to replace her at 2 days. Employee turnover in the team is high. It would be helpful to have additional budget for an additional day a week so that there are two managers at 3 days per week. | 14 | | | | 0.20 | | | | 0.20 |
| Total New | | 14 | | | | 0.20 | | | | 0.20 |
| Transformations & New Efficiencies | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| Total Transformations | | | | | | | | | | |
| Service Reductions | | | | | | | | | | |
| | | | | | | | | | | |
| Total Service Reductions | | | | | | | | | | |
| Total Environmental Sustainability Bids & Savings | | (45) | (52) | | | (0.30) | (0.50) | | | (0.80) |
| Amended Bids & Savings | | | | | | | | | | |
| New Bids & Savings | | | | | | | | | | |

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HRA Business Plan | Oxford City Council

Operating Account - Traditional View

| | 2026/27 | 2027/28 | 2028/29 | 2029/30 | 2030/31 |
|-------------------------------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| | £'000 | £'000 | £'000 | £'000 | £'000 |
| Dwelling Rent | (63,413) | (70,007) | (73,685) | (79,264) | (83,818) |
| Service Charges | (3,419) | (3,574) | (3,706) | (3,751) | (3,823) |
| Garage Income | (298) | (298) | (298) | (298) | (298) |
| Miscellaneous Income | (1,078) | (1,078) | (1,078) | (1,078) | (1,078) |
| Net Income | (68,207) | (74,958) | (78,766) | (84,390) | (89,017) |
| Management & Services (Stock Related) | 16,503 | 17,591 | 17,461 | 17,471 | 17,481 |
| Other Revenue Spend (Stock Related) | 1,023 | 1,023 | 1,023 | 1,023 | 1,023 |
| Misc Expenditure (Not Stock Related) | 579 | 596 | 684 | 698 | 703 |
| Bad Debt Provision | 1,153 | 1,270 | 1,328 | 1,427 | 1,509 |
| Responsive & Cyclical Repairs | 18,670 | 18,911 | 19,156 | 19,758 | 19,948 |
| Interest Paid | 15,738 | 20,365 | 23,066 | 25,710 | 28,990 |
| Depreciation | 12,973 | 14,010 | 14,010 | 14,010 | 14,010 |
| Total expenditure | 66,639 | 73,766 | 76,729 | 80,098 | 83,665 |
| Net Operating Expenditure/(Income) | (1,568) | (1,191) | (2,037) | (4,293) | (5,352) |
| Investment Income | (43) | (32) | (41) | (58) | (84) |
| Revenue Contribution to Capital | 0 | 0 | 0 | 0 | 0 |
| Total Appropriations | (43) | (32) | (41) | (58) | (84) |
| Total HRA (Surplus)/Deficit for the year | (1,611) | (1,223) | (2,078) | (4,350) | (5,437) |

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| Wards | 2025/26 | | 2026/27 | |
|----------------------------|--------------|---------------|--------------|---------------|
| | Actual Rents | Formula Rents | Actual Rents | Formula Rents |
| Abingdon | 141.91 | 170.64 | 150.73 | 178.83 |
| Barton & Sandhills | 129.48 | 149.65 | 137.69 | 156.84 |
| Blackbird Leys | 124.07 | 142.39 | 132.02 | 149.22 |
| Carfax & Jericho | 134.94 | 168.62 | 143.42 | 176.71 |
| Churchill | 125.22 | 142.81 | 133.23 | 149.67 |
| Cowley | 116.61 | 132.54 | 124.21 | 138.90 |
| Cutteslowe & Sunnymead | 123.43 | 144.70 | 131.36 | 151.64 |
| Didcot | 116.86 | 130.01 | 124.47 | 136.26 |
| Donnington | 128.23 | 145.18 | 136.39 | 152.15 |
| Headington | 128.27 | 138.97 | 136.42 | 145.64 |
| Headington Hill & Northway | 124.82 | 143.97 | 132.81 | 150.88 |
| Hinksey Park | 126.44 | 158.98 | 134.51 | 166.61 |
| Holywell | 123.09 | 140.18 | 131.00 | 146.91 |
| Kidlington | 130.16 | 145.09 | 138.41 | 152.06 |
| Littlemore | 129.90 | 131.24 | 138.14 | 137.54 |
| Lye Valley | 123.37 | 141.69 | 131.29 | 148.49 |
| Marston | 132.86 | 158.64 | 141.24 | 166.25 |
| Northfield Brook | 122.63 | 141.00 | 130.52 | 147.76 |
| Osney & St Thomas | 128.92 | 152.89 | 137.11 | 160.23 |
| Quarry & Risinghurst | 124.30 | 141.56 | 132.27 | 148.36 |
| Rose Hill & Iffley | 128.55 | 148.67 | 136.72 | 155.81 |
| St Clement's | 123.73 | 142.15 | 131.67 | 148.97 |
| St Mary's | 128.14 | 147.86 | 136.29 | 154.96 |
| Temple Cowley | 129.30 | 147.10 | 137.51 | 154.16 |
| Walton Manor | 133.68 | 165.05 | 142.09 | 172.97 |
| Wolvercote | 120.61 | 140.42 | 128.40 | 147.16 |

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| | | | | | |
|-----------------------------------------------------------|-----------|------------|---------|---------|--------------------------|
| | | APPENDIX 6 | | | |
| Appendix 6 - 26/27 MTFP Capital Programme | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total Proposed Programme |
| | £ | £ | £ | £ | £ |
| | | | | | |
| General Fund Capital Programme | | | | | |
| | | | | | |
| Supply of Telephony Contact Centre Software | 100,000 | | | | 100,000 |
| Commercial & Domestic Recycling & Waste Management System | 100,000 | | | | 100,000 |
| ArcGIS | 100,000 | | | | 100,000 |
| Key2 Vehicle Management Solution | 100,000 | | | | 100,000 |
| M365 Backup Druva | 10,000 | | | | 10,000 |
| Pure Data Solutions | 100,000 | | | | 100,000 |
| PTX-Verify | 25,000 | | | | 25,000 |
| Task Centre Enterprise Upgrade | 25,000 | | | | 25,000 |
| Bacs Payment Processing | 100,000 | | | | 100,000 |
| InCase 365 | 25,000 | | | | 25,000 |
| Versaa Forms- Tenancy Services/Sign-Ups/Portal App | 100,000 | | | | 100,000 |
| Jadu Forms Engine | 75,000 | | | | 75,000 |
| Jadu Website Hosting & Platform Management | 125,000 | | | | 125,000 |
| MFD Printers | 20,000 | | | | 20,000 |
| Data Centre Migration Activities | 200,000 | | | | 200,000 |
| Cyber Security Enhancements / Threat Intelligence | 300,000 | | | | 300,000 |
| Azure Service PAAS Transformation | 100,000 | | | | 100,000 |
| AI Automation | 200,000 | | | | 200,000 |
| Face to Face Accommodation Refurbishment | 75,000 | | | | 75,000 |
| Housing IT System (choice base lettings) | 140,000 | | | | 140,000 |
| Oxford Ice Rink - Roof works | 0 | 1,000,000 | | | 1,000,000 |
| Hinksey Pool Sauna | 0 | | | | 0 |
| Gloucester Green Bin Store | 90,000 | | | | 90,000 |
| Hinksey Break tank replacement | 60,000 | | | | 60,000 |
| Street Lights upgrade | 160,000 | 157,000 | | | 317,000 |
| Financial Management System (re-procurement) | 692,500 | | | | 692,500 |
| ODS Client - EV Fleet Instrastructure | 50,000 | 50,000 | 50,000 | 50,000 | 200,000 |
| ODS Client - Home Charging Installation | 15,000 | 15,000 | 15,000 | 15,000 | 60,000 |
| Blackbird Leys cricket nets | 30,000 | | | | |
| Total GF New Bids | 3,117,500 | 1,222,000 | 65,000 | 65,000 | 4,439,500 |
| | | | | | |
| Leisure Invest to Save | | | 300,000 | | 300,000 |
| Rose Hill CC Gym Equipment | 36,000 | | | | 36,000 |
| East Oxford Community Centre | 88,716 | | | | 88,716 |
| Street Sports Lighting upgrade | 1,000 | | | | 1,000 |
| | | | | | |
| Communities & Citizen Services | 125,716 | - | 300,000 | - | 425,716 |
| | | | | | |
| Software Licences | 476,000 | 523,000 | 575,000 | 633,000 | 2,207,000 |
| ICT End Point Devices | 150,000 | 150,000 | 150,000 | 150,000 | 600,000 |
| Telephony Device refresh | 60,000 | 60,000 | 60,000 | 60,000 | 240,000 |
| ICT - QL Exploitation | 78,000 | 78,000 | 78,000 | 78000 | 312,000 |
| Penalty Notice System | 30,000 | | | | 30,000 |

| | | | | | |
|------------------------------------------------------------------|------------|------------|------------|-----------|------------|
| | | | | | - |
| Information & Technology | 794,000 | 811,000 | 863,000 | 921,000 | 3,389,000 |
| | | | | | - |
| Replace or refurbish Lifts | 227,794 | 150,000 | 150,000 | 150,000 | 677,794 |
| Housing Services | 227,794 | 150,000 | 150,000 | 150,000 | 677,794 |
| Total City & Citizens Services Directorate | 1,147,510 | 961,000 | 1,313,000 | 1,071,000 | 4,492,510 |
| | | | | | |
| Salary Costs across the Council to be capitalised | 663,040 | 663,040 | 663,040 | 663,040 | 2,652,160 |
| | | | | | 0 |
| Financial Services | 663,040 | 663,040 | 663,040 | 663,040 | 2,652,160 |
| | | | | | |
| Audio & Visual Equipment | 12,782 | | | | 12,782 |
| Law & Governance | 12,782 | - | - | - | 12,782 |
| | | | | | |
| ICT - I-trent replacement | 55,000 | - | - | - | 55,000 |
| People | 55,000 | - | - | - | 55,000 |
| | | | | | |
| Total Corporate Services Directorate | 730,822 | 663,040 | 663,040 | 663,040 | 2,719,942 |
| | | | | | |
| Leisure Centre Capital Works & Replacements | 200,000 | 200,000 | - | | 400,000 |
| Community Centres Capital Works & Replacements | 150,000 | - | - | | 150,000 |
| Planned Building Improvements | 750,000 | 750,000 | 750,000 | 750,000 | 3,000,000 |
| Capital works at Covered Market | 100,000 | 100,000 | 100,000 | 100,000 | 400,000 |
| New Burial Space | 1,020,869 | 200,000 | - | | 1,220,869 |
| Stock condition surveys (including bridge works) | 939,027 | 600,000 | 500,000 | 500,000 | 2,539,027 |
| Tumbling Bay Embankment Works | 33,126 | - | - | | 33,126 |
| Covered Market masterplan and enabling works | 3,259,432 | 3,265,551 | 1,286,000 | | 7,810,983 |
| Town Hall Works (Property Services) | 182,740 | 250,000 | - | | 432,740 |
| TH Archive Scanning Project | 600,000 | - | - | | 600,000 |
| Network infrastructure installations (utilities, Comms & Energy) | 40,000 | 40,000 | 40,000 | 40,000 | 160,000 |
| Waterways investment | 500,000 | 500,000 | - | | 1,000,000 |
| Stone walls & Railing programme | 100,000 | - | - | | 100,000 |
| Broad street roofing & Façade project | 1,444,355 | 100,000 | 71,252 | | 1,615,607 |
| Fire Risk Assessment programme works | 50,000 | 50,000 | 50,000 | | 150,000 |
| Bridge investment work | 1,453,869 | - | - | | 1,453,869 |
| M&E Capital Life Replacements | 150,000 | - | - | | 150,000 |
| Regeneration Property Purchase/Odeon | 20,821,963 | 5,466,423 | - | | 26,288,386 |
| Covered Market Units Split – Feasibility | 4,000 | - | - | | 4,000 |
| | | | | | |
| Corporate Property | 31,799,380 | 11,521,974 | 2,797,252 | 1,390,000 | 47,508,607 |
| | | | | | |
| City Wide Cycling Infrastructure Contribution | 55,170 | 55,170 | - | | 110,340 |
| R & D Feasibility Fund | 200,000 | 150,000 | - | | 350,000 |
| Osney Path Works (HIF funded) | 851,929 | - | - | | 851,929 |
| Osney Bridge (Growth Deal) | 5,122,103 | - | - | | 5,122,103 |
| City Cycle Schemes (Growth Deal) | 200,000 | - | - | | 200,000 |
| City Centre Public Realm (Kiosks Project) | 101,390 | - | - | | 101,390 |
| St Michael's Street Levelling Works | 5,605 | - | - | | 5,605 |
| Ice Rink Car Parking Feasibility | 128,877 | - | - | | 128,877 |
| Cowley Branch Line Full Business Case | - | - | 2,500,000 | | 2,500,000 |
| Magdalen Woods Pathway | 7,430 | - | - | | 7,430 |
| Council Chamber upgrade – Feasibility | 30,500 | - | - | | 30,500 |
| Housing Company Loans (excl Barton Park) | 16,000,000 | 9,500,000 | 13,554,000 | 6,800,000 | 45,854,000 |
| Blackbird Leys Regeneration (GF element) | 4,325,948 | 2,970,000 | 5,261,262 | | 12,557,210 |

| | | | | | |
|-----------------------------------------------------------------|------------|------------|------------|------------|--------------------------|
| | | | | | |
| Economy, Regeneration & Sustainability (incl. Housing Delivery) | 27,028,952 | 12,675,170 | 21,315,262 | 6,800,000 | 67,819,384 |
| | | | | | |
| ICT - replacing Uniform (building control and planning) | | | | | - |
| Essential Repairs Grant | 15,000 | 15,000 | 15,000 | 15,000 | 60,000 |
| Disabled Facilities Grants | 1,200,000 | 1,200,000 | 1,200,000 | 1,200,000 | 4,800,000 |
| | | | | | |
| Planning & Regulatory Services | 1,215,000 | 1,215,000 | 1,215,000 | 1,215,000 | 4,860,000 |
| | | | | | |
| Total PLACE Directorate | 60,043,333 | 25,412,144 | 25,327,514 | 9,405,000 | 120,187,991 |
| | | | | | |
| DRS | 12,761 | - | - | - | 12,761 |
| MT Vehicles/Plant Replacement Prog. | 4,700,000 | 3,500,000 | 3,500,000 | 3,058,847 | 14,758,847 |
| | | | | | |
| Total Oxford Direct Client | 4,712,761 | 3,500,000 | 3,500,000 | 3,058,847 | 14,771,608 |
| | | | | | |
| Total General Fund Capital Programme | 69,751,926 | 31,758,184 | 30,868,554 | 14,262,887 | 146,641,551 |
| | | | | | |
| | | | | | |
| <u>Housing Revenue Account Capital Programme</u> | 2026-27 | 2027-28 | 2028-29 | 2029-30 | Total Proposed Programme |
| | | | | | |
| Play / Seating Areas | 60,000 | 60,000 | 60,000 | 60,000 | 240,000 |
| Tower Blocks Water Tanks | 100,000 | - | - | - | 100,000 |
| Tower Blocks Refurbishment Contingency | - | - | 6,000,000 | - | 6,000,000 |
| SHWP Urgent Works (Contingency) | 500,000 | - | - | - | 500,000 |
| Planned Capital Programme Contingency | 500,000 | - | - | - | 500,000 |
| Acquisition of 150 TA Units | 8,500,000 | 16,000,000 | 7,500,000 | - | 32,000,000 |
| Procurement of Housing & Asset Management System | 2,000,000 | 0 | 0 | - | 2,000,000 |
| | | | | | |
| Total HRA New Bids | 11,660,000 | 16,060,000 | 13,560,000 | 60,000 | 41,340,000 |
| | | | | | |
| Structural | 2,000,000 | 1,500,000 | 1,000,000 | 500,000 | 5,000,000 |
| Controlled Entry Upgrades | 500,000 | 500,000 | | 0 | 1,000,000 |
| Major Voids | 1,000,000 | 1,000,000 | 1,000,000 | 1,000,000 | 4,000,000 |
| Electrics | 1,500,000 | 1,500,000 | 1,500,000 | 1,500,000 | 6,000,000 |
| Extensions & Major Adaptions | 1,400,000 | 1,300,000 | 1,300,000 | 1,300,000 | 5,300,000 |
| Energy Efficiency Initiatives | 6,736,311 | 4,300,000 | 5,000,000 | 5,000,000 | 21,036,311 |
| Lift Replacement & Refurbishment Programme | 380,984 | 150,000 | 150,000 | 100,000 | 780,984 |
| Fire Door Installations | 600,000 | 500,000 | 400,000 | 400,000 | 1,900,000 |
| HRA Stock Condition Survey | 120,000 | 120,000 | 120,000 | 120,000 | 480,000 |
| Renewal Of Fire Alarm Panels | 300,000 | 200,000 | 200,000 | 150,000 | 850,000 |
| Communal Capital investment works to Council Homes | 3,335,015 | 3,335,015 | 3,335,015 | 3,335,015 | 13,340,060 |
| External Capital investment works to Council Homes | 10,389,637 | 10,389,637 | 10,389,637 | 10,389,637 | 41,558,548 |
| Internal Capital investment works to Council Homes | 8,503,914 | 8,503,914 | 8,503,914 | 8,503,914 | 34,015,656 |
| Tower Blocks - Fire Alarm System Replacement | 1,261,496 | 4,000,000 | 4,000,000 | 3,000,000 | 12,261,496 |
| | | | | | |
| Planned Maintenance | 38,027,357 | 37,298,566 | 36,898,566 | 35,298,566 | 147,523,055 |
| | | | | | |
| Blackbird Leys Regeneration | 890,000 | 1,350,000 | 11,637 | | 2,251,637 |
| East Oxford Development | 872,903 | - | - | - | 872,903 |
| Properties purchased from OCHL | 37,276,848 | 41,262,637 | 22,750,065 | 78,595,634 | 179,885,184 |
| Westlands Drive | 4,459,227 | 1,233,753 | | | 5,692,980 |
| Sandy Lane Rec | 3,951,542 | 3,951,542 | 9,781,993 | 79,866,226 | 97,551,303 |

| | | | | | |
|--------------------------------------------------------------------|--------------------|--------------------|--------------------|--------------------|--------------------|
| Elsfield Hall | 125,671 | 6,314,228 | 1,839,655 | 1,400,446 | 9,680,000 |
| Cave Street | 2,235,135 | 2,445,465 | 219,400 | - | 4,900,000 |
| 21 Between Towns Road (Knights Court) | 1,008,796 | 4,633,954 | 257,250 | - | 5,900,000 |
| Northfield Development Phase 1 | 9,338,517 | 3,334,440 | 922,305 | 900,832 | 14,496,094 |
| Oxford North Development | 9,663,308 | | - | - | 9,663,308 |
| Retained Right to Buy Receipts (Acquisitions) Additional Units | 3,000,000 | 15,000,000 | 3,000,000 | 3,000,000 | 24,000,000 |
| Leiden Road (c. 12 affordable homes) | 363,316 | 1,989,138 | 286,393 | - | 2,638,847 |
| Underhill Circus (c. 11 affordable homes) | 1,034,100 | 1,897,675 | 354,292 | - | 3,286,067 |
| HRA Barton Acquisitions | 15,948,617 | 12,361,462 | - | | 28,310,079 |
| Windale & Northbrook Decant Costc | 481,000 | - | - | | 481,000 |
| | | | | | |
| Affordable Housing development | 90,648,980 | 95,774,294 | 39,422,990 | 163,763,138 | 389,609,402 |
| | | | | | |
| Total HRA Capital Programme | 140,336,337 | 149,132,860 | 89,881,556 | 199,121,704 | 578,472,457 |
| | | | | | |
| Total Capital Programme | 210,088,263 | 180,891,044 | 120,750,110 | 213,384,591 | 725,114,008 |
| | | | | | |
| Financing - General Fund | | | | | |
| Community Infrastructure Levy | 1,514,755 | 455,170 | - | - | 1,969,925 |
| Community Infrastructure Levy (Additional identified) | 2,288,385 | 697,000 | 190,000 | 40,000 | 3,215,385 |
| Developer contributions and cil forward funding cowley branch line | - | - | 2,500,000 | - | 2,500,000 |
| Capital Receipts - General | 12,721,238 | 6,969,591 | 4,513,292 | 3,164,040 | 27,368,161 |
| Government Funding (DFG) | 1,200,000 | 1,200,000 | 1,200,000 | 1,200,000 | 4,800,000 |
| Government Grants | 5,605 | - | 300,000 | - | 305,605 |
| Growth Deal Funding | 5,322,103 | - | - | - | 5,322,103 |
| Housing Infrastructure Funds (HIF) | 851,929 | - | - | - | 851,929 |
| Prudential Borrowing | 45,847,911 | 22,436,423 | 22,165,262 | 9,858,847 | 100,308,443 |
| | | | | | |
| Total Financing - General Fund | 69,751,926 | 31,758,184 | 30,868,554 | 14,262,887 | 146,641,551 |
| | | | | | |
| General Fund Over / (Under) Financing | 0 | 0 | 0 | 0 | 0 |
| | | | | | |
| Financing - HRA | | | | | |
| Homes England Grant/growth deal | 14,733,000 | 9,826,000 | 3,104,000 | - | 27,663,000 |
| MRR | 13,219,000 | 13,872,000 | 14,003,000 | 13,107,000 | 54,201,000 |
| RRTB Receipts | 3,000,000 | 15,000,000 | 3,000,000 | 3,000,000 | 24,000,000 |
| Other RTB Receipts | 26,000 | 26,000 | 26,000 | 26,000 | 104,000 |
| Other Capital receipts | 5,875,000 | 5,046,000 | 4,820,000 | 7,799,000 | 23,540,000 |
| Borrowing | 103,483,337 | 105,362,860 | 64,928,556 | 175,189,704 | 448,964,457 |
| | | | | | |
| Total Financing - HRA | 140,336,337 | 149,132,860 | 89,881,556 | 199,121,704 | 578,472,457 |
| | | | | | |
| HRA Over / (Under) Financing | 0 | 0 | 0 | 0 | 0 |
| | | | | | |
| TOTAL FINANCING | 210,088,263 | 180,891,044 | 120,750,110 | 213,384,591 | 725,114,008 |
| | | | | | |
| Total Over / (Under) Financing | 0 | 0 | 0 | 0 | 0 |

BUDGET REPORT RISK IMPLICATIONS 2026/27 to 2029/30

| 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 | |
| B3 | Fairer funding | Threat | Fairer funding is not as estimated | Fairer funding is the main allocation of local authority funding consisting of business rates baseline income and revenue support grant and other grants. The amount of allocation is unlikely to be known for certain until the finance settlement in December 2025 | Reduce estimated expenditure. Whilst use of reserves is an option this must be caveated by the need to take corrective action in future years to address ongoing pressures. | 30-Oct-25 | 4 | 3 | 4 | 3 | 4 | 3 | Assessment of the Finance settlement once known and taking mitigating action between Consultation Budget and Final Budget setting in February 2026 |
| B4 | Reduced return from companies | Threat | Reduction in interest and dividend from OCHL or dividend from ODS | Reduced development activity in OCHL or increased interest costs from borrowing. Reduced income and efficiencies in ODS | Severe impact on Councils MTFP. | 30-Oct-25 | 4 | 3 | 4 | 3 | 4 | 2 | Monitor monthly, obtain company business plans |
| B6 | Partner failure | Threat | Major partner fails financially causing disruption or ceasing of key council services e.g. leisure | Financial failure of partner | Overpends or service reduction in other service areas | 30-Oct-25 | 3 | 3 | 3 | 3 | 3 | 2 | Monitor, prepare contingency plans to re-tender service |
| B7 | 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, Business rates reset and fairer funding reduce income lower than expected | Less council funding | 30-Oct-25 | 4 | 3 | 4 | 3 | 4 | 2 | Monitor monthly |
| B8 | Treasury Investment returns | Threat | Economic activity has an adverse effect on investment returns | Investment returns are derived from a number of sources. Interest returns from OCHL may be less if activity within the company starts to reduce as a result of increased borrowing rates. Investment interest returns from banks and other lenders will increase but returns from some of the council's multi-asset funds and property funds are more susceptible to economic conditions such as movement in property prices and stocks and shares | Reduced investment income | 30-Oct-25 | 4 | 3 | 4 | 3 | 4 | 2 | Interest rates are already on the increase and may adversely affect the council. There is a higher level of risk associated with property investment funds and multi-asset funds which is partially mitigated through the use of earmarked reserves. |
| B9 | Efficiencies | Threat | Any further slippage in the delivery of savings and efficiencies, especially around trading or additional pressures on the 2025-26 budget that could impact on 2026-27 and beyond | Changes in circumstances make savings unattainable | Reduced efficiencies increased overspend on net budget | 30-Oct-25 | 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 |

| 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 | |
| B10 | Right to Buy sales vary from estimate | Threat | Variations in numbers of RTB's affects HRA planning | More houses sold or changes in RTB discounts or amounts to be retained by local authority for capital spend | A decrease in the numbers of RTB's will lead to less capital receipts to fund the Capital Programme. Conversely an increase in the numbers of RTBs would lead to a revenue pressure from reduced rental income | 30-Oct-25 | 3 | 3 | 3 | 3 | 3 | 2 | Track situation and either re-prioritise spend or use additional borrowing headroom |
| B11 | 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 | 30-Oct-25 | 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. |
| B12 | Income Streams | Threat | Some businesses and individuals are struggling financially. There is a potential for arrears of key income streams to the council to increase if not kept in check | Financial hardship by businesses and individuals | Increased write off of income and reduced income to fund services | 30-Oct-25 | 4 | 3 | 3 | 3 | 3 | 2 | Monitor and early action |
| B13 | 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 | 30-Oct-25 | 4 | 3 | 4 | 3 | 4 | 2 | Robust monthly monitoring, consider prudential borrowing to fund shortfall or defer projects |
| B14 | Savings not achieved | Threat | Savings in budget from efficiencies and transformation may not be achieved | Service pressures | Potential overspend | 30-Oct-25 | 3 | 3 | 3 | 3 | 3 | 2 | Monitoring |
| B15 | 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 | 30-Oct-25 | 3 | 3 | 3 | 3 | 3 | 2 | Robust monthly monitoring of programme, introduction of Capital Gateway Process and flexible treasury management strategy. Introduction of optimism bias to estimates |

Oxford City Council Budget Medium Term Financial Strategy 2027-28 to 2029-2030 and 2026-27 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 2025 to January 2026.

The draft budget has been structured so that it is in balance for the next four years, and although 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. In addition it includes additional expenditure on to bolster our service provision in a number of areas and outlines proposals to facilitate capital investment for large scale regeneration projects which will bring economic growth, jobs, more social and affordable housing and wider interventions to ensure social inclusive communities and opportunities: underpinning the Council's vision of "Building a World Class City for Everyone".

| Budget Proposal | Increase Council Tax by an expected 2.99% for 2026/27 followed by subsequent annual increases of 2.99%, and maintain the existing Council Tax Support Scheme |
|---------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Is this proposal new or subject to an annual review? | It is assumed the referendum limit for District Councils will be 3% or £5 whichever is the higher. The Council is proposing an increase of 2.99% since this increase at £10.67 per annum is the higher |
| What are the likely risks? | <ul style="list-style-type: none"> • 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 support scheme, which is being maintained in full). • Increased arrears due Council tax increases |
| What public consultation has been planned/ taken place? | There will be further opportunities for comment on the level of council tax increase as part of the public consultation during the period December 2025 to January 2026. The Council consults on the Council Tax Support Scheme which is still more beneficial than other schemes in other councils |

| | | | |
|------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|------------------------------|
| What mitigating actions will the Council implement to offset any negative impacts? | The Council will consider its Council Tax Reduction Scheme when it meets in January 2026. The Council has a limited amount of Government Grant that it may use at its discretion to assist vulnerable individuals effected by the increase. The Council is willing to have discussions with individuals to ensure that they are claiming their full entitlement to benefits. | | |
| 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 continues to be the one of only a few authorities to maintain a Council Tax Reduction Support Scheme covering 100% of the council tax although with the current budgetary pressures it is uncertain how long this can continue to be supported.Currently the total net caseload is 10,000 receiving Council Tax Benefit & Housing Benefit, with 5640 of those receiving CTR discount in full with a further 129 having to pay less than £1. The 2.99% increase will have limited or nil effect on these accounts. | | |
| | 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: Increase in council house rents by 2.70% per annum for 2025/26. | | |
| Is this proposal new or subject to an annual review? | Under the rent standard, the Government have determined that rents may be increased by CPI +1%. In addition consultation has taken pace on the ability of social landlords to increase rents by a further £2 per week to raise rents to formula rent. The Government have yet to confirm whether this is allowable and an announcement is likely o be made alongside the Budget in November | | |
| What are the likely risks? | The increase for 2026-27 at 4.8% i.e 3.8% +1% represents an average of £8.47 per week. Including the maximum £2 per week amount in respect of formula rent. There is a risk of increased rents arrears which could rise as a result of the increase. Issues may arise from the implementation of universal credit which is being monitored by the Council | | |

| | | | |
|------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|----------------------------------------------------|
| 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? | <ul style="list-style-type: none">As of end of October 2025 there are a total of 5,414 HRA tenants (70%) claiming Housing cost element of Universal Credit or Housing Benefit. This is made up of 3,779 Universal Claimants and 1,635 Housing Benefit claimants. The amount claimed by each tenant will vary depending on their individual circumstances. | | |
| 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 | Increases in Fees and Charges across Council services | | |
| Is this proposal new or subject to an annual review? | Annual | | |
| What are the likely risks? | That customers will be unable to afford to purchase council services | | |

| | | | |
|------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|----------------------------------------------------|
| What public consultation has been planned/ taken place? | Budget consultation annually (December 2025/ January 2026). | | |
| What mitigating actions will the Council implement to offset any negative impacts? | <p>Concessions are given to users of the services who are in receipt of housing benefit, Council Tax Reduction and the housing element of universal credit re in receipt of Housing Benefit in the following areas:</p> <p>Garden Maintenance for housing tenants</p> <p>Pest Control – 50% -60% concession for most services</p> <p>Garden waste – 56% concession</p> <p>Bulky Items – 50% concession</p> | | |
| Overall assessment of the equality risks | There may be groups adversely affected by specific service fees, however, consultation and monitoring will take place with these groups once identified. | | |
| | 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 |

By virtue of paragraph(s) 3 of Part 1 of Schedule 12A
of the Local Government Act 1972.

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To: Cabinet

Date: 10 December 2025

Report of: Director of Planning and Regulation

Title of Report: Authority Monitoring Report and Infrastructure Funding Statement 2024/25

| Summary and recommendations | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Purpose of report: | To approve the Authority Monitoring Report and Infrastructure Funding Statement for publication. |
| Key decision: | No |
| Cabinet Member: | Councillor Alex Hollingsworth, Cabinet Member for Planning and Culture |
| Corporate Priority: | Strong, fair economy Good, affordable housing Thriving communities Zero carbon Oxford A well-run council |
| Policy Framework: | <p>The Authority Monitoring Report is a statutory requirement, providing information as to the extent to which the policies set out in the Oxford Local Plan are being achieved and on the implementation of the Local Development Scheme. The scope of those policies is wide and encompasses all of the Council's corporate priorities.</p> <p>The Infrastructure Funding Statement is a factual report and statutory requirement which summarises the amount of developer contributions (Community Infrastructure Levy (CIL) and Section 106) obtained, allocated and spent by the authority in the previous financial year (April 2024– March 2025).</p> |
| Recommendation(s): That Cabinet resolves to: | |
| <ol style="list-style-type: none"> Approve the Authority Monitoring Report and Infrastructure Funding Statement 2024/25 for publication. Authorise the Director of Planning and Regulation to make any necessary minor corrections not materially affecting the document prior to publication. | |

| Appendices | |
|------------|------------------------------------------|
| Appendix 1 | Authority Monitoring Report 2024/25 |
| Appendix 2 | Infrastructure Funding Statement 2024/25 |
| Appendix 3 | Risk Assessment |
| Appendix 4 | Equalities Impact Assessment |

Introduction and background

1. Section 35 of the Planning and Compulsory Purchase Act 2004 requires local planning authorities to publish monitoring reports at least yearly, in the interests of transparency.
2. The Authority Monitoring Report (AMR) 2024/5 assesses the effectiveness of planning policies contained within the Oxford Local Plan (OLP) 2036 as well as the implementation of the Oxford Local Development Scheme 2023-2028, the Council's Statement of Community Involvement in Planning and the Duty to Cooperate. The AMR covers the period 1st April 2024 to 31st March 2025 and is a factual document.
3. The AMR is structured as follows: a status report on the production of development plan documents, followed by the monitoring of the Oxford Local Plan 2036 policies. Policy monitoring has been arranged around the three overarching objectives set out in paragraph 8 of the National Planning Policy Framework (NPPF) 2023¹:
 - Economic objectives to build a strong, responsive and competitive economy - the economy, retail, community and infrastructure.
 - Social objectives to support building strong, vibrant and healthy communities – housing, health and community benefits; and
 - Environmental objectives to project and enhance our natural, built and historic environment – design and heritage, protecting our green and blue spaces and making wise use of our natural resources to secure a good quality local environment.
4. The Infrastructure Funding Statement (IFS) is a reporting requirement introduced in September 2019 as an amendment to the Community Infrastructure Levy 2010, with the objective of increasing transparency around how developer contributions are spent on infrastructure. As set out in Appendix 2, the contents of the IFS are divided into three key sections for the previous financial year:
 5. Information on Community Infrastructure Levy (CIL) contributions.
 6. Information on Section 106 contributions (made under section 106 of the Town and Country Planning Act 1990).

¹ <https://www.gov.uk/government/publications/national-planning-policy-framework--2>

7. Items of infrastructure that CIL is to be spent on in the next five years (CIL is allocated to the Council's Capital Programme as part of the Budget setting process).

Key AMR findings: Building a strong, responsive and competitive economy

Employment land

8. Oxford's highly constrained nature means that competition for different land uses is fierce. As such Policy E1: Employment Sites sets out how employment sites are categorised in order of importance and thus afforded different levels of protection. Category 1 & 2 employment sites are key in providing employment space for the city, whereas Category 3 sites and B8 sites provide more potential to be released from employment uses to ensure the best and most efficient use of land. Policy E1 permits residential development on all categories of employment sites, subject to adherence with Local Plan policies.
9. Two permissions were granted resulting in the net loss of Category 1 & 2 employment floorspace: Part ground, 1st, 2nd, and 3rd floors from offices (Use Class E) to student accommodation (-100m²); Change of use from E(g) to C3 (-261m²).
10. Total loss of Category 3 employment floorspace (permissions): 3,135.1m².
11. Total gain of employment floorspace (permissions): 55,415m² (compared to 84,602m² in the previous monitoring year).
12. Applications for changes of use from office to residential which are subject to notification to the council: 5 applications granted (all involving loss of Category 3 sites and overlapping with that total loss figure above).

Growth of Oxford's universities

13. The City Council is committed to supporting the sustainable growth of the two universities within the parameters of competing demands for land. The universities are encouraged to focus growth on their own sites by making the best use of their current landholdings and the redevelopment and intensification of their assets where appropriate. Policy E2: Teaching and Research states that new or additional academic floorspace will only be granted if it is demonstrated that additional student accommodation is not required or is provided as set out in Policy H9: Linking the delivery of new/redeveloped and refurbished university academic facilities to the delivery of university provided residential accommodation.
14. The University of Oxford had 26,595 students attending the University and its colleges as of 1st December 2024; of these 10,636 were excluded from accommodation needs as they were not on full time taught courses, leaving 14,959 full-time students with accommodation needs. On 1st December there were 14,407 accommodation places provided, leaving a total of 552 students the policy applies to living outside of university accommodation which is within the threshold set out in policy H9 for the University of Oxford.
15. Oxford Brookes University (OBU) states there were 21,856 students attending the university as of 1st December 2024 (compared to 19,586 the

year before). Of these 11,009 were excluded from accommodation needs, leaving 8,577 full-time Oxford Brookes students requiring accommodation. On 1st December 2024 there were 5,094 student places provided leaving 3,132 students the policy applies to without a place in university provided accommodation. This is below the threshold set out in policy H9 for Oxford Brookes. This figure represent a decrease in the number of students outside of university provided accommodation when compared to last monitoring period (2023/24 – 3,720).

Summary of university monitoring data:

- Approved additional academic and administrative floorspace: 14,542.54m².
- Number of University of Oxford students living outside of provided accommodation: 552 – within policy H9 threshold.
- Number of Oxford Brookes students living outside of provided accommodation: 3,132 – within policy H9 threshold.

Ensuring the vitality of our centres

16. Oxford provides a wide range of services and facilities to both residents and visitors alike, and policies have been drafted in the OLP 2036 to maintain and enhance this vibrancy and vitality. Policy V1 aims to protect the town, district and local centres, whilst Policies V2-V4 provide the framework as to what mix of uses would be acceptable. Because the use classes referred to in policies V1-V4 were superseded by the introduction of the new Use Class E, the AMR instead reports on the current percentage share of Use Class E. The proportion of Use Class E (used as a proxy for the threshold for Use Class A set out in the policies) is above the policy thresholds for Class A for Cowley, Headington, Summertown and primary city centre shopping frontage (meaning that change of use involving a loss of Use Class E would be acceptable in principle). The proportion of Class A uses is 81% in East Oxford (Cowley Road) and 58% for Blackbird Leys, which is below the 85% threshold. In the city centre secondary frontage, the proportion is 74.27%, below the 85% threshold.

Sustainable tourism and cultural venues, community facilities and infrastructure

17. Tourism is an important and substantial element of Oxford's economy. The provision of short stay accommodation allows more options for tourists to stay over in the city and thus bring more money into the local economy. Policy V5: Sustainable Tourism seeks to locate new tourist accommodation in accessible locations to reduce dependency on the private car, and in addition the policy does not permit new accommodation if it would result in the loss of residential dwellings. New tourist attractions in the city must be easily accessible by active travel or public transport and be well related to existing tourist and leisure facilities. Policies V6 and V7 seek to protect cultural, social and community facilities.
- Two Planning permissions were granted for additional hotel bedrooms: one permission for a development of 133 rooms at Thornhill Park (Nielsen House) and change of use from an HMO to a 5-guestroom hotel at 222 London Road.

18.2 applications involving loss of rooms and floorspace - 8 rooms at 250 Iffley Road and a change of use from Boarding House (Use Class C1) to create 2 x 6 bed dwelling houses (Use Class C3) at 244 - 246 Iffley Road.

Key AMR findings: Building strong, vibrant and healthy communities

Housing

19. In this monitoring year 272 (net) dwellings were completed in Oxford of which 61 were affordable dwellings. This includes the equivalent numbers calculated through the application of ratios for communal accommodation (student completions and other communal accommodation). Whilst the number of completions in the 2024/25 monitoring year has fallen below the Local Plan's annual requirement, the cumulative number of dwellings completed in the 7 years since the start of the Local Plan period (2016/17 to 2024/25) is 4,417 dwellings (net). The housing trajectory had projected that by 2024/2025, 4,673 dwellings (net) would have been provided (Figure 1). Figure 2 below shows the cumulative projection is just under the target to meet the minimum of 10,884 dwellings to 2036 as set out in policy H1. There are likely to be a range of potential factors which have affected completion rates in recent years, these are difficult to separate out statistically, however officers are working hard to maximise opportunities to deliver housing to meet the target.



Figure 1: Local Plan 2036 Completions and Projections



Figure 2: Cumulative Requirement and Cumulative Supply

20. The breakdown of the 75 affordable dwellings completed during the monitoring year is as follows: 18 social rent at Barton Park Phase 3; 34 social rent at Barton Park Phase 4; 13 social rent at St Frideswide Farm; 5 social rent and 5 shared ownership at Lanham Way.
21. Since the start of the Local Plan period there have been a total of 1073 affordable homes built (Figure 3).

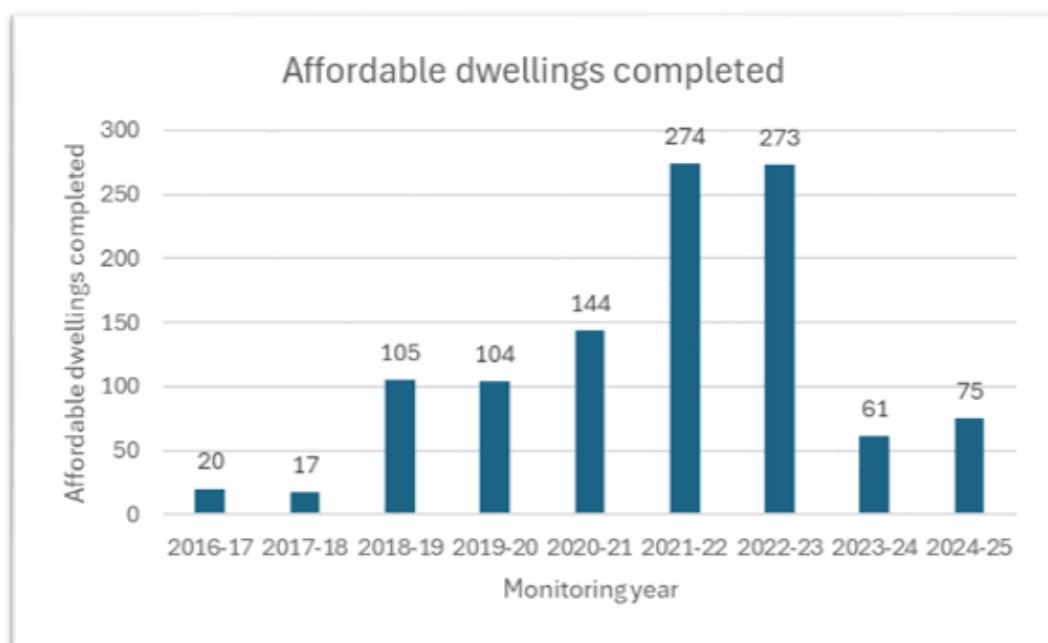


Figure 3: Net affordable dwellings completed 2016/17 - 2022/23

The Council is committed to delivering more affordable housing in Oxford and has been identifying land in its ownership capable of delivering affordable homes and bringing this forward wherever possible. Of the 75 affordable dwellings completed in 2024/25, 62 were delivered on City Council Land.

In summary:

- 22. Net dwellings completed in 2024/25: 272 of which 75 were affordable:
- 23. Affordable units delivered on council land in 2024/25: 62,
- 24. Net C3 dwellings permitted in 2024/25: 524; of which were affordable: 75.

Provision of new student accommodation

- 25. There were 4 planning permissions for student accommodation, all of which were compliant with the location criteria set out in Policy H2.
- Applications for new student accommodation: 5
- Number of new student rooms with permission: 197.

Housing land supply

- 26. In previous monitoring periods the housing land supply has been calculated against the housing requirement in the adopted Local Plan. The NPPF states where local plan policies are more than 5 years old, then this should be measured against the standard method calculation of housing need. The Oxford Local Plan 2036 was adopted in June 2020 and so the basis of the calculation has therefore changed. The standard method housing figure of 1087 dpa is now applied. Against this figure, the Council has identified a deliverable supply of 3,289 homes which includes the forecast supply from large sites, including those which have been allocated in the Local Plan and outstanding permissions from small sites (commitments) plus a windfall allowance. This gives a housing land supply of 2.88 years.
- 27. As a comparison, had the basis of the calculation continued as in previous years (with the requirement figure from the adopted Local Plan 2036 being used) this would have resulted in a housing land supply of 5.12 years.
- 28. Whilst work on the Local Plan 2045 has provided further updates on the anticipated delivery of some of the large trajectory sites, alongside a further round of landowner engagement to inform our Strategic Housing and Land Availability Assessment (SHLAA) previously the Housing and Economic Land Availability Assessment (HELAA), until such time that a new Local Plan is adopted (and the calculation of land supply can be on the basis of the adopted housing requirement), the standard method will be used.
- Housing land supply: 2.88 years.

Key AMR findings: Oxford's Historic Environment

- 29. There are three buildings are on English Heritage's at-risk register, with Minchery Farmhouse having been added since the previous monitoring year.

Key IFS Headlines

- 30. The IFS reports on the developer contributions received, allocated and spent for 2024-25.

31. £4,950,125.08 of CIL was collected in 2024-25 and a total of £9,156,398.96 of CIL was spent. £5,139,340.88 of CIL was set out in demand notices in the year for collection.
32. £8,591,935.88 of CIL was spent on strategic infrastructure; £142,551.22 was passed to Parish Councils; £503,354.15 was received in 24/25 to be allocated or spent towards Neighbourhood forums and Neighbourhood CIL, and £304,638.58 was spent by Neighbourhood Forums. As per the CIL regulations, £118,273.28 was spent on administration fees.
33. In 2024-25, £856,781.04 was received in Section 106 agreements and £1,046,290.11 was spent towards infrastructure projects. A further £351,089.94 of S106 agreements were entered into in the year.
34. From the total of £13,948,025.67 received under Section 106 planning obligations but not spent in the year 24-25, contributions are allocated to be spent on primarily affordable housing (£12,166,478.39); followed by open space/green infrastructure (£867,678.62); Community (£403,000.00) Highways/transport and travel (£227,035.75); and Other/Economic development uses (£283,832.90).
35. 201 units of Affordable housing are to be provided through Section 106 agreements entered into in 2024-25. Whilst the value associated with those units is not reported in the IFS, as an indication the combined sales price of those units might be expected to reach £70 million plus (based on average 2-bed apartment in this area).

Carbon and Environmental Considerations

36. There are no specific carbon and environmental implications arising from this report. Policies in the Local Plan are seeking to optimise opportunities for carbon reduction. This statutory framework brings us closer to our commitment to becoming a Zero Carbon Council by 2030 or earlier and Zero Carbon Oxford by 2040 or earlier.

Financial implications

37. There are no financial implications arising from these reports. The IFS simply reports on the collection and spending of monies through the Community Infrastructure Levy (CIL) and S106 developer contributions.

Legal implications

38. The publication and content requirements of the AMR (Appendix 1) are set out in section 35 of the Planning and Compulsory Purchase Act 2004 and regulation 34 of the Town and Country Planning (Local Planning) (England) Regulations 2012.
39. The requirements for the publication and content of the IFS (Appendix 2) are set out in Regulation 121A and Schedule 2 of the Community Infrastructure Levy Regulations 2010 (as amended).

Level of risk

40. A risk assessment has been undertaken and the risk register is attached (Appendix 3).

Equalities impact

41. Please refer to Equalities Impact Report (Appendix 4).

| | |
|----------------------------|----------------------------------------------------------------------------------------------------------------------------------------|
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Background Papers: None

Authority Monitoring Report

1st April 2024 to 31st March 2025

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Providing a world-class city for everyone



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Chapter 1: Introduction

- 1.1 Oxford's Authority Monitoring Report (AMR) monitors the implementation and effectiveness of policies in the Oxford Local Plan (OLP) 2036 adopted in June 2020. Regularly reviewing the effectiveness of Oxford's development plan documents (Appendix A) helps to ensure that progress is being made towards achieving the Plan's objectives. Monitoring also helps to identify when policies may need adjusting or replacing if they are not working as intended or if wider social, economic or environmental conditions change. This information is important in shaping our approach to reviewing the Plan and continues to provide an important evidence base for the Oxford Local Plan 2042. The City Council also has a legal duty to monitor certain aspects of planning performance.
- 1.2 S106 and CIL income can be found on the Infrastructure Funding Statement published in December each year¹.

Monitoring Framework

- 1.3 A set of indicators has been developed to provide a framework for monitoring the effectiveness of policies in the Plan. Local authorities are only required to report on specific indicators and as such, the AMR has reported on policies which are key to providing a better understanding of how our city functions and is responding to development. The indicators we are reporting on are those which show significant facts or trends, or are key to delivering the Council's corporate priorities, namely fostering an inclusive economy, delivering more affordable housing, supporting flourishing communities and pursuing a zero carbon Oxford.

Structure of the Monitoring Report

- 1.4 The AMR begins by providing a status report on the production of development plan documents, followed by the monitoring of the policies themselves. This has been structured around the three overarching objectives set out in paragraph 8 of the National Planning Policy Framework (2025):
 - **Economic objective** to build a strong, responsive and competitive economy - the economy, retail, community and infrastructure.
 - **Social objective** to support strong, vibrant and healthy communities - housing, health and community benefits.
 - **Environmental objective** to protect and enhance our natural, built and historic environment - design and heritage, protecting our green and blue spaces and making wise use of our natural resources to secure a good quality local environment.

¹ [Infrastructure Funding Statements](#)

- 1.5 Please refer to the Local Plan glossary should you require any clarification of terminology used within this report.

Chapter 2: Progress on development plan documents and other non-statutory documents

The Local Development Scheme

- 2.1 The Local Development Scheme (LDS) is a project plan that sets out timescales for the preparation and revision of documents in Oxford’s Local Plan (OLP) and other planning policy documents. This monitoring period is covered in the LDS for Oxford which was published in January 2025 and covers the period 2025-2030. It is viewable on the Council’s website at www.oxford.gov.uk/lds. Table 1 below sets out progress against the LDS during the monitoring period.

| Document title | LDS timescale (as relevant to the monitoring period) | Progress during the 2024/25 monitoring year |
|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------|
| Oxford Local Plan 2036 | Adopted June 2020 | Policies in use in decision making on planning applications. |
| Adopted Policies Map | Adopted June 2020 | Reflects the adopted policies in the OLP 2036. |
| Oxford Local Plan 2042 | An early engagement consultation survey was open for six weeks, running from 17/03/25 to 28/04/25. (N.B. Further engagement was held later in 2025 and will be reported on in next year’s AMR) | Early engagement to inform the 2042 local plan regulation 18 consultation. |

Table 1: Progress against Local Development Scheme timescales in 2024/25

Duty to Co-operate

- 2.2 The Duty to Co-operate, introduced by the Localism Act 2011, requires on-going, constructive

collaboration and active engagement with neighbouring authorities and other statutory bodies when preparing Local Plan documents.

- 2.3 The City Council has also been actively involved in several on-going joint-working and partnership relationships, which help to provide a shared evidence base for plan making and addressing strategic and cross-boundary issues. This includes the Oxfordshire Leaders Joint Committee (formally the Oxfordshire Leaders Joint Committee/Oxfordshire Growth Board); and the Oxfordshire Local Enterprise Partnership (LEP); Engagement with other stakeholders about Duty to Co-operate matters is very important in the development of the Oxford Local Plan 2042, and commentary about these processes is provided in more detail in the General Statement of Common Ground for Duty to Co-operate².
- 2.4 This detailed Duty to Co-operate Statement is a live document kept updated as the Local Plan continues, as discussions progress and evidence is produced. It forms part of the evidence base published for the Local Plan submission. In addition to this general statement, Statements of Common Ground (SoCG) have been and will be produced with individual district authorities, the County Council and other statutory bodies, and published on the Council's website³.

Neighbourhood plans

- 2.5 The 2011 Localism Act introduced new powers for communities that enable them to be directly involved in planning for their areas. Neighbourhood planning allows communities to come together through a parish council or neighbourhood forum to produce a Neighbourhood Plan.
- 2.6 The Littlemore Regulation 16 consultation for its Neighbourhood Plan finished on the 9th December 2024. Although outside the monitoring period, it is notable that the examination was held in April 2025.

Consultations

- 2.7 During the monitoring year the following consultations took place:

² General Statement of Common Ground for [Duty to Co-operate – live document \(August 2023\)](#)

³ <https://www.oxford.gov.uk/downloads/download/544/downloads-for-local-plan-2040-examination---006-com--statements-of-common-ground-and-duty-to-cooperate>

2.8 Oxford Local Plan 2042 – Early Engagement Survey

| | |
|--------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Consultation dates: | 17 Mar 2025- 28 Apr 2025 |
| Summary of what we did: | <p>The early engagement survey was designed to gather local input to help shape the Local Plan 2042. The feedback will be used to review previous consultation materials, background studies, and evidence base documents. This takes feedback for the development of options for addressing key issues within the broader planning framework.</p> <p>Following this initial survey, the drafting of the Local Plan 2042 will continue to involve all of Oxford’s communities and stakeholders. Future consultations in 2025 will include the formal “Preferred Options” (Regulation 18) consultation, where any concerns or questions can be raised, and the “Submission” (Regulation 19) consultation on the final draft of the plan. After these consultations have been conducted, the plan will be submitted for public examination by the Planning Inspectorate.</p> |

Chapter 3: Fostering an Inclusive Economy

Employment sites

- 3.1 Oxford is a highly constrained city and the competing demands on the limited land supply are strong, particularly for housing but also for employment floorspace. Policy E1: Employment sites, sets out the approach to establish a balance whereby the employment sites that are well performing and positively contribute to the city's economy will be given protection from the loss of floorspace, without overly compromising the capacity for the delivery of much needed housing. There is some flexibility within the policy to allow for potential changes in circumstance, and to ensure the strongest employment base possible, which will sometimes rely on the ability to develop supporting uses. Existing employment sites which are not performing well, or which make inefficient use of land will be encouraged to modernise, to better utilise the space. In some limited circumstances, such sites which will also be considered for alternative uses.
- 3.2 As such, Policy E1 sets out a hierarchical approach to employment categories, stating how existing employment sites will be supported to ensure appropriate levels of protection and intensification. The sites range from Category 1 and 2 sites, which are afforded most protection, to Category 3 and B8 uses which have more flexibility and potential to be released from employment uses for other purposes to ensure the best use of land. Policy E1 permits residential development on all categories of employment sites, subject to adherence with Local Plan policies

Permissions involving net loss of Category 1 and 2 employment floorspace

- 3.3 Two permissions have been granted within the monitoring period resulting in the loss of category 2 employment floorspace (Table 2).

| Application reference | Site location | Development summary | Net loss of office/other employment floorspace (sqm) | Summary of alternative use |
|-----------------------|----------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|----------------------------|
| 24/02001/FUL | 7 King Edward Street Oxford Oxfordshire OX1 4HS | Change of use of part ground, 1st, 2nd, and 3rd floors from offices (Use Class E) to student accommodation (Sui Generis) | -100 | Sui Generis |
| 24/00978/FUL | 79 - 82 Magdalen Road, Oxford, OX4 1RE | Change of use from E(g) to C3 | -261 | C3 |

Table 2: Permissions involving net loss of category 1 and 2 employment floorspace 2024/25

Permissions involving net loss of Category 3 and other employment floorspace

- 3.4 There were 9 permissions that involve the loss or change of use of 3,135.1m² of Category 3 and other employment floorspace are shown in Table 3 below.

| Application reference | Site location | Development summary | Net loss of office/other employment floorspace (sqm) | Summary of alternative use |
|-----------------------|----------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|----------------------------|
| 23/01895/FUL | 1A Southmoor Road, Oxford, OX2 6RG | Demolition of existing workshop, office and storage buildings; alteration and extension of existing Joinery Workshop; change of use of Joinery Workshop from General Industrial (Use Class B2) to Dwellinghouse (Use Class C3); erection of 1 no. new dwelling | -615 | C3 |
| 24/01848/FUL | Studios D And E The Lion Brewery St Thomas Street Oxford Oxfordshire | Change of use from Commercial Office (Use Class E(g)(i)) to Dwellinghouse (Use Class C3) | -49.5 | C3 |
| 24/02066/FUL | Works Crescent Road Oxford Oxfordshire OX4 2PB | Change of use from light industrial use (Class E (g)(iii)) to residential dwellings (Use Class C3). Erection of a first floor rear extension and redevelopment of existing building to create 4 x 1 and 5 x 2 bedroom flats (Use Class C3) | -548 | C3 |
| 24/02750/EC56 | Dental Surgery 50 Blackbird Leys Road Oxford Oxfordshire OX4 5HP | Application for prior approval for change of use from Commercial, Business and Service (Use Class E) to create a 1 x 3 bed dwellinghouse (Use Class C3) | -87 | C3 |
| 24/03038/EC56 | 32 - 35 St Ebbe's Street Oxford Oxfordshire OX1 1PU | Application for prior approval for change of use of the first, second and third floor space from Commercial, Business and Service (Use Class E) to create 1 x 2 and 2 x 3 bed dwellinghouses (Use Class C3) | -407.6 | C3 |
| 25/00130/EC56 | Cranbrook House 287 - 291 Banbury Road Oxford Oxfordshire OX2 7JQ | Application for prior approval for the change of use of the ground, first and second floor space from Commercial, Business and Service (Use Class E) to create 9 x 1-bed and 3 x 2-bed flats (Use Class C3) | -665 | C3 |

| | | | | |
|-------------------|---------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|----|
| 24/00334/FUL | 3 - 7 New Inn Hall Street, Oxford | Change of use of the second floor of Thomas Hull House from office (Use Class E(g)(i)) to Middle Common Room (Use Class F1) in connection with St Peter's College | -276 | F1 |
| 24/01215/ECF56 | 18 New Inn Hall Street, Oxford, OX1 2DW | Application for prior approval for change of use of part first floor from office (Use Class E) to 1 x 2 bed flats (Use Class C3) | -73 | C3 |
| 24/01392/FUL | Oise House, 38 Binsey Lane, Oxford, OX2 0EY | Change of use from offices (Use Class E(g)(i)) to education (Use Class F1) | -414 | F1 |
| Total loss | | | 3,135.1 | |

Table 3: Permissions involving net loss of employment floorspace of Category 3 and other sites 2024/25

3.5 Permissions have been granted for new office uses during the monitoring period. The net gain in floorspace has been derived from a combination of new structures, conversion or through a change of use. Table 4 shows the number of permissions involving net gain in new office floorspace:

| Application reference | Site location | Development summary | Net gain of office/other employment floorspace (sqm) |
|-----------------------|----------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|
| 24/00740/FUL | Salter Brothers Ltd Slipway Building Meadow Lane Oxford Oxfordshire OX4 4BL | Change of use from boat repair workshop (Sui Generis) to mixed use (Use Class E(g)) | 7100 |
| 24/02043/FUL | Ground Floor 4 And Ground Floor And Basement 5 King Edward Street Oxford Oxfordshire OX1 4HS | Change of use from premises falling within mixed use (Use Classes A1-A5) to offices (Use Class E) | 146 |
| 22/03076/FUL | 135 - 137 Botley Road, Oxford | Demolition of existing buildings and replacement with new building comprising R&D, office and cafe space (Use Class E) | 10022 |
| 23/01950/FUL | County Trading Estate, Transport Way, Oxford, OX4 6LX | Demolition of the existing building and construction of a new warehouse with ancillary office area | 623 |

| | | | |
|--------------|-------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|
| 24/00335/FUL | 4200 Nash Court, John Smith Drive, Oxford, OX4 2RU | Demolition of existing office buildings and erection of 1no. laboratory-enabled office building for research and development with ancillary commercial space (all within use Class E) | 5055 |
| 22/02880/RES | Plot 2000 John Smith Drive Oxford Oxfordshire | Erection of 1no. laboratory enabled office building for research and development with ancillary commercial space (all within use class E) | 23373 |
| 24/01434/FUL | Stansfeld Park Quarry Road Oxford Oxfordshire | Erection of a building to accommodate Class Eg (i and ii) (office and research and development) and F1 uses (education) | 1412 |
| 21/00110/FUL | The Clarendon Centre, Cornmarket Street, Oxford, OX1 3JD | Partial demolition of Clarendon Centre, including removal of roof to the mall. Proposed redevelopment involving partial re-use and extension of existing buildings and erection of new buildings to form retail, offices, research and development, and student accommodation, with a new public square and a new pedestrian/cycle access through to Frewin Court | 5106.3 |
| 21/01695/FUL | Thornhill Park, London Road, Headington, Oxford, OX3 9RX | Demolition of The Cottage building. Partial demolition and alterations to Forest Lodge building. Erection of 402 apartments (Class C3), a 133 bed hotel (Class C1), employment provision in the form of offices, with additional mixed use accommodation to include gym, café and restaurant (all within Class E) | 2578 |
| Total | | | 55,415.3 |

Table 4: Permissions involving net gain in new office floorspace 2024/25

Temporary changes of uses

- 3.6 Over the 2024/25 monitoring period, there were no permissions granted for temporary changes of use to new office floorspace.

Applications for changes of use from office to residential which are subject to notification to the council

- 3.7 In 2013 the Government brought into force new permitted development rights which allow the conversion of B1a office space to C3 residential without the need for planning permission.⁴

⁴ This was originally a temporary change introduced by The Town and Country Planning (General Permitted Development) (Amendment) (England) Order 2013. It was then made permanent by The Town and Country Planning (General Permitted Development) (England) (Amendment) Order 2016.

Planning Portal: Permitted Development Rights - <https://www.planningportal.co.uk/ebank-bng/planning-permission/permitted-development-rights>

Permitted Development Rights allow certain types of work without needing to apply for planning permission. Change of use to dwellings require a prior approval application⁵.

- 3.8 Table 5 shows the number of applications, and the number of dwellings, granted and refused prior approval since 2016, the base date of the Local Plan 2036. For prior approvals the City Council could only consider flood risk, land contamination, highways and transport and noise, and could not apply other normal local plan policies in determining the applications.

| Monitoring year | Prior approval required and granted | | Prior approval required and refused | |
|-----------------|-------------------------------------|------------------------------|-------------------------------------|---------------------|
| | Number of applications | Number of dwellings proposed | Number of applications | Number of dwellings |
| 2016/17 | 9 | 113 | 2 | 96 |
| 2017/18 | 3 | 141 | 0 | 0 |
| 2018/19 | 1 | 3 | 0 | 0 |
| 2019/20 | 1 | 2 | 0 | 0 |
| 2020/21 | 8 | 17 | 1 | 3 |
| 2021/22 | 4 | 26 | 2 | 9 |
| 2022/23 | 2 | 2 | 1 | 2 |
| 2023/24 | 6 | 11 | 1 | 1 |
| 2024/25 | 5 | 18 | 1 | 1 |

Table 5: B1a office to C3 residential prior approval decisions 2016/17- 2024/25

Growth of Oxford's universities

- 3.9 The City Council is committed to supporting the sustainable growth of the two universities and thus maximising the related economic, social and cultural benefits which they bring to Oxford. However, it is also recognised that the city is constrained spatially, with limited availability of land within the city boundary and competing demands for development sites in the city for several vital uses, most demonstrably housing. It is therefore important to balance these competing demands through planning policy by encouraging the best use of land and ensuring that the growth of the universities and their associated activities is well-managed and is focused on the most suitable locations.
- 3.10 The Local Plan encourages the universities to focus growth on their own sites, by making the best use of their current holdings by redevelopment and intensification as appropriate. Both institutions have indicated that they have the potential to deliver more of their own needs in this way. This policy approach is set out in Policy E2: Teaching and research, which supports the growth of the universities through the redevelopment and intensification of academic and administrative floorspace on their existing sites. This policy also requires that schemes for all new

⁵ Planning Portal: Prior approval - <https://www.planningportal.co.uk/planning/planning-applications/consent-types/prior-approval>

education, teaching and academic institutional proposals (excluding providers of statutory education) demonstrate how they support the objectives of the wider development plan and align with its other policies.

- 3.11 The other policy approach involves setting a threshold for the number of students that each university is permitted to have living outside of university provided accommodation, which if it is broken the universities cannot increase their academic accommodation that would increase their capacity for taking in students. This approach is set out in Policy H9: Linking the delivery of new/redeveloped and refurbished university academic facilities to the delivery of university provided residential accommodation, which does not permit new, redeveloped or refurbished academic floorspace unless the university has fewer than the threshold number of student numbers living outside of university- provided accommodation. The policy applies to university students on full-time taught degree courses of an academic year or more. These are the categories of student most suited to living in student accommodation.

University student number thresholds

- 3.12 Policy H9 sets threshold figures for full-time taught degree course students to live outside of university-provided accommodation at no more than 1,500 for University of Oxford and no more than 4,000 for Oxford Brookes University.
- 3.13 To inform the AMR the universities provide information relating to their student numbers and the number of student accommodation rooms they provide. The monitoring period that the universities use does not directly coincide with the period of the AMR. The AMR follows the financial year and runs from April to March, whereas the universities use a period linked to the academic year in order to complete their forms for Government. The data used to assess this indicator was submitted by the two universities as relevant to the monitoring year in December 2024.

University of Oxford

- 3.14 The University of Oxford states that there were 26,595 students attending the University (and its colleges) as of 1 December 2024.
- 3.15 A number of agreed exclusions apply to the data:
- Part-time and short-course students (3,861)
 - Students studying a research based post-graduate degree (6,704)
 - Students studying a Further education course or a foundation degree (28)
 - Vocational course students who will at times be training on work placements (145)
 - Students with a term-time address outside of the city (OX1, 2, 3, 4) (315)
 - Students living within the city (OX1, 2, 3, 4) prior to entry onto a course (195)
 - Students not attending the institution or studying at a franchise institution (31)
 - Students studying outside Oxford (-)
 - Specific course exclusions (BTh Theology and MTh Applied Theology) (32)
 - Students who also have an employment contract with the university (-)
 - Students on a year abroad and other placement students away from the university (325)

3.16 Considering these exclusions, there were 14,959 full-time University of Oxford students with accommodation requirements. As of 1 December 2024, there were 14,407 accommodation places provided across the collegiate University. This leaves a total of 552 students the policy applies to living outside of university provided accommodation in Oxford (Figure 1). This is lower than the previous monitoring year and is within the threshold of the Oxford Local Plan 2036 (Policy H9). The University has seen a slight decrease in the total accommodation places from the previous monitoring period (14,603 to 14,407) and in the total number of students attending the university (26,945 to 26,595).

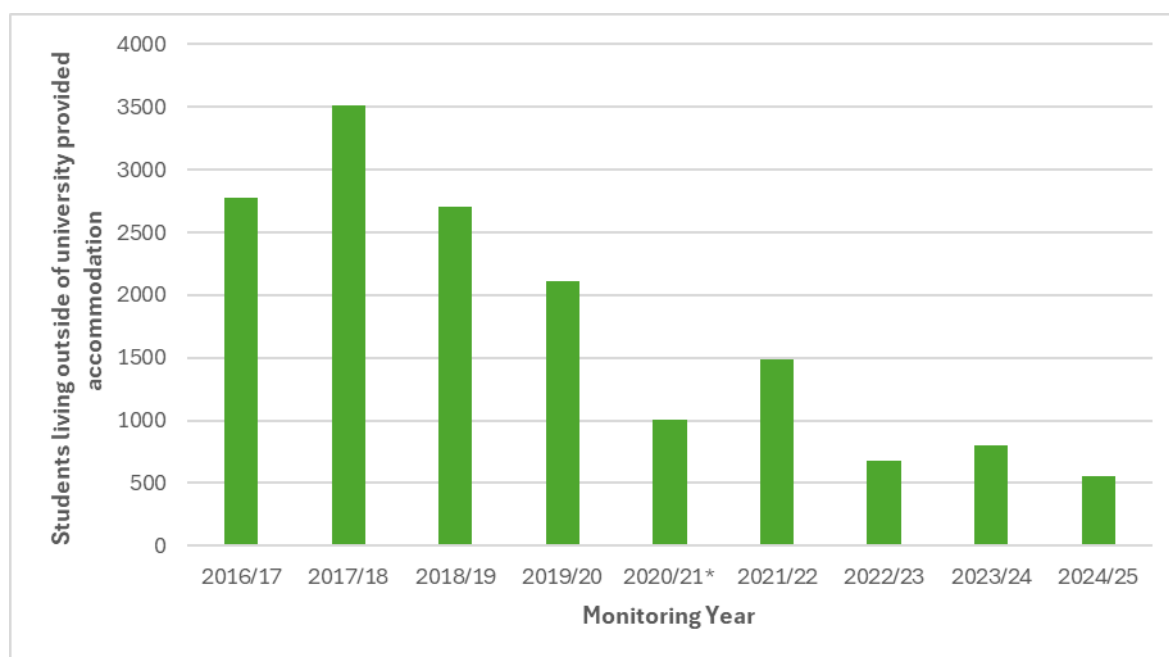


Figure 1: University of Oxford students only living outside of university provided accommodation 2016/17 -2024/25

(*Note: Student numbers contributing to the threshold for 2020/21 onwards have been redefined according to the Local Plan 2036 definition and only include full-time, taught-course students. Please refer to Appendix 3.5 in the Local Plan to see the full list of student exclusions.)

| Monitoring year | Total number of students | Students needing accommodation in Oxford | Units of university provided | Students living outside of university |
|-----------------|--------------------------|------------------------------------------|------------------------------|---------------------------------------|
| 2016/17 | 23,179 | 17,753 | 14,976 | 2,777 |
| 2017/18 | 23,975 | 18,221 | 15,047 | 3,508 |
| 2018/19 | 24,289 | 18,112 | 15,409 | 2,703 |
| 2019/20 | 24,510 | 18,413 | 16,299 | 2,114 |
| 2020/21 | 25,816 | 14,724 | 13,715 | 1,009 |
| 2021/22 | 26,439 | 14,873 | 13,382 | 1,491 |
| 2022/23 | 26,497 | 14,653 | 13,975 | 678 |
| 2023/24 | 26,945 | 15,404 | 14,603 | 801 |
| 2024/25 | 26,595 | 14,959 | 14,407 | 552 |

Table 6: University of Oxford's student numbers 2016/17 – 2024/25

Oxford Brookes University

3.17 Oxford Brookes University states that there was a total of 21,856 students attending the university as of 1 December 2024.

3.18 A number of agreed exclusions apply to the data:

- Part-time students (2,199 students)
- Students on a research-based PG degree (149)
- Students on a Further Education course or foundation degree (102)
- Vocational Course students who will at times during their course be on work-placements (1295)
- Students with a term-time address outside of the city (OX1, 2, 3, 4) (1616)
- Students living within the city (OX1, 2, 3, 4) prior to entry onto a course (391)
- Students studying at franchise institutions⁶ (7336 students)
- Students studying outside Oxford (i.e., Swindon campus) (230 students)
- Placement students away from the university (312 students)

3.19 Taking into account these exclusions, there were 8,226 full-time Oxford Brookes University students with accommodation requirements. As of 1 December 2024, there were 5,094 accommodation places provided by Oxford Brookes University. This leaves a total of 3,132 students without a place in university provided accommodation living in Oxford (Figure 2). It is noted from the University provided data, the occupancy rates of the University provided accommodation was at 90% overall (2024/25), which is lower than previous monitoring years (95% in 2023/24).

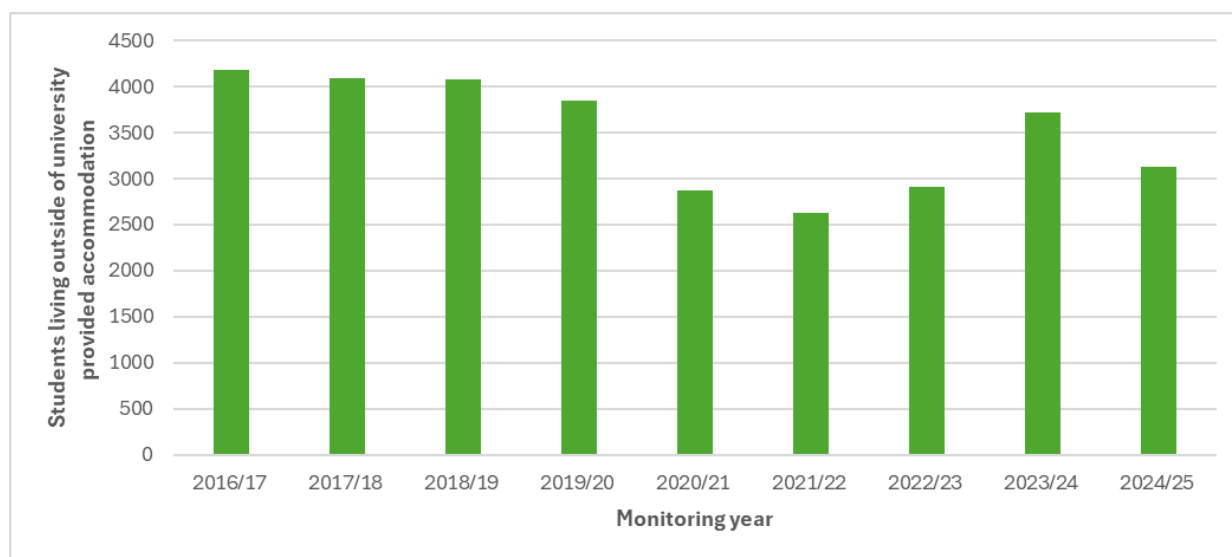


Figure 2: Oxford Brookes students only living outside of university provided accommodation 2016/17 – 2024/25

(*Note: Student numbers contributing to the threshold for 2020/21 onwards have been redefined according to the Local Plan 2036 definition and only include full-time, taught-course students. Please refer to Appendix 3.5 in the Local Plan to see the full list of student exclusions.)

3.20 When compared to the previous monitoring year, there was a decrease in the number of Oxford Brookes students living outside of university provided accommodation in the city in 2024/25. A more detailed breakdown of Oxford Brookes University's student numbers is provided in Table 7. Table 7 also indicates that there has been an increase in the number of University provided student

⁶ The figure includes Global Banking School (GBS) Students. This is a partnership with Oxford Brookes University to provide a BSc in Health, Wellbeing and Social Care for students. The campuses are only based in London, Birmingham, Manchester and Leeds. Therefore, these students are considered to be studying at a franchise/partner institution and are excluded from the calculation of students at Oxford Brookes University requiring accommodation.

accommodation units since the last monitoring year. This is a result of ongoing work at the Clive Booth Student Village site.

| Monitoring year | Total number of students | Students needing accommodation in Oxford | Units of University provided student accommodation | Students living outside of university provided accommodation |
|-----------------|--------------------------|------------------------------------------|----------------------------------------------------|--------------------------------------------------------------|
| 2016/17 | 17,069 | 9,504 | 5,324 | 4,180 |
| 2017/18 | 16,988 | 9,494 | 5,405 | 4,089 |
| 2018/19 | 16,579 | 9,360 | 5,281 | 4,079 |
| 2019/20 | 16,673 | 9,759 | 5,914 | 3,845 |
| 2020/21 | 16,878 | 8,164 | 5,291 | 2,873 |
| 2021/22 | 16,199 | 7,794 | 5,161 | 2,633 |
| 2022/23 | 16,050 | 7,531 | 4,623 | 2,908 |
| 2023/24 | 19,586 | 8,577 | 4,857 | 3,720 |
| 2024/25 | 21,856 | 8,226 | 5,094 | 3,132 |

Table 7: Oxford Brookes University's student numbers 2016/17 – 2024/25

Approved additional academic and administrative floorspace

3.21 Permissions which involve the creation of additional academic and administrative floorspace, which are compliant with the requirements of policies E2 and H9 unless stated otherwise, are shown in Table 8:

| Application reference | Site location | Development summary | Net increase of academic/admin floorspace onsite (sqm) | Compliance with E2 or H9 requirements |
|-----------------------|--------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------|---------------------------------------|
| 24/00334/FUL | 3 - 7 New Inn Hall Street, Oxford | Change of use of the second floor of Thomas Hull House from office (Use Class E(g)(i)) to Middle Common Room (Use Class F1) in connection with St Peter's College | 276 | Yes |
| 22/02849/FUL | Land At Winchester Banbury And, Bevington Road, Oxford | The development of land at Winchester, Banbury and Bevington Road for the provision of student accommodation through the construction of accommodation buildings, a new villa on Bevington Road and the conversion of 43-45 Banbury Road together with a student pavilion building, an academic accommodation building | 11538 | Yes |
| 24/01355/FUL | 37 St Giles', Oxford, OX1 3LD | Change of use from House in Multiple Occupation (Use Class | 139.54 | Yes |

| | | | | |
|--------------|-----------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|-----|
| | | C4) to academic, teaching and office accommodation (Sui Generis). | | |
| 24/01821/FUL | Department Of Physiology , Parks Road, Oxford, OX1 3PT | Demolition of part of the third floor and construction of new rooftop extensions. The refurbishment and reconfiguration of the third floor to allow for the creation a new academic hub with flexible seminar and innovation space, flexible open laboratories, support space and research offices. | 1117 | Yes |
| 24/00650/FUL | St Catherine's College , Manor Road, Oxford, OX1 3UJ | Erection of temporary marquees for use as a lecture theatre on the lawns. | 630 | yes |
| 24/00481/FUL | Oxford Brookes University , Headington Road, Oxford, OX3 0BP | Erection of a temporary educational structure (Use Class F1) | 65 | yes |
| 24/01392/FUL | Oise House , 38 Binsey Lane, Oxford, OX2 0EY | Change of use from offices (Use Class E(g)(i)) to education (Use Class F1). | 414 | yes |
| 24/00854/FUL | Gibson Building Radcliffe Observatory Quarter Woodstock Road Oxford Oxfordshire OX2 6GG | Partial demolition of existing building. Erection of infill extensions and formation of enclosed courtyard. Alterations to roof, fenestration, landscaping, provision of bin and cycle storage and other associated works to create the Oxford Institute of Digital Health (Use Class F1) | 363 | Yes |
| Total | | | 14,542.54sqm | |

Table 8: Approved additional academic and administrative floorspace 2024/25

Ensuring Oxford is a vibrant and enjoyable city to live in and visit

3.22 Oxford provides a wide range of services and facilities to both the city's residents and those living in the wider catchment area, therefore it is important that the vibrancy and vitality of Oxford's city, district and local centres are maintained and enhanced through the plan period. The vision for the Oxford Local Plan 2036 is to continue to build on these strengths and to focus growth in these centres.

3.23 Policy V1 aims to protect the vitality of the city, district and local centres within Oxford. Policies V2 – V4, meanwhile, provide the framework as to what mix of uses, such as retail or food and drink, (and identified through percentages allocated to each use class) would be acceptable

within the shopping frontages of these centres, including the Oxford Covered Market. These policies place a particular emphasis on the minimum proportion of retail units at ground floor level that should be present within each shopping frontage in order to ensure that the function, vitality and viability of each centre is maintained.

V1 - Ensuring the vitality of centres

- 3.24 The Local Plan states that permission will be granted for development of town centre uses within the defined city, district, and local centre boundaries if use is appropriate to both the scale, function, and character of the area. The policy also states that the city centre will continue to be a primary location for retailing as well as other town centre uses. Continuing to provide a wide diversity of uses to shoppers will create an attractive destination for people visiting the city. One means of understanding how the centres are performing in terms of vitality is to assess how many people are using these areas throughout the year.

Adapting to the changes to Use Classes Order

- 3.25 Changes to the Use Classes Order⁷ came into effect on 1 September 2020. Four years have now passed, allowing adaptation to the change to occur. The changes make monitoring of policies based on the former Use Classes referred to in the Local Plan 2036 difficult.

V2 - Shopping frontages in the city centre

- 3.26 Policy V2 sets out how shopping frontages are managed within the city centre. The policy sets out that planning permission will only be granted for proposed development that would not result in the proportion of units at ground floor level in Class A1 or other Class A uses falling below 60% of the total number of units within the defined Primary Shopping Frontage or 40% of units in the rest of the shopping frontage. When applying the policy, in response to the change to the Use Class Order, the threshold required by the Policy to be Use Class A is instead applied to Use Class E. Figure 4 shows that the proportion of E Class Use in the city centre primary frontage is 95.91%, which is an increase from last year (94.74%). Within secondary areas of the city centre E Class uses are down from last year at 75.47% to 74.27%.

⁷ Current Use Classes - updated 1 September 2020:

<https://www.planningportal.co.uk/permission/common-projects/change-of-use/use-classes>

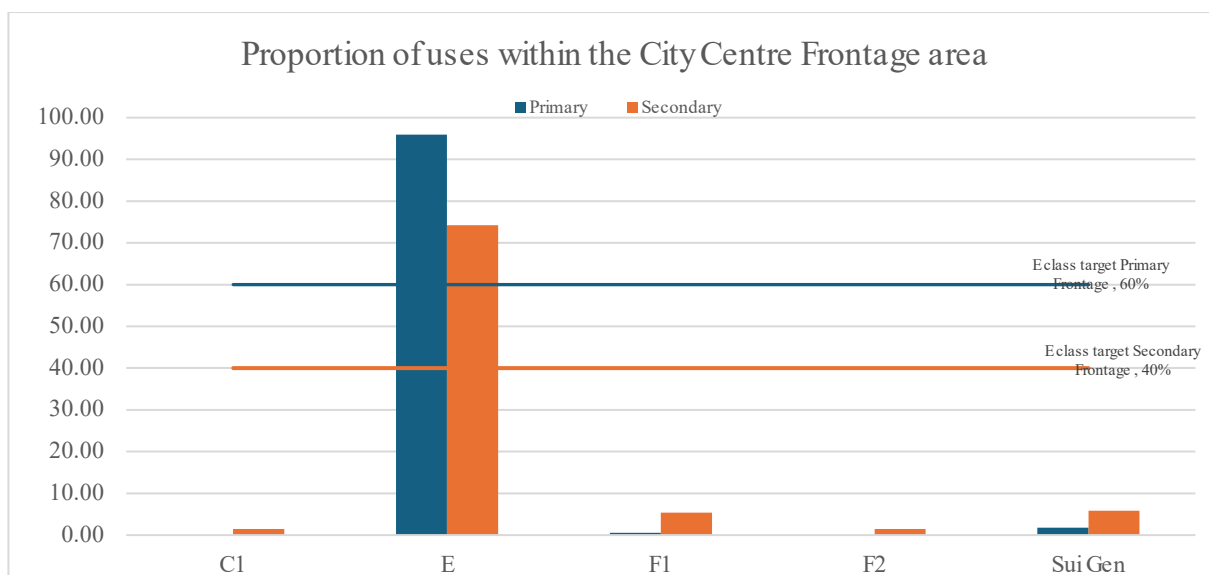


Figure 4: Proportion of uses in the City Centre primary and secondary retail frontages

V3 – Covered Market

3.27 During the 2024/25 monitoring year there were 0 (change of use) applications permitted in the Covered Market.

V4 - District and local shopping centre frontages

3.28 Outside of the city centre area, Oxford’s district and local shopping centre frontages also play an important role in providing a wide range of services across the city.

3.29 In order to help maintain a balance of uses, Policy V4 sets out for each district centre its own individual targets in terms of A1 provision and Class A provision which is now categorised as Class E. Figure 5 shows the percentage of use class share across Oxford’s district centres. Similar to last year’s AMR, Headington, Summertown and Cowley continue to sit above the 85%. East Oxford, predominantly of the Cowley Road and Blackbird Leys are lower in comparison to other district centres, at 81% and 58% respectively.

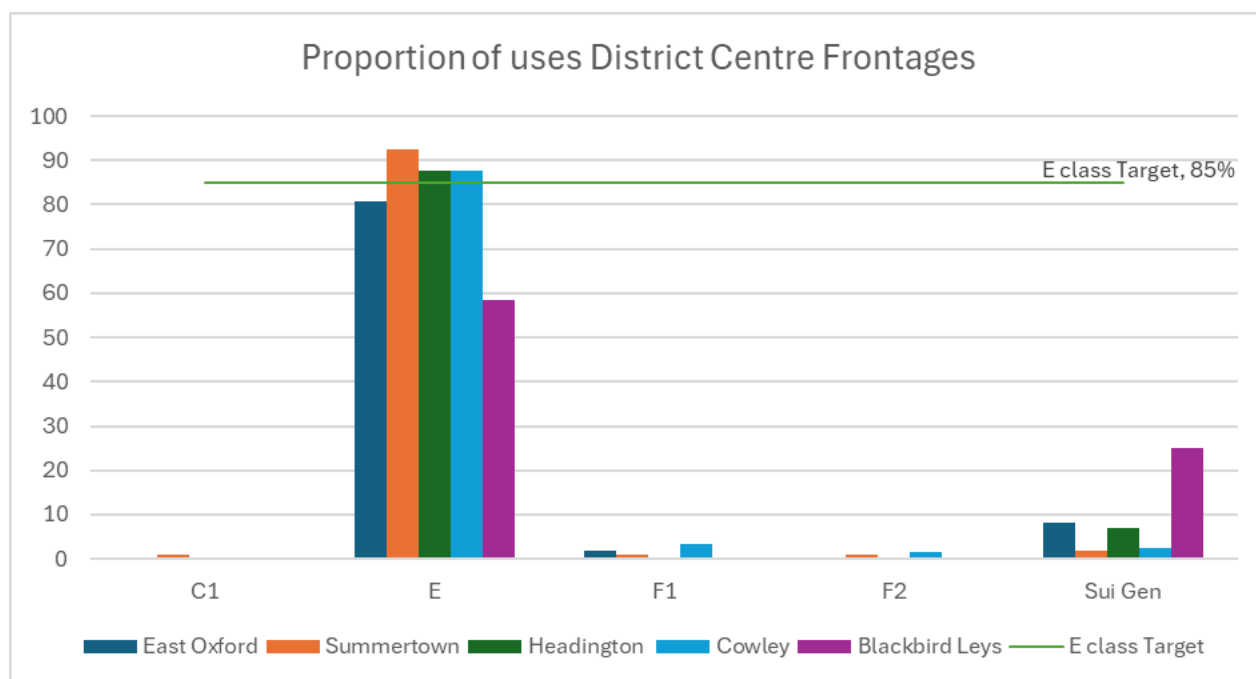


Figure 5: Proportion of uses across Oxford’s district centres retail frontages. Source: Oxford City Council.

Sustainable tourism

Tourism is an important element of Oxford’s economy. The city is world famous and attracts a large number of visitors and many overnight stays; it is a crucial destination of the national tourism industry. Over 9.4m people visited the city centre between September and November 2024 compared to just 8m in the same period of 2023 as shown in the table below.

| Monitoring Period (Sep – Nov) | Number of visitors in the period |
|-------------------------------|----------------------------------|
| 2022/23 | 7,530,926 |
| 2023/24 | 8,027,642 |
| 2024/25 | 9,412,016 |

3.30 Policy V5, ‘Sustainable Tourism’, seeks to encourage development of new tourist accommodation in the most sustainable locations which are not dependent upon the private car and that do not involve the loss of residential dwellings or affect the amenity of neighbours. Policy V5 encourages new tourist attractions in accessible locations well related to existing facilities and where such uses can contribute to regeneration.

3.31 Over the monitoring period, 4 applications were permitted involving short term accommodation, use Class C1 (Table 9). Two of these permissions will result in increases in C1 accommodations.

| Application reference | Site location | Development summary | +/- |
|-----------------------|---------------|---------------------|-----|
|-----------------------|---------------|---------------------|-----|

| Permissions resulting in additional C1 accommodation | | | |
|------------------------------------------------------|-----------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| 21/01695/F UL | Thornhill Park (Nielsen House) | Proposed development of 402 apartments (Class C3), a 133 bed hotel (Class C1), employment provision in the form of an Innovation Centre (2,200 sqm), with additional mixed use accommodation to include office space, gym, café and restaurant (all within Class E) | +133 |
| 24/00768/F UL | 222 London Road Headington | Change of use from House in Multiple Occupation (Use Class C4) to Hotel (Use Class C1) | + 5 |
| Permissions resulting in loss of C1 accommodation | | | |
| 24/00319/F UL | 244 - 246 Iffley Road Oxford | Change of use from Boarding House (Use Class C1) and conversion to create 2 x 6 bed dwelling houses (Use Class C3) | -437.65m2 |
| 24/02812/F UL | 250 Iffley Road Oxford Oxfordshire OX4 1SE | Change of use from hotel/bnb (Use Class C1) to dwellinghouse (Use Class C3) | -8 (-456m2) |

Table 9: Short stay accommodation permissions granted

Chapter 4: Strong, vibrant and healthy communities

Housing completions

4.1 In the 2024/2025 monitoring year, 272 (net) dwellings were completed in Oxford. The cumulative number of dwellings completed in the 9 years since the start of the Local Plan period (2016/17 to 2024/25) is 4417 dwellings (net) with the application of ratios for communal accommodation (student, care and other communal accommodation completions) (Table 10).

| Year | Housing Type | | | | | Total dwellings completed (net) |
|----------------|----------------------------|--------------------------------|----------------------------------------------------------------------------------------|--------------------------------------------------------------|---------------------------------------------------------------------------|---------------------------------|
| | Market Dwellings Completed | Affordable Dwellings Completed | Student Rooms Completed (Number of Equivalent 'dwellings') See table 15 for details | Care Home Rooms Completed (Number of equivalent 'dwellings') | Other communal accommodation Completed (Number of equivalent 'dwellings') | |
| 2016/17 | 284 | 20 | 295 (118) | -6 (-3) | | 419 |
| 2017/18 | 170 | 17 | 452 (180) | 0(0) | | 367 |
| 2018/19 | 158 | 105 | 187 (75) | 36 (20) | | 358 |
| 2019/20 | 118 | 104 | 1337 (535) | 59 (33) | | 790 |
| 2020/21 | 322 | 144 | 628 (251) | -11 (-6) | | 711 |
| 2021/22 | 243 | 274 | 131 (52) | -13 (-7) | 34 (19) | 581 |
| 2022/23 | 142 | 273 | 266 (107) | 0 (0) | 57 (32) | 554 |
| 2023/24 | 280 | 61 | 84 (34) | 0 (0) | -18 (-10) | 365 |
| 2024/25 | 174 | 75 | 55 (23) | 0 (0) | 0 (0) | 272 |
| TOTAL: | 1891 | 1073 | 3435 (1375) | 65 (37) | 73 (41) | 4417 |

Table 10: Net additional dwellings completed broken down by housing type, since the start of the Local Plan period.

4.2 The completed 4,417 dwellings is lower than the 4,643 dwellings (net) projected to be completed by 2024/25 in the Local Plan's housing trajectory. Figure 6 shows the Local Plan housing requirement (based on the stepped trajectory of 475 dwellings per annum between 2016/17 to 2020/21, and 567 dwellings per annum between 2021/22 to 2035/36) and the standard method housing requirement (which is required by the NPPF to be applied from 2025 onwards and supersedes the Local Plan 2036 annual requirement) compared to completions and projections.



Figure 6: Local Plan 2036 housing requirement compared to completions and projections

4.3 Figure 7 provides the same information expressed as a comparison between both the Local Plan 2036 and Standard Method cumulative requirement and cumulative supply over the Local Plan period. From 2025/26 onwards these are projected numbers.

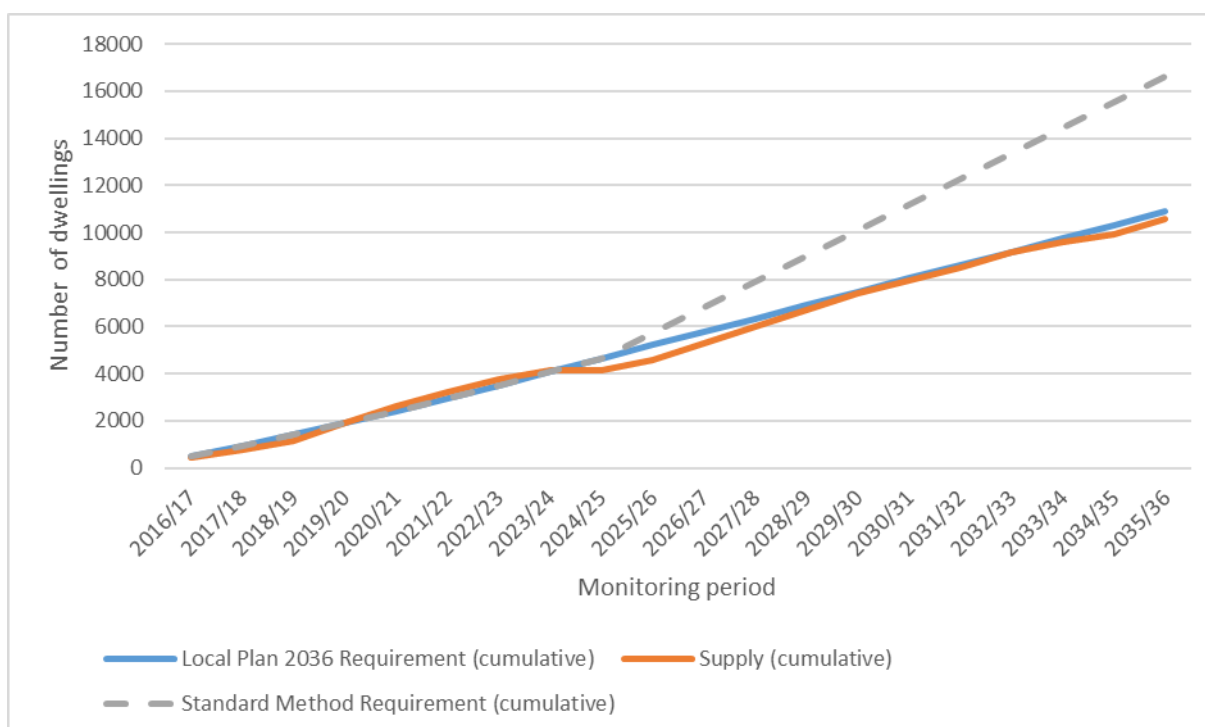


Figure 7: Cumulative Requirement and Cumulative Supply over the whole Local Plan period (including projections from 2025/26).

4.4 Table 10 shows that of the 272 total completions in 2024/25, 75 were affordable dwellings. Table 11 shows a breakdown of the sites that delivered affordable housing during the monitoring year including the affordable tenure:

| Site Location | Planning application reference | No. of affordable homes permitted on the site and tenure split | No. of affordable homes completed in 2024/25 and tenure |
|-----------------------------------------------------------------------------|--------------------------------|-----------------------------------------------------------------|---------------------------------------------------------|
| Barton Park Phase 3 | 19/00518/RES | 83 of 207 (40% affordable) 83 social rent | 18, all social rent |
| Barton Park Phase 4 | 21/02776/RES | 154 of 313 (49% affordable) 137 social rent | 34 all social rent |
| St Frideswide Farm | 21/01449/FUL | 67 of 134 (50%) 56 social rent, 11 shared ownership | 13, all social rent |
| Former Workshop At Lanham Way Oxford Oxfordshire OX4 4PU (Youngs Way) | 21/03114/CT3 | 10 of 10 (100% affordable) 5 social rent, 5 shared ownership | 10 5 social rent, 5 shared ownership |

Table 11: Affordable dwellings completed in 2024/25 including tenure split

Since the start of the Local Plan period (2016/17) there have been a total of 1073 affordable homes built (Figure 8).

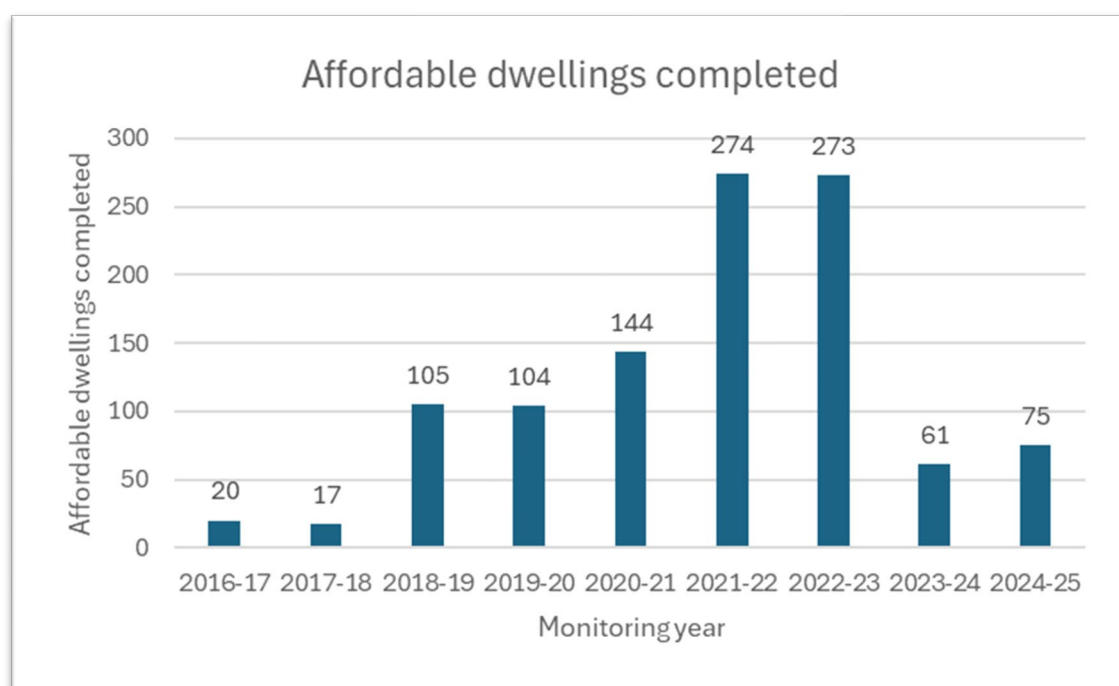


Figure 8: Net affordable dwellings completed 2016/17 - 2024/25

- 4.5 The Council is committed to delivering more affordable housing in Oxford and has been identifying land in its ownership capable of delivering affordable homes and bringing this forward wherever possible. Of the 75 affordable dwellings completed in 2024/25, 62 were delivered on City Council land as set out in Table 12:

| City Council owned site | Planning application reference | No. of homes for social rent completed | No. of homes for intermediate homes completed | No. of homes for shared ownership completed | Total No. of affordable homes completed |
|-----------------------------------------------------------------------|--------------------------------|----------------------------------------|-----------------------------------------------|---------------------------------------------|-----------------------------------------|
| Barton Park Phase 3 | 19/00518/RES | 18 | 0 | 0 | 18 |
| Barton Park Phase 4 | 21/02776/RES | 34 | 0 | 0 | 34 |
| Former Workshop At Lanham Way Oxford Oxfordshire OX4 4PU (Youngs Way) | 21/03114/CT3 | 5 | 0 | 5 | 10 |

Table 12: Affordable homes completed on City Council land (by tenure) 2024/25

Housing delivery on allocated sites

4.6 Since the start of the Local Plan period (2016/17), 9 allocated sites have recorded completions. For the 2024/25 monitoring period, 52 completions on allocated sites were recorded. Allocated sites play a small role relative to the total 272 completions that have occurred this year.

| OLP2036 Site Allocation (SP no.) | Site Name | Planning status | 19/20 total | 20/21 total | 21/22 total | 22/23 total | 23/24 total | 24/25 total | Completions recorded to date |
|----------------------------------|----------------------------------|--------------------|-------------|-------------|-------------|-------------|-------------|-------------|------------------------------|
| SP19 | Churchill Hospital | Completed | 0 | 0 | 19 | 32 | n/a | n/a | 51 |
| SP24 | St Frideswide Farm | Under construction | 0 | 0 | 0 | 0 | 11 | 26 | 37 |
| SP30 | St Catherines College Manor Road | Completed | 31 | 0 | 0 | 0 | n/a | 0 | 31 |
| SP34 | Court Place Gardens, Iffley | Completed | 0 | 0 | 0 | 0 | 35 | n/a | 35 |
| SP41 | John Radcliffe Hospital Site | Under construction | 0 | 0 | 0 | 0 | 30 | 0 | 30* |

| | | | | | | | | | |
|------|------------------------------------------------|--------------------|---|-----|----|-----|-----|-----|-----|
| SP44 | Littlemore Park, Armstrong Road (Newman Place) | Completed | 0 | 0 | 88 | 178 | 7 | n/a | 273 |
| SP47 | Former Nielsen House Conversion | Completed | 0 | 134 | 0 | 0 | n/a | n/a | 134 |
| SP64 | William Morris Close Sports Ground | Completed | 0 | 0 | 86 | 0 | n/a | n/a | 86 |
| SP17 | Headington Hill and Clive Booth | Under construction | 0 | 0 | 0 | 0 | 0 | 26 | 26 |

Table 13 Completions recorded on Local Plan site allocations 2019/20 – 2024/25

(n.b. there were no completions on site allocations between 2016 – 2019).

n.b. The John Radcliffe Hospital Site contains key worker housing, some of which is considered communal accommodation, so a dwelling equivalent ratio is included within the completion figure.

- 4.7 Of the 272 dwellings completed during the 2024/25 monitoring year, 7 dwellings were delivered through the change of use of existing buildings from non-residential to C3 residential. These change of use applications are set out in the table below (Table 14).

| Planning application reference | Type of Change of Use | No. And Tenure completed (net) |
|--------------------------------|--------------------------------|--------------------------------|
| 21/01992/B56 | COU from Offices E(g)(i) to C3 | 3 market |
| 23/01714/FUL | COU from A1 to C3 | 1 market |
| 20/01259/B56 | COU from B1a to C3 | 2 market |
| 24/01278/EC56 | COU from E to C3 | 1 market |

Table 14: Net additional dwellings completed through non-residential to C3 residential changes of use 2024/25

- 4.8 All dwellings delivered through changes of use from non-residential to residential in 2024/25 were market housing. Of the four applications, one required planning permission (23/01714/FUL), with the remaining three submitting an application for a prior approval.

Student accommodation completions

- 4.9 As per Planning Practice Guidance⁸, student accommodation can be counted in housing land supply figures. In the 2024/25 monitoring year 55 (net) units of student accommodation were completed in Oxford (62 rooms (net) at Headington Hill and Clive Booth Student Village and the loss of 7 rooms at Trinity College). Using the ratio of 2.4:1 (as set out in Paragraph 10 of the Housing Delivery Test Measurement Rule Book⁹) the 55 (net) units of student accommodation

⁸ <https://www.gov.uk/guidance/housing-supply-and-delivery#calculating>

⁹ [Housing Delivery Test measurement rule book - GOV.UK](#)

equated to 23 C3 equivalent dwellings to Oxford's housing market (Table 15). This 23 'equivalent dwellings' figure is included within the 272 total dwellings figure shown in Table 10 above.

| <u>Monitoring Year</u> | <u>Number of student rooms completed</u> | <u>Ratio Applied</u> | <u>Number of equivalent 'dwellings'</u> |
|-------------------------------|-------------------------------------------------|-----------------------------|------------------------------------------------|
| 2016/17 | 295 | 2.5:1 | 118 |
| 2017/18 | 452 | 2.5:1 | 180 |
| 2018/19 | 187 | 2.5:1 | 75 |
| 2019/20 | 1337 | 2.5:1 | 535 |
| 2020/21 | 628 | 2.5:1 | 251 |
| 2021/22 | 131 | 2.5:1 | 52 |
| 2022/23 | 266 | 2.5:1 | 107 |
| 2023/24 | 84 | 2.5:1 | 34 |
| 2024/25 | 55 | 2.4:1 | 23 |

Table 15: Student housing completions and equivalent 'dwellings' – 2016/17 – 2024/25

Care home completions

- 4.10 As per Planning Practice Guidance, care homes can be counted in housing land supply figures. In the 2024/25 monitoring year there were no completions resulting in a net gain or net loss of any care accommodation.

Other communal accommodation completions

- 4.11 Other communal accommodation can also be counted in housing land supply figures as per guidance set out in the Housing Delivery Test Measurement Rulebook. In the 2024/25 monitoring year, there were no communal accommodation completions or losses

Housing permissions

- 4.12 Whilst housing completions are important for considering housing supply and delivery, they only show part of the picture. It is also relevant to consider planning permissions to understand the number of dwellings that the City Council is permitting.
- 4.13 Table 16 shows C3 self-contained dwellings permitted (net) since the start of the Local Plan period. This considers C3 dwellings gained and lost through new build completions, demolitions, changes of use and conversions. It includes outline permissions but excludes these where reserved matters have subsequently been permitted to avoid double counting.

| Year | Dwellings permitted (net) |
|-------------|----------------------------------|
| 2016/17 | 304 |
| 2017/18 | 524 |

| | |
|----------------|-------------|
| 2018/19 | 504 |
| 2019/20 | 277 |
| 2020/21 | 278 |
| 2021/22 | 1,346 |
| 2022/23 | 1,209 |
| 2023/24 | 178 |
| 2024/25 | 524 |
| TOTAL | 5144 |

Table 16: Net additional C3 dwellings permitted since the start of the Local Plan period. Note: This does not include dwelling equivalent figures for C2 student accommodation and care home rooms.

- 4.14 Table 16 shows that over the 2024/25 monitoring period, planning permission was granted for 524 C3 residential dwellings. These permissions have been included in the 'cumulative supply' (Figure 7 above). Of the 524 permitted dwellings, 323 are market dwellings and 201 are affordable dwellings.

Affordable housing permissions

- 4.15 Local Plan policy H2 requires a minimum of 50% affordable provision on qualifying self-contained residential development sites, with a capacity for 10 or more dwellings or which exceed 0.5 hectares. At least 40% of the overall number of units on the site should be provided as on-site social rented dwellings. There is no longer the requirement in national policy for First Homes. There has only been 1 residential permission in the 2024/25 monitoring year that met the threshold for applying Policy H2 as shown in Table 17 below. Provision of affordable housing on this site met the policy requirements

| Planning Permission Reference | Site Address | No. of new homes (net) | Affordable Housing Provision | Affordable Tenure (s) |
|-------------------------------|--------------------------------|------------------------|------------------------------|-----------------------------------------|
| 21/01695/FUL | Thornhill Park (Nielsen House) | 402 | 50% | 80% Social Rented; 20% Shared Ownership |

Table 17 Proportion of affordable housing for sites where the affordable housing policy requirement applies (planning permissions) 2024/25

- 4.16 In addition to the application set out in Table 17 above, Policy H2 also requires a financial contribution to be secured towards delivering affordable housing elsewhere in Oxford from new student accommodation of 25 or more student units (or 10 or more self-contained student units). Alternatively, this can be provided onsite where it is agreed that the provision is appropriate. The exception to this is where the proposal is within an existing or proposed

student campus site, or the proposal is for the redevelopment of an existing purpose-built student accommodation site owned by a university to meet the accommodation needs of its students. Over the 2024/25 monitoring period there was one student accommodation application that met the threshold for applying Policy H2; 21/00110/FUL (Clarendon Centre).

Employer-linked affordable housing permissions

- 4.17 Policy H3 allows planning permission to be granted on specific identified sites for employer-linked affordable housing. Over the 2024/25 monitoring period, the Council did not receive or approve any applications for employer-linked affordable housing. This is a very specific housing type, only permissible on a limited number of sites so as to avoid conflict with delivery of Social Rented housing.

Permissions resulting in loss of dwellings (C3)

- 4.18 Local Plan policy H5 seeks to protect Oxford's existing housing stock by resisting the net loss of any dwellings. There is however some flexibility within the policy to allow a loss where there are exceptional justifications. Over the 2024/25 monitoring period, there were 3 applications permitted that result in the loss of dwellings. The first at 37 Ferry Road where permission has been granted for a dwelling to be changed to ancillary accommodation for the Russian Orthodox Parish of St Nicholas (22/02720/FUL). The other two applications (7 Court Farm Road (24/02097/FUL) and 66 Watlington Road (24/02865/FUL)) were permitted for the conversion of C3 dwelling houses to children's residential care homes (use class C2).

Self-build and community-led housing permissions

- 4.19 Community-led housing is one element of the government's agenda to increase supply and tackle the housing crisis. Community-led housing projects can include both group self-build and cohousing. Community-led housing requires meaningful community engagement throughout the process, with the local community group or organisation ultimately owning or managing the homes to benefit the local area or community group. The approach of Policy H7 is to help encourage sufficient self-build and custom housebuilding to come forward to meet demand, to support community-led housing, and to guide applications that come forward for these housing types. Over the 2024/25 monitoring period, the Council did not receive or approve any applications for self-build or community-led housing.

Self and Custom-Build Register

The City Council is required¹⁰ to keep a register of individuals and groups who are seeking to acquire serviced plots of land in Oxford on which to build their own homes. The Planning Practice Guidance encourages authorities to publish headline information related to their Self-build and Custom Housebuilding Registers in their AMRs.

¹⁰ by the Self-build and Custom Housebuilding Act 2015

Over the 2024/25 monitoring year there has been an increase of **4** individuals on the Oxford Self and Custom Build Register and an increase of 2.6 percent in the total number of plots required, as shown in Table 18 below.

| Number of Individuals on the Oxford Self and Custom Build Register | Total number of plots required for all those on the register |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------|
| 136 individuals and 1 association with 20 members (2023/24) 73 people – Part A (a connection to Oxford) 64 Part – B (no local connection to Oxford) | 156 plots (2% increase from previous monitoring year) (2023/24) |
| 139 individuals and 1 association with 20 members (2024/25) 75 people – Part A (a connection to Oxford) 65 Part – B (no local connection to Oxford) | 160 plots (2.6% increase from previous monitoring year) (2024/25) |

Table 18: Oxford’s Self and Custom Build Register Headline Information

Student accommodation permissions

4.20 Over the 2024/25 monitoring year, there were 4 planning permissions that involved the provision of student accommodation. Table 19 below sets out whether these were compliant with the requirements of policy H8 which seeks to limit the provision of new student accommodation to designated sites within the city.

| Application reference | Site location | Development summary | Net increase/decrease of rooms onsite | Compliance with policy H8 criteria |
|-----------------------|-----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------|------------------------------------|
| 22/00409/FUL | Green Templeton College | Demolition of squash courts, gardeners shed, existing porter's lodge and existing accommodation building. Construction of three accommodation buildings to house 51 student study bedrooms, associated communal spaces | 21 | Yes |
| 22/02849/FUL | Banbury Road University Sites (Plot B) | The development of land at Winchester, Banbury and Bevington Road for the provision of student accommodation through the construction of accommodation buildings | 130 | Yes |
| 21/00110/FUL | The Clarendon Centre, Cornmarket Street | Partial demolition of Clarendon Centre, including removal of roof to the mall. Proposed redevelopment involving partial re-use and extension of existing buildings and erection of new buildings to form retail, offices, research and development, and student accommodation, | 40 | Yes |

| | | | | |
|--------------|-----------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|---|-----|
| 24/02236/FUL | Site Of 22 To 23 St Giles' Oxford Oxfordshire | Change of use of from dwellinghouse (Use Class C3) to residential institution (Use Class C2) to provide College accommodation. | 6 | Yes |
|--------------|-----------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|---|-----|

Table 19: Planning permissions issued in 2024/25 for new student accommodation

- 4.21 Local Plan policy H9 seeks to link the delivery of new/ redeveloped and refurbished university academic facilities to the delivery of university provided residential accommodation. This has been considered in the previous Chapter of this AMR (Section 3.9) as it is connected to Policy E2.

Older persons and specialist and supported living accommodation permissions

- 4.22 Local Plan policy H11 sets out criteria against which applications for older persons and specialist and supported living accommodation will be considered. The Policy also indicates that existing extra-care accommodation should be protected unless it is to be replaced elsewhere or it can be shown that it is surplus to requirements. Over the monitoring period there were no applications permitted for older persons or specialist / supported living accommodation.

Housing land supply

- 4.23 The NPPF states that local planning authorities should identify and update annually a supply of specific deliverable sites sufficient to provide a minimum of five years' worth of housing and that the supply of specific deliverable sites should in addition include a buffer of 5% to ensure choice and competition in the market for land. Last monitoring period (2023/24), the City Council reported a 5.93 year housing land supply, as calculated against the housing requirement in the adopted Local Plan. However, the NPPF also states that where local plan policies are more than 5 years old, then this should be measured against the Standard Method calculation of housing need, superseding the housing requirement set out in adopted strategic policies. The Oxford Local Plan 2036 was adopted in June 2020 and so the basis of the calculation has changed this period; the Standard Method housing requirement figure of 1087 dpa is now applied.
- 4.24 The land supply calculations are set out below, also applying the Standard Method housing requirement. The City Council has identified a deliverable supply of 3,289 homes (row G in Table 22 below) for the five year period 2025/26 to 2029/30. This includes the forecast supply from large sites, including those which have been allocated in the Local Plan 2036 and outstanding permissions (commitments), plus a windfall allowance. A 5% buffer has been applied in accordance with Government methodology. This gives a housing land supply of 2.88 years against the Standard Method housing requirement as shown in Table 20.

| | Five-year housing land supply calculation 2025/26 to 2029/30 | Figure |
|----------|--------------------------------------------------------------|------------------------------|
| A | Annual Requirement (using Standard Method calculation) | 1,087 (2025/26 – 2029/30) |
| B | Next 5 years requirement (A (1087 x 5)) | 5,435 |

| | | |
|----------|----------------------------------------------------------------------------------------------------------|------------|
| C | 5-year requirement (with 5% buffer applied) (B x 105%) | 5,707 |
| D | Supply from large sites – (2025/26 – 2029/30) | 2,832 |
| E | Outstanding permissions on small sites of less than 10 dwellings (commitments) (2025/26 – 2027/28) | 233 |
| F | Windfall allowance (2028/29 – 2029/30) | 224 |
| G | Total supply (D+E+F) | 3,289 |
| H | 5-year land supply (including 5% buffer) | 2.88 years |

Table 20: Oxford's housing land supply 2025/26 – 2029/30

- 4.25 When the new Local Plan is adopted, the calculation of the 5yhls will again be recalculated on the basis of the adopted housing requirement, until such a time the Standard Method will be used for this calculation. Had the basis of the calculation continued as in previous years (with the requirement figure from the adopted Local Plan 2036 being used) this would have resulted in a housing land supply of 5.12 years.
- 4.26 The most recent Housing Delivery Test requirements as published by Government (December 2024) showed that the HDT for Oxford had been met, in accordance with NPPF paragraph 78.

Cultural and community facilities

- 4.27 It is important that new development in Oxford is supported by the appropriate infrastructure and community facilities. Providing and improving access to educational, health and community facilities greatly improves the quality of life for residents, builds strong communities and helps to address inequalities. The local plan through Policy V7: Infrastructure and cultural and community facilities seeks to protect existing facilities and will support improvements and more intensive use of existing sites, as well as protect against the loss of such facilities without the provision of new or improved replacements that are similarly accessible. Community facilities can include community centres, schools, children's centres, meeting venues for the public or voluntary organisations, public halls and places of worship, leisure and indoor sports centres, pavilions, stadiums, public houses, club premises or arts buildings that serve a local community.

Permissions for new community facilities

- 4.28 During the monitoring period there was 1 application permitted involving new community facilities and spaces. This was at the Clarendon Centre where permission was granted for mixed use development which included a new public square (Ref number 21/00110/FUL).

Permissions for temporary changes of use

- 4.29 Over the 2024/25 monitoring period, the Council did not receive or approve any applications for temporary changes of use for cultural or community facilities.

Assets of community value

- 4.30 The Community Right to Bid allows defined community groups to ask the Council to list certain assets as being of 'community value'. The Localism Act (2011) and the Assets of Community Value Regulations (2012) set out the opportunities and procedures to follow for communities wishing to identify assets of community value and have them listed. If an asset is listed and then comes up for sale, the right gives communities six months to raise finance and put together a bid to buy it.
- 4.31 If the proposed asset is properly nominated, is in the Oxford City Council administrative area, and meets the definition, the City Council must add it to the List of Local Assets of Community Value and inform all specified parties (including a parish council if relevant). The Council must also place the asset on the local land charges register and, if the land is registered, apply for a restriction on the Land Register. Table 23 sets out the current register of successfully nominated assets of community value.

| Reference | Date nomination requested | Date of decision | Name of Asset | Address of Asset | End of listing period |
|-----------|---------------------------|------------------|------------------------------------------------------|----------------------------------------|-----------------------|
| 20/001 | 13.05.20 | 16.07.20 | The George Inn PH (retained pub land only) | 5 Sandford Road, Littlemore, Oxford | 16.07.25 |
| 20/003 | 04.11.20 | 16.12.20 | Cowley Workers Social Club | Between Towns Road, Oxford, OX4 3LZ | 16.12.25 |
| 22/002 | 04.07.22 | 12.08.22 | Summertown United Reformed Church | 294A Banbury Road, Summertown, Oxford | 12.08.27 |
| 22/001 | 31.03.22 | 26.05.22 | Bullnose Morris PH | Watlington Road, Cowley, OX4 6SS | 26.05.27 |
| 22/003 | 22.11.22 | 20.01.23 | The Prince of Wales PH | 73, Church Way, Iffley, Oxford OX4 4EF | 20.01.28 |
| 25/001 | 31.3.25 | 11.06.25 | Ultimate Picture Palace Community Cinema Ltd (UPPCC) | Jeune Street, Cowley Road, OX4 1BN | 11/06/2030 |

Table 21: Current list of assets of community value

Chapter 5: Oxford’s Historic Environment

Enhancing Oxford’s heritage

- 5.1 Designated heritage assets are protected by statutory legislation. The management of change to them is controlled and guided by national, Government planning policies as well as by local (Local Plan) planning policies and by national and local planning guidance that supports the objectives of those planning policies. Policy DH3 sets out that development proposals and proposals for alterations and changes to heritage assets should not cause harm to the significance, including the setting of a designated heritage asset (listed buildings, registered parks and gardens, scheduled ancient monuments and conservation areas).
- 5.2 Historic England’s ‘Heritage at Risk’ programme identifies the heritage assets that are most at risk of being lost as a result of neglect, decay, or inappropriate development across England. There are three heritage assets in Oxford identified as being at risk according to Heritage England (Table 24) and they are the same as the last monitoring report and no change in status.

| Heritage Asset | Condition | Priority Category |
|--------------------------------------------------|-----------|---------------------------------------------------------------------------------------------------------------------------------------------|
| Church of St Thomas the Martyr, St Thomas Street | Poor | D – Slow decay; solution agreed but not yet implemented. (Previously A) |
| Church of the Holy Family, Blackbird Leys | Very bad | A - Immediate risk of further rapid deterioration or loss of fabric; planning permission has been granted to demolish the Church |
| Minchery Farmhouse, Littlemore - Oxford | Poor | C - Slow decay; no solution agreed |

Table 24: Heritage assets at risk in Oxford (July 2025)

- 5.3 The National Planning Policy Framework requires that local planning authorities should make information about the significance of the historic impact gathered as part of the development management process publicly accessible. As one of the ways to meet this requirement, the City Council produces Archaeological Annual Monitoring Statements¹¹ which provide a short overview of the scope and impact of development-led archaeology in Oxford.

¹¹ [Archaeological Annual Monitoring Statements](#)

APPENDICES

Appendix A: Oxford's planning policy documents

| Document | Date of Adoption |
|----------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------|
| The Development Plan | |
| This includes a number of policy documents that have been prepared and adopted separately. | |
| Oxford Local Plan 2036 | June 2020 |
| Oxford Local Plan 2036 Policies Map | June 2020 |
| Northern Gateway Area Action Plan | July 2015 |
| Barton Area Action Plan | December 2012 |
| Headington Neighbourhood Plan | July 2017 |
| Summertown and St Margaret's Neighbourhood Plan | April 2019 |
| Wolvercote Neighbourhood Plan | June 2021 |
| Supplementary Planning Documents (SPDs) | |
| West End and Osney Mead SPD | November 2022 |
| Technical Advice Notes (TANs) | |
| TAN 1: Housing | January 2021 |
| TAN 2: Employment and Skills | May 2021 |
| TAN 3: Waste Storage | January 2021 |
| TAN 4: Community Pubs | December 2020 |
| TAN 5: Health Impact Assessments | May 2021 |
| TAN 6: Residential Basement Development | January 2021 |
| TAN 7: High Buildings | October 2018 |
| TAN 8: Biodiversity | April 2021 |
| TAN 9: Green Spaces | January 2021 |
| TAN 10: Shopfronts and Signage | July 2021 |
| TAN 12: Car and Bicycle Parking | March 2022 |
| TAN 14: Sustainable Design and Construction | June 2022 |
| TAN 15: Heritage Retrofit Guidance – Energy Efficiency and Carbon Reduction Reductionustainability Guidance for Householders | May 2024 |
| TAN 16: First Homes Policy Statement | March 2022 |
| TAN 17: Botley Road Retail Park Development Brief | October 2022 |
| TAN 18: Biodiversity Net Gain and the Local Plan 2036 | February 2024 |
| Other planning policy documents | |
| Authority Monitoring Report | Produced annually |
| Community Infrastructure Levy Charging Schedule | Revised schedule effective from August 2025. |
| Local Development Scheme | January 2025 |
| Statement of Community Involvement | June 2021 |

Infrastructure funding statement

1st April 2024 – 31st Mar 2025

Published December 2025

Providing a world-class city for everyone



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Introduction

The Infrastructure Funding Statement (IFS) is a report which sets out the amount of developer contributions from the Community Infrastructure Levy (CIL) and Section 106 Agreements (S106) have been **received, allocated and spent** on the infrastructure priorities of Oxford City Council for the previous financial year (**April 2024 - March 2025**). In accordance with the Community Infrastructure Levy Regulations, any authority that receives a contribution from development through the Levy or Section 106 planning obligations must prepare an Infrastructure Funding Statement. (CIL PPG paragraph 173 Reference ID: 25-173-20190901).¹

This IFS is prepared in accordance with Schedule 2 of the CIL regulations² and CIL regulation 121A. Developer contributions were previously monitored on the AMR but now are recorded separately in the IFS.

This Infrastructure Funding Statement Includes:

(CIL PPG Paragraph: 176 Reference ID: 25-176-20190901)

- A report relating to the previous financial year on the Community Infrastructure Levy;
- A report relating to the previous financial year on Section 106 planning obligations;
- A report on the infrastructure projects or types of infrastructure that the authority intends to fund wholly or partly by the levy (excluding the neighbourhood portion).

Funding for infrastructure on the IFS has been considered and updated alongside the Infrastructure Delivery Plan (Infrastructure Assessment). This is a live document which is currently being updated on an ongoing basis to inform future funding priorities.³ (CIL PPG paragraph 17, Reference ID: 25-017-20190901).

¹ <https://www.gov.uk/guidance/community-infrastructure-levy>

² <https://www.legislation.gov.uk/ukxi/2019/1103/schedule/2/made>

³ https://www.oxford.gov.uk/downloads/file/8131/oxford_idp_schedule_for_publication

1: Report relating to financial year 2024/2025 on the Community Infrastructure Levy

| | Community Infrastructure Levy (CIL) | | | | | |
|--|-------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|
| | Requirement | | | Amount | Comment | |
| | 1. | (CIL Regulations: Schedule 2) The matters to be included in the CIL report are— | | | | |
| | A | the total value of CIL set out in all demand notices issued in the reported year; | | £5,139,340.88 | | |
| | B | the total amount of CIL receipts for the reported year; | | £4,950,125.08 | | |
| | C | the total amount of CIL receipts, collected by the authority, or by another person on its behalf, before the reported year but which have not been allocated; | | £0 | | |
| | D | the total amount of CIL receipts, collected by the authority, or by another person on its behalf, before the reported year and which have been allocated in the reported year; | | £14,939,488 | (this does not include CIL allocated to Oxford North infrastructure) | |
| | E | the total amount of CIL expenditure for the reported year; | | £9,156,398.96 | | |
| | F | the total amount of CIL receipts, whenever collected, which were allocated but not spent during the reported year; | | £8,381,983 | CIL is allocated for spend during the Budget setting process for Capital Programme schemes - See part 3: <i>Infrastructure projects to be funded wholly or partly by CIL</i> | |
| | G | in relation to CIL expenditure for the reported year, summary details of— | | | | |
| | | i | the items of infrastructure on which CIL (including land payments) has | £ 8,591,935.88 | | |
| | | | | | Bullington Community Centre | £132,742.00 |
| | | | | | Leisure Centre Capital Works Replacement | £200,000.00 |

| Community Infrastructure Levy (CIL) | | | | | | |
|--------------------------------------------|--|-----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-------------------------------------------------------------------|---------------|
| | | | been spent, and the amount of CIL spent on each item; | | City-Wide Cycling Improvements, including cycle lanes and parking | £23,665.00 |
| | | | | | East Oxford Community Centre | £3,377,322.69 |
| | | | | | New Burial Space | £229,363.81 |
| | | | | | Oxford Station Master Plan | £34,207.04 |
| | | | | | Community Centre Capital Works and Replacement | £78,884.00 |
| | | | | | City Centre Restart | £248.01 |
| | | | | | Blackbird Leys Regeneration | £3,429,042.00 |
| | | | | | Oxford North Developer Works | £950,016.97 |
| | | | | | Cowley Branch Line | £136,444.36 |
| | | ii | the amount of CIL spent on repaying money borrowed, including any interest, with details of the items of infrastructure which that money was used to provide (wholly or in part); | £0 | | |
| | | iii | the amount of CIL spent on administrative expenses pursuant to regulation 61, and that amount expressed as a percentage of CIL collected in that | £118,273.28 | 2.3% (Up to 5% can be used for administration) | |

| Community Infrastructure Levy (CIL) | | | | | | |
|--------------------------------------------|---|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|---------------|---------------------------------------------------|---------------|
| | | | year in accordance with that regulation; | | | |
| | h | in relation to CIL receipts, whenever collected, which were allocated but not spent during the reported year, summary details of the items of infrastructure on which CIL (including land payments) has been allocated, and the amount of CIL allocated to each item; | | See Section 3 | | |
| | i | the amount of CIL passed to— | | | | |
| | | i | any parish council under regulation 59A or 59B; and | £142,551.22 | Parish | Amount |
| | | | | | Littlemore Parish Council | £122,493.06 |
| | | | | | Old Marston Parish Council | £6,951.34 |
| | | | | | Risinghurst & Sandhills Parish Council | £0 |
| | | | | | Blackbird Leys Parish Council | £13,106.82 |
| | | ii | any person under regulation 59(4) | N/A | | |
| | j | summary details of the receipt and expenditure of CIL to which regulation 59E or 59F applied during the reported year including— | | | | |
| | | i | the total CIL receipts that regulations 59E and 59F applied to; | £692,805.87 | NCIL not for PC | |
| | | ii | the items of infrastructure to which the CIL receipts to which regulations 59E | £304,638.58 | | |
| | | | | | CIL payments to ward Councillor budgets | £80,000.00 |
| | | | | | Headington Neighbourhood Forum: | £33,000.00 |

| Community Infrastructure Levy (CIL) | | | | | | |
|-------------------------------------|--|--|--------------------------------------------------------------------------------------------------------------|--|------------------------------------------------------------------------------------------------------------------------------------|-----------|
| | | | and 59F applied have been allocated or spent, and the amount of expenditure allocated or spent on each item; | | Sports Facilities at Bury Knowle Park | |
| | | | | | Headington Neighbourhood Forum: 25 Hanging baskets | £2,937.50 |
| | | | | | Summertown and St Margaret's Neighbourhood Forum: SHARE Oxford – Library of Things | £2,060.00 |
| | | | | | Summertown and St Margaret's Neighbourhood Forum: Diamond Place toilets – decorating doors/frames | £1,877.37 |
| | | | | | Summertown and St Margaret's Neighbourhood Forum: South Parade toilets – decorating doors/frames | £965.10 |
| | | | | | Summertown and St Margaret's Neighbourhood Forum: Junction South Parade/Banbury Rd – removal of sign and erect new signage. | £792.00 |
| | | | | | Summertown & St Margaret's Neighbourhood Forum: Summertown Christmas Lights | £2,220.00 |
| | | | | | Summertown & St Margaret's Neighbourhood Forum: St. Aloysius Bike Project | £4,837.42 |

| Community Infrastructure Levy (CIL) | | | | | | |
|-------------------------------------|--|--|--|--|----------------------------------------------------------------------------------------------------------------------------|-----------|
| | | | | | Summertown & St Margaret's Neighbourhood Forum: Hedgelaying at Burgess Field | £1,875.00 |
| | | | | | Summertown & St Margaret's Neighbourhood Forum: Automatic External Defibrillator (St. Michael's Church Hall) | £1,841.00 |
| | | | | | Summertown & St Margaret's Neighbourhood Forum: Spring bulbs for neighbourhood | £249.99 |
| | | | | | Summertown & St Margaret's Neighbourhood Forum: Cricket nets at Ferry Leisure Centre | £8,292.00 |
| | | | | | Summertown & St Margaret's Neighbourhood Forum: SHARE Oxford PAT tester/safety equipment | £1,593.00 |
| | | | | | Summertown & St Margaret's Neighbourhood Forum: Cherwell School Ecology Garden | £4,369.00 |
| | | | | | | |
| | | | | | Summertown & St Margaret's Neighbourhood Forum: | £579.17 |

| Community Infrastructure Levy (CIL) | | | | | | |
|-------------------------------------|--|--|--|--|------------------------------------------------------------------------------------------------------------------------|------------|
| | | | | | Cotteslowe Larder Allotment Bench | |
| | | | | | Summertown & St Margaret's Neighbourhood Forum: Cotteslowe Minnows – Funding for materials and equipment | £4,500.00 |
| | | | | | Wolvercote Neighbourhood Forum: Cotteslowe Greenhouse | £4,722.00 |
| | | | | | Wolvercote Neighbourhood Forum: White Hart Community Pub | £45,182.70 |
| | | | | | Wolvercote Neighbourhood Forum: Wolvercote Village Hall disabled toilets | £1,850.00 |
| | | | | | Wolvercote Neighbourhood Forum: Wolvercote Primary School (bike shed) | £10,000.00 |
| | | | | | Wolvercote Neighbourhood Forum: EV charging point | £600.00 |
| | | | | | Wolvercote Neighbourhood Forum: Wolvercote Bellringers Simulator Upgrade | £1,794.35 |
| | | | | | Wolvercote Neighbourhood Forum: Allotment to Larder project | £2,163.00 |
| | | | | | Wolvercote Neighbourhood Forum: | £1,287.00 |

| Community Infrastructure Levy (CIL) | | | | | | |
|-------------------------------------|--|--|--|--|--------------------------------------------------------------------------------------------|------------|
| | | | | | Display cabinet for WI centenary banner | |
| | | | | | Wolvercote Neighbourhood Forum: Wolvercote Young People's Club (heating boilers) | £15,306.90 |
| | | | | | Wolvercote Neighbourhood Forum: Wolvercote & Wytham Midsummer Festival | £225.00 |
| | | | | | Wolvercote Neighbourhood Forum: Sound equipment to reduce noise for live music | £2,485.16 |
| | | | | | Wolvercote Neighbourhood Forum: Wolvercote Tree Group | £6,978.77 |
| | | | | | Wolvercote Neighbourhood Forum: Access improvement to St. Peter's Church | £3,985.55 |
| | | | | | Wolvercote Neighbourhood Forum: Wolvercote Village Hall (Seating) | £4,691.58 |
| | | | | | Wolvercote Neighbourhood Forum: North Oxford Youth Theatre ramp | £400.00 |
| | | | | | Wolvercote Neighbourhood Forum: Dandelions Play equipment & coat rack | £400.00 |
| | | | | | Wolvercote Neighbourhood Forum: | £11,338.25 |

| Community Infrastructure Levy (CIL) | | | | | | |
|-------------------------------------|--|--|--|--|------------------------------------------------------------------------------------------------------------------------|------------|
| | | | | | Wolvercote Young Person's Club (Enhancing safety & energy efficiency) | |
| | | | | | Wolvercote Neighbourhood Forum: Cutteslowe Light trail (equipment only) | £4,979.77 |
| | | | | | Wolvercote Neighbourhood Forum: Five Mile Drive Community Speedwatch sign | £498.47 |
| | | | | | Wolvercote Neighbourhood Forum: Community pet scanner initiative | £167.88 |
| | | | | | Wolvercote Neighbourhood Forum: Internal improvements at Wolvercote cricket club | £9,132.00 |
| | | | | | Wolvercote Neighbourhood Forum: Davenant Road Traffic Calming & pedestrian safety (additional work to plans) | £2,643.87 |
| | | | | | Wolvercote Neighbourhood Forum: Wolvercote area CIL programme management (2025) | £3,490.00 |
| | | | | | Wolvercote Neighbourhood Forum: Wolvercote Young People's Club - Fire | £12,610.18 |

| Community Infrastructure Levy (CIL) | | | | | | |
|-------------------------------------|---|-------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|---------------|-------------------------------------------------------------------------------------------------|-----------|
| | | | | | Doors and further upgrades | |
| | | | | | Wolvercote Neighbourhood Forum: North Oxford and District Guides (Scout Hut lighting) | £2,517.60 |
| | | | | | Wolvercote Neighbourhood Forum: Davenant Road Traffic Calming | £3,200.00 |
| | k | summary details of any notices served in accordance with regulation 59E, including— | | | | |
| | | i | the total value of CIL receipts requested from each parish council; | £0 | | |
| | | ii | any funds not yet recovered from each parish council at the end of the reported year; | £0 | | |
| | l | the total amount of— | | | | |
| | | i | CIL receipts for the reported year retained at the end of the reported year other than those to which regulation 59E or 59F applied; | £4,007,502.92 | | |
| | | ii | CIL receipts from previous years retained at the end of the reported year other than those to which regulation 59E or 59F applied; | £8,089,222.41 | | |

| Community Infrastructure Levy (CIL) | | | | | |
|--------------------------------------------|----------|--------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|---------------|-------------------------------------------------------------------|
| | | iii | CIL receipts for the reported year to which regulation 59E or 59F applied retained at the end of the reported year; | £0 | All retained CIL has been forward allocated to projects in j) ii) |
| | | iv | CIL receipts from previous years to which regulation 59E or 59F applied retained at the end of the reported year. | £2,340,410.36 | |
| | 2 | For the purposes of paragraph 1— | | | |
| | a | CIL collected by an authority includes land payments made in respect of CIL charged by that authority; | | N/A | |
| | b | CIL collected by way of a land payment has not been spent if at the end of the reported year— | | N/A | |
| | | i | development (within the meaning in TCPA 1990) consistent with a relevant purpose has not commenced on the acquired land; or | N/A | |
| | | ii | the acquired land (in whole or in part) has been used or disposed of for a purpose other than a relevant purpose; and the amount | N/A | |

| Community Infrastructure Levy (CIL) | | | | | |
|--------------------------------------------|---|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------|-----|--|
| | | | deemed to be CIL by virtue of regulation 73(9) has not been spent; | | |
| | c | CIL collected by an authority includes infrastructure payments made in respect of CIL charged by that authority; | | N/A | |
| | d | CIL collected by way of an infrastructure payment has not been spent if at the end of the reported year the infrastructure to be provided has not been provided; | | N/A | |
| | e | the value of acquired land is the value stated in the agreement made with the charging authority in respect of that land in accordance with regulation 73(6)(d); | | N/A | |
| | f | the value of a part of acquired land must be determined by applying the formula in regulation 73(10) as if references to N in that provision were references to the area of the part of the acquired land whose value is being determined; | | N/A | |
| | g | the value of an infrastructure payment is the CIL cash amount stated in the agreement made with the charging authority in respect of the infrastructure in accordance with regulation 73A(7)(e). | | N/A | |

2: Report relating to financial year 2024/2025 on S106 Planning Obligations

S106 Obligations

| Requirement | Amount | Comment | | | | |
|-------------|--------|-------------------------------------------|--------------------|-------------------|---------------------------------------------------------------|-------------|
| | | Site name | Planning Reference | Date of Agreement | Trigger | Amount |
| | | The Clarendon Centre Cornmarket Street | 21/00110/FUL | 21/06/2024 | Prior to implementation of the planning permission | £57,468.94 |
| | | Land at Thornhill Park, Headington | 21/01695/FUL | 26/09/2024 | Open Space and Leisure/ Green Infrastructure | £79,700.00 |
| | | | | | | £200,000.00 |
| | | 38 - 40 George Street Oxford | 21/01449/FUL | 29/01/2025 | 50% On execution of the agreement and 50% prior to occupation | £6,000.00 |
| | | | | | Prior to first occupation | £3,000.00 |

(CIL Regulations: Schedule 2)
The matters to be included in the section 106 report for each reported year are—

- a the total amount of money payable to Oxford City Council to be provided under any planning obligations which were entered into during the reported year;

S106 Obligations

| Requirement | Amount | Comment | | | | | |
|-------------|---------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------|----------------------------------|-----------------------|--------------------------------------------------------------|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | Waynlete Building, 1-8 St. Clements & 9-13 St. Clements | 24/01344/FUL | 03/04/2025 | Within 10 working days of the Biodiversity Commencement date | £4,921.00 | Towards the costs of the City Council monitoring compliance with the obligations in the Biodiversity Gain Plan and the HMMP |
| | | Site name | Planning Reference | Date Payment Received | Category | Available Balance | Contribution Use |
| b | the total amount of money under any planning obligations which was received during the reported year ; | Oxford North Northern Gateway | 23/00405/OU TFUL | 10/02/2025 | Highway/Transport | £486,725.04 | Bus Enhancement Contribution – paid over to Oxfordshire County Council |
| | | Oxford North Northern Gateway | 23/00405/OU TFUL | 10/02/2025 | Highway/Transport | £4,056.00 | Towards county council monitoring of approved Travel Plan |
| | | Barton Park | 13/01383/OUT (15/03642/RE S) | 16/12/2024 | Community Facilities and Health | £166,000.00 | Provision of the refurbishment and improvement of the Bury Knowle Satellite Surgery or such other healthcare provision that is secured for the benefit of the development at the reasonable election of the City Council |
| | | Northgate House 13-20 Cornmarket Street | 18/00258/FUL and 19/03189/VAR | 26/03/2025 | Economic Development | £200,000.00 | Pedestrian improvements works including but not limited to hard and soft landscaping street furniture and resurfacing works to Market Street in front of the covered market for identification purposes as shown on plan |
| | £856,781.04 | | | | | | |

S106 Obligations

| Requirement | Amount | Comment |
|-------------|--------|---------|
|-------------|--------|---------|

| | | |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------|----|
| c | the total amount of money under any planning obligations which was received before the reported year which has not been allocated by the authority; | £0 |
|---|-----------------------------------------------------------------------------------------------------------------------------------------------------|----|

| | | |
|---|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|
| d | summary details of any non-monetary contributions to be provided under planning obligations which were entered into during the reported year, including details of— | N/A |
|---|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|

| Site name | Planning Reference | Date of Agreement | Trigger | Contribution Use |
|--------------------------------------------------------------------------|--------------------|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------|
| The Clarendon Centre Cornmarket Street Oxford Oxfordshire OX1 3JD | 21/00110/FUL | 21/06/2024 | Prior to implementation of the planning permission to submit for approval the public realm strategy | Public Realm to be made available to the public as all times |
| Land at Thornhill Park, Headington | 21/01695/FUL | 26/09/2024 | Prior to the opening of the Hotel and Innovation Centre to enter into a Community Use agreement for public access | Community Use |
| South Side Oxpens Road Bridge | 23/02506/CT3 | 04/07/2024 | To submit the Biodiversity Scheme to the City Council for its written approval prior to implementation of the Planning Permission To submit the Biodiversity Scheme to the City Council for | Biodiversity Scheme Biodiversity Scheme |

S106 Obligations

| Requirement | Amount | Comment | | | | |
|-------------|--------|--------------------------------------------|--------------|------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|
| | | | | | its written approval prior to implementation of the Planning Permission | |
| | | John Radcliffe Hospital Headley Way | 23/02114/FUL | 14/08/2024 | To submit the Biodiversity Scheme to the City Council for its written approval prior to implementation of the Planning Permission | Biodiversity Scheme |
| | | 38-40 George Street, Oxford | 24/01481/FUL | 29/01/2025 | To submit the Hub Management plan to the City Council for its written approval no later than 3 months prior to the Practical completion of the development and not to cause or permit occupation of the Hub until the Hub Management Plan has been approved in writing by the City Council | Community Enterprise Hub |
| | | | | | No later than 2 month following implementation of the Planning Permission a Community Employment and Procurement | Community Employment and Procurement Plan |

S106 Obligations

| Requirement | | Amount | Comment | | | |
|-------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|-----------------------------------------------------------------------------------------------------------------------------------|---------------------------|--------------------------|-------------------------|
| | | | Plan shall be submitted to and be approved in writing by the City Council | | | |
| | | | Waynlete Building, 1-8 St. Clements & 9-13 St. Clements Biodiversity Monitoring Fee | 24/01344/FUL | 03/04/2025 | Biodiversity |
| | | | To submit the Biodiversity Scheme to the City Council for its written approval prior to implementation of the Planning Permission | | | |
| | | | Site name | Planning reference | Date of agreement | Affordable units |
| i | in relation to affordable housing, the total number of units which will be provided; | 201 | Land at Thornhill Park, Headington | 21/01695/FUL | 26/09/2024 | 201 |
| ii | in relation to educational facilities, the number of school places for pupils which will be provided, and the category of school at which they will be provided; | N/A | Responsibility of Oxfordshire County Council | | | |
| e | the total amount of money (received under any planning obligations) which was allocated but not spent during the reported year for funding infrastructure; | £14,994,315.78 | | | | |
| f | the total amount of money (received under any planning obligations) which was spent by the authority in the reported year (including transferring it to another person to spend); | £1,046,290.11 | See full breakdown in 3(h)(i) | | | |

S106 Obligations

| Requirement | Amount | Comment | | | | | | |
|-------------|----------------|----------------------------------------------|--------------------|-----------------------|----------------------------------------------|-------------|-------------------------------------------------------------------------------|--|
| g | £13,948,025.67 | S106 Contribution Category | | | Amount | | | |
| | | Affordable Housing | | | £12,166,478.39 | | | |
| | | Open Space and Leisure/ Green Infrastructure | | | £867,678.62 | | | |
| | | Community Facilities | | | £403,000.00 | | | |
| | | Highways/ Transport and Travel | | | £227,035.75 | | | |
| | | Economic Development | | | £239,880.00 | | | |
| | | Other (E.g. works of art) | | | £43,952.91 | | | |
| h | £1,046,290.11 | Site name | Planning Reference | Date Payment Received | Category | Amount | Contribution Use | |
| | | Hernes House, 3 Hernes Crescent | 10/02605/FUL | 24/10/2013 | Affordable Housing | £128,000.00 | Towards off-site Affordable Housing | |
| | | Cardinal House, Cardinal Close | 09/01502/CT3 | 28/01/2010 | Open Space and Leisure/ Green Infrastructure | £126.00 | Towards ilprovements to Allotment Facilities within the vicinity of Rose Hill | |
| | | Bury Knowle Park Depot | 13/01814/CT3 | 31/08/2014 | Open Space and Leisure/ Green Infrastructure | £1,666.00 | Indoor/outdoor sports provision | |
| | | Bury Knowle Park Depot | 13/01814/CT3 | 31/08/2014 | Open Space and Leisure/ Green Infrastructure | £573.00 | Towards Improvements to Play Area | |

S106 Obligations

| Requirement | Amount | Comment | | | | | |
|-------------|--------|------------------------------------------------------------|------------------|------------|----------------------------------------------|-------------|----------------------------------------------------------------------------|
| | | East Minchery Farm Allotments, Priory Rd | 13/01610/CT3 | 31/08/2014 | Open Space and Leisure/ Green Infrastructure | £3,719.47 | Towards Improvements to Play Area |
| | | Lawn Upton House, Sandford Rd, Littlemore | 13/00739/FUL | 31/12/2014 | Open Space and Leisure/ Green Infrastructure | £4,316.42 | Towards Open Space/Park Ecology |
| | | Lawn Upton House, Sandford Rd, Littlemore | 13/00739/FUL | 31/12/2014 | Open Space and Leisure/ Green Infrastructure | £202.73 | Towards Improvements to Allotments |
| | | Lawn Upton House, Sandford Rd, Littlemore | 13/00739/FUL | 31/12/2014 | Open Space and Leisure/ Green Infrastructure | £219.24 | Towards Improvements to Play Area |
| | | Land at Greyfriars Court, Paradise Square | 17/00860/FUL | 03/05/2019 | Open Space and Leisure/ Green Infrastructure | £38,000.00 | Towards the future maintenance of Paradise Gardens |
| | | Littlemore Park, Littlemore | 14/02940/OU T | 27/02/2020 | Open Space and Leisure/ Green Infrastructure | £59,320.00 | Towards general sports and Leisure Facilities for public use in Littlemore |
| | | Land known as The Lord Nuffield Club, William Morris Close | 18/00333/OU T | 15/10/2020 | Open Space and Leisure/ Green Infrastructure | £304,879.39 | Towards Leisure Facilities/Sports provision |
| | | East Minchery Farm Allotments, Priory Rd | 13/01610/CT3 | 31/08/2014 | Open Space and Leisure/ Green Infrastructure | £11,114.00 | Towards Indoor Sports Facilities |
| | | Lawn Upton House, Sandford Rd, Littlemore | 13/00739/FUL | 31/12/2014 | Open Space and Leisure/ Green Infrastructure | £2,578.82 | Towards Indoor Sports Facilities |
| | | Oxford North | 18/02065/OU TFUL | 10/02/2025 | Highways/ Transport and Travel | £486,725.04 | Bus Enhancement Contribution paid over to Oxfordshire County Council |

S106 Obligations

| Requirement | Amount | Comment | | | | | |
|-------------|--------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|------------|--------------------------------------|-----------|--------------------------------------------------------------------------------------|
| | | Oxford North | 18/02065/OU TFUL | 10/02/2025 | Highways/ Transport and Travel | £4,050.00 | Travel Plan Monitoring Contribution paid over to Oxfordshire County Council |
| | | the amount of money (received under planning obligations) spent on repaying money borrowed, including any interest, with details of the items of infrastructure which that money was used to provide (wholly or in part); the amount of money (received under planning obligations) spent in respect of monitoring (including reporting under regulation 121A) in relation to the delivery of planning obligations; | | | | | |
| ii | £0 | | | | | | |
| iii | £0 | | | | | | |
| | | the total amount of money (received under any planning obligations) during any year which was retained at the end of the reported year , and where any of the retained money has been allocated for the purposes of longer-term maintenance ("commuted sums"), also identify separately the total amount of commuted sums held. | | | | | |
| i | £0 | | | | | | |
| 4 | | The matters which may be included in the section 106 | | | | | |

S106 Obligations

| Requirement | Amount | Comment |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|----------------------------------------------|
| report for each reported year are— | | |
| summary details of any funding or provision of infrastructure which is to be provided through | | |
| a a highway agreement under section 278 of the Highways Act 1980 which was entered into during the reported year, Summary details of any funding or provision of infrastructure | N/A | Responsibility of Oxfordshire County Council |
| b under a highway agreement which was provided during the reported year. | N/A | Responsibility of Oxfordshire County Council |
| 5 For the purposes of paragraph 3— | | |
| where the amount of money to be provided under any planning | | |
| a obligations is not known, an authority must provide an estimate; | | |
| a non-monetary contribution | | |
| b includes any land or item of infrastructure provided pursuant to a planning obligation; | | |
| Where the amount of money spent in respect of monitoring in | | |
| c relation to delivery of planning obligations is not known, an authority must provide an estimate. | | |

3: Infrastructure projects to be funded wholly or partly by CIL

There is currently £83,690 of CIL that is yet to be allocated on projects/schemes within the Council's Capital Programme as part of the Budget setting process. CIL is used alongside other funding sources to deliver projects and schemes across the city as part of the Capital Programme.

The funding of projects and schemes from CIL is set annually as part of the wider budget setting process for the Capital Programme with minor budget adjustments being made throughout the year, if and when necessary. The programme below sets out how funding from CIL is to be allocated to different infrastructure projects for the reported year and upcoming 5 years - however, this is currently under review. As part of the budget setting process, which at the time of reporting has not yet completed (completion expected Feb/Mar 2026), projects and allocations may change. The following table in this section only shows the funding from CIL and does not show full scheme costs or other funding sources.

Table 3.1 – CIL Capital Programme (October 2025)

| Strategic Projects | Links to wider strategies and Infrastructure Delivery Plan (IDP) | Infrastructure Category | 2024/25 £ | 2025/26 £ | 2026/27 £ | 2027/28 £ | 2028/29 £ |
|-------------------------------------------------------------------|------------------------------------------------------------------|---------------------------------|---------------------|--------------------|--------------------|--------------------|--------------------|
| CIL Balance Brought Forward | | | (14,939,488) | (8,465,673) | (3,292,716) | (2,583,690) | (2,583,690) |
| Oxford and Abingdon Flood Alleviation Scheme | IDP; Oxfordshire Infrastructure Strategy (OxIS) | Green/Blue Infrastructure | | 249,038 | | | |
| Bullington Community Centre | IDP | Community Facilities | 132,742 | | | | |
| B0086 Extension to Seacourt Park & Ride | IDP | Transport/ Highways | | | | | |
| Controlled Parking Zones | IDP, Local Plan, Local Transport Plan (LTP), OxIS | Transport/ Highways | | 443,000 | | | |
| City-Wide Cycling Improvements, including cycle lanes and parking | IDP, Local Plan, LTP | Transport/ Highways | 23,665 | 168,340 | | | |
| East Oxford Community Centre | IDP | Community Facilities | 3,377,322.69 | 2,300,777 | 88,157 | | |
| Blackbird Leys Regeneration | Local Plan | Economic Development | 3,429,042 | | | | |
| Oxford Station Masterplan (Feasibility) | IDP, Local Plan, OxIS | Economic Development, Transport | 34,207.04 | 17,356 | | | |
| City Centre Restart (capital) | COVID-19 City Restart Measures | Economic Development | 248.01 | 39,076 | | | |
| Infrastructure Feasibility Budget | IDP, Local Plan, OxIS | Economic Development, Transport | | 43,350 | | | |
| CPZ Donnington | IDP, LTP, Local Plan | Transport/ Highways | | | | | |
| Old Gas Works Bridges | Oxford City Council | Transport/ Highways | | | | | |
| New Burial Space | IDP, Local Plan | Cemeteries | 229,363.81 | 1,447,636 | 420,869 | | |
| Jericho Community Centre | Local Plan | Community Facilities | | 200,000 | | | |
| Leisure Centre Capital Works and Replacement | Local Plan | Leisure | 200,000 | 193,278 | 200,000 | | |
| Community Centre Capital Works and Replacement | IDP, Local Plan | Community Facilities | 78,884 | 71,116 | | | |

| | | | | | | | |
|--------------------------------------------|-----------------|------------------------|--------------------|--------------------|--------------------|--------------------|---------------------|
| Cowley Branch Line (2028/29) | IDP, Local Plan | Transport/ Highways | | | | | 2,500,000.00 |
| Total Projected Funding | | | 7,505,475 | 5,172,957 | 709,026 | | 2,500,000.00 |
| Total Forecast Receipts in year | | | 883,525 | | | | |
| Balance Carried Forward | | | (8,465,673) | (3,292,716) | (2,583,690) | (2,583,690) | (83,690) |

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Appendix 3 – Risk Assessment

| Risk ID | Risk | | | | | | Corporate Objective | Gross Risk | | Residual Risk | | Current Risk | | Owner | Date Risk Reviewed | Proximity of Risk (Projects/ Contracts) |
|-------------------------------------------|------------------------------------------------------|------------------------|----------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|-----------------|------------------------|------------|---|---------------|---|--------------|---|----------------------------------------------|-----------------------|--------------------------------------------------|
| Category- 000- Service Area Code | Risk Title | Opportunity/ Threat | Risk Description | Risk Cause | Consequence | Date raised | 1 to 5 | I | P | I | P | I | P | | | |
| CEB-001-PS | Reputational risk (Authority Monitoring Report) | T | Failure to achieve planning policy targets | There could be a range of causes, some of which may be external (e.g. the state of the economy) and some internal (failure to properly implement policies) | Reputation of the City Council could be adversely affected in the eyes of the community and stakeholders | 1 November 2025 | 1, 2, 3, 4, 5 | 2 | 1 | 2 | 1 | 2 | 1 | Director of Planning and Regulatory Services | | |
| CEB-001-PS | Reputational risk (Infrastructure Funding Statement) | T | Funding of infrastructure via developer contributions could be perceived as inadequate | There could be a range of causes, some of which may be external (e.g. the state of the economy) and some internal (failure to appropriately assign funding) | Reputation of the City Council could be adversely affected in the eyes of the community and stakeholders | 1 November 2025 | 1, 2, 3, 4, 5 | 2 | 1 | 2 | 1 | 1 | 1 | Director of Planning and Regulatory Services | | |

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Initial Equalities Impact Assessment screening form

Prior to making the decision, the Council's decision makers considered the following: guide to decision making under the Equality Act 2010:

*The Council is a public authority. All public authorities when exercising public functions are required to comply with the Equality Act 2010 which became law in December 2011. In making any decisions and proposals, the Council - specifically members and officers - are required to have **due regard** to the 9 protected characteristics defined under the Act. These protected characteristics are: **age, disability, race, gender reassignment, pregnancy and maternity, religion or belief, sex, sexual orientation and marriage & civil partnership***

The decision maker(s) must specifically consider those protected by the above characteristics:

- (a) To seek to ensure equality of treatment towards service users and employees;*
- (b) To identify the potential impact of the proposal or decision upon them.*

The Council also requires officers to specifically consider whether:

- (A) The policy, strategy or spending decisions could have an impact on safeguarding and / or the welfare of children and vulnerable adults*
- (B) The proposed policy / service is likely to have any significant impact on mental wellbeing / community resilience (staff or residents)*

If the Council fails to give 'due regard', the Council is likely to face a Court challenge. This will either be through a judicial review of its decision making, the decision may be quashed and returned for it to be made again, which can be a costly and time-consuming process for the Council. When considering 'due regard', decision makers must consider the following principles:

- 1. **The decision maker is responsible for identifying whether there is an issue and discharging it.** The threshold for one of the duties to be triggered is low and will be triggered where there is any issue which needs at least to be addressed.*
- 2. **The duties arise before the decision or proposal is made, and not after and are ongoing.** They require **advance** consideration by the policy decision maker with conscientiousness, rigour and an open mind. The duty is similar to an open consultation process.*
- 3. The decision maker must be **aware of the needs of the duty**.*
- 4. The **impact of the proposal or decision must be properly understood first.** The amount of regard due will depend on the individual circumstances of each case. The greater the potential impact, the greater the regard.*
- 5. **Get your facts straight first.** There will be no due regard at all if the decision maker or those advising it make a fundamental error of fact (e.g. because of failing to properly inform yourself about the impact of a particular decision).*
- 6. What does 'due regard' entail?*
 - a. **Collection and consideration of data and information;***
 - b. **Ensuring data is sufficient to assess the decision/any potential discrimination/ensure equality of opportunity;***
 - c. **Proper appreciation of the extent, nature and duration of the proposal or decision.***

7. **Responsibility** for discharging cannot be delegated or sub-contracted (although an equality impact assessment ("EIA") can be undertaken by officers, decision makers must be sufficiently aware of the outcome).
8. **Document the process** of having due regard. Keep records and make it transparent! If in any doubt carry out an equality impact assessment ("EIA"), to test whether a policy will impact differentially or not. Evidentially an EIA will be the best way of defending a legal challenge. See hyperlink for the questions you should consider <http://occweb/files/seealsodocs/93561/Equalities%20-%20Initial%20Equality%20Impact%20Assessment%20screening%20template.doc>
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?

The Oxford Local Plan 2036 is a statutory document that sets the policy framework for development across the city. It sets out policies for the economy, housing, social and the environment. Any development proposal needs to be considered within the light of these adopted policies and a careful balance struck to ensure that no groups are disadvantaged by policies and that the environment is safeguarded and opportunities for environmental enhancement are achieved.

The Infrastructure Funding Statement reports on how developer contributions are spent on Infrastructure items, both at a strategic level and for local communities. Any developer contributions allocated have been considered to deliver infrastructure provision for the benefit of the City, to sustainably mitigate the impacts of development, and to ensure that no groups are disadvantaged by the allocation of funds.

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

This authority monitoring report provides information as to the effectiveness of the policies in the Plan. It is not within its scope to make any changes to adopted policies however it does provide useful information as to the effectiveness of policies which can be fed into plan-making activities.

The Infrastructure Funding statement, likewise, reports on how funds have been allocated to deliver infrastructure needs of the City (summarised on the Infrastructure Delivery Plan). It is not within the scope of the IFS to determine spending priorities, although it does help identify the current position and review progress in terms of delivering the infrastructure needs of the city.

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

N/A

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

N/A

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

N/A

Lead officer responsible for signing off the EIA: Sarah Harrison

Role: Planning Policy Team Leader
Report Author

Date: 4 October 2025

Note, please consider & include the following areas:

- Summary of the impacts of any individual policies
- Specific impact tests (e.g. statutory equality duties, social, regeneration and sustainability)
- Consultation
- Post implementation review plan (consider the basis for the review, objectives and how these will be measured, impacts and outcomes including the “unknown”)
- Potential data sources (attach hyperlinks including Government impact assessments or Oxfordshire data observatory information where relevant)

To: Cabinet
Date: 10 December 2025
Report of: Director Planning and Regulation
Title of Report: Approval of Local Development Scheme 2025-2030

| Summary and recommendations | |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Purpose of report: | To approve the Local Development Scheme 2025-2030, which sets out the work programme for the revised Oxford Local Plan 2045. |
| Key decision: | Yes |
| Cabinet Member: | Councillor Alex Hollingsworth, Cabinet Member for Planning |
| Corporate Priority: | Strong, fair economy Good, affordable housing Thriving communities Zero carbon Oxford A well-run council |
| Policy Framework: | The Local Plan is a statutory requirement, and the LDS sets out the timetable for its production. The scope of the policies is wide and encompasses all of the Council's corporate priorities |

Recommendation(s): That Cabinet:

- Approve the** Local Development Scheme 2025-2030;
- Authorise** the Director of Planning and Regulation Services to make any necessary minor corrections not materially affecting the document prior to publication.
- Agree** the change to the Oxford Local Plan period from 2022-2042 to 2025-2045

| Appendices | |
|------------|------------------------------------|
| Appendix 1 | Local Development Scheme 2025-2028 |
| Appendix 2 | Risk Assessment |

Introduction and background

1. The Oxford Local Development Scheme (LDS, Appendix 1) is a project plan that sets out timescales for the preparation and revision of documents forming part of Oxford City Council's Development Plan, and other planning policy documents. The Local Plan is the name for the document that contains the majority of the Council's statutory planning policies. The focus of the work programme set out in the LDS 2025-2030 is the Oxford Local Plan 2045.
2. The LDS provides details on what the Development Plan documents will contain and the geographical area they will cover. The LDS is an important tool to enable local communities and interested parties to keep track of the Development Plan documents' progress and to ensure that they are aware of when opportunities for involvement are likely to arise. It is a statutory requirement that all local planning authorities prepare and maintain a LDS. The LDS 2025-2030 will come into effect from the date of approval and will supersede the existing first version of the LDS 2025-2030. The Oxford Local Plan 2045 will be prepared to that timetable as far as is practicable. Any changes to the LDS timetable will need a further decision of Cabinet.
3. The currently approved and published version of the LDS 2025-2030 needs updating to delay the Regulation 19 submission version, and all subsequent stages, by two months. The Regulation 18 Oxford Local Plan 2042 consultation took place to the scheduled time. However, since that time a decision has been made to change the plan period from 2022-2042 to 2025-2045. This has necessitated an update to the evidence base, which has led to the slight delay.
4. The period for the Oxford Local Plan 2045 has been amended for two reasons. The start date of the plan being 2025 means that this aligns with when the Regulation 18 consultation commenced, and also it means that the new Standard Method for calculating housing need introduced in December 2024 can be applied from the start of the plan period onwards, without it needing to be applied retrospectively for the first years of the plan. The change to the end date of the plan gives a lot more certainty that, on adoption, there will be the stipulated 15 years left to run to the end date of the plan. Given that, once a plan is submitted, the timeline is entirely in the hands of the Planning Inspectorate, and therefore unpredictable, the additional years give more flexibility should the process take longer than anticipated. Both these changes reflect the approach increasingly being expected of plans by the Planning Inspectorate, and amending the date now gives a lot more certainty than being asked to do so during the examination process.

Local Development Scheme for the Oxford Local Plan 2045

5. Because of the previous withdrawal from examination of the Oxford Local Plan 2040, the Oxford Local Plan 2036 remains the extant plan for planning decisions. A key consideration in setting the timeline for the Oxford Local Plan 2045 is that there will be minimal time from the date five years after adoption of the Oxford Local Plan 2036 (which was June 2020) to adoption of the new Local Plan 2045. This is important, because within 5 years from adoption a plan is automatically considered in-date (assuming other conditions are met), but after that it is not.
6. Another key consideration in setting the timeline is that only plans submitted before December 2026 can be examined under the Planning Act 2004. This date is confirmed in the National Planning Policy Framework (NPPF) Consultation dated 24 September 2024. After that date there is very likely to be a new local plan process in place as enabled by the Levelling Up and Regeneration Act, forthcoming secondary legislation, and new national planning policy and guidance.
7. The Oxford Local Plan 2045 will replace the Oxford Local Plan 2036. This document, as well as any neighbourhood plans, will form the statutory Development Plan for Oxford. Following the Council meeting to approve the pre-submission draft of the OLP2045, that draft will be used as a material consideration for development management decisions; its weight will be limited initially, but increases as it proceeds towards adoption.
8. The proposed timetable set out in the LDS would mean only about 7 months between June 2025 and the Council meeting to approve the submission draft of the Oxford Local Plan 2045. The Oxford Local Plan 2016-2036 has sufficient flexibility to deal with a twenty-year period and the policies within it place Oxford in a strong position to manage growth and change effectively over this period. The Oxford Local Plan 2036 will remain a relevant and appropriate plan to guide development in the city until such time as it is replaced.

Financial implications

9. The timetable of the Local Development Scheme has been structured to enable key work to progress whilst minimising financial implications. In particular, much of the existing evidence base and policy drafting from the now withdrawn Oxford Local Plan 2040 is still relevant and can continue to be used.
10. There are exceptions to this as some evidence is being reviewed, in particular Employment Land Needs Assessment (ELNA) and jobs forecasting that took place as part of the Housing and Employment Needs Assessment (HENA), and a Green Belt review to update the work in-line with the revised NPPF. Much of the evidence base and supporting documents can be largely undertaken in house, using existing staff resources, but there will be a need for some technical input.
11. A revised budget has been calculated, and the work can be resourced by existing Planning Policy staff and can be funded by existing Planning Policy budgets and reserves. The financial implications of producing a local plan

include the costs of a local plan Examination (including Counsel's advice periodically throughout the preparation of the plan).

Legal issues

12. The preparation and publication of the Local Development Scheme is a statutory requirement under Section 15 of the Planning and Compulsory Purchase Act 2004 (as amended). The Council is required to monitor compliance with the timescales for document production and their revision set out in the LDS and to make this information publicly available. Compliance with the LDS is monitored and published through the Council's Authority Monitoring Report.

Level of risk

13. A risk assessment has been undertaken (Appendix 2). All risks have been mitigated to an acceptable level.

Equalities impact

14. There are no equalities impacts arising from this report. An Equalities Impact Assessment is not necessary for this report as it merely proposes a timetable for producing a local plan. The Council will continue to monitor equalities impact as the revised local plan is developed.

Carbon and Environmental Considerations

15. The LDS is merely a timetable and work programme, so it does not itself have any environmental impacts.

| | |
|----------------------------|------------------------------------------------------------------------|
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Background Papers: None

Oxford City Council

Local Development Scheme
2025 - 2030

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Introduction

- 1.1. The Planning and Compulsory Purchase Act 2004 introduced the requirement for councils to prepare and maintain a Local Development Scheme (LDS). The LDS specifies which local development documents are to be development plan documents and sets out the work programme for the preparation of documents to be included in the Development Plan. This document supersedes first version of the Oxford 2025-2030 LDS.

What is the Local Development Scheme?

- 1.2. This LDS is a five-year project plan for preparing documents and provides the starting point for the local community, businesses, developers and other interested parties to find out what the City Council's current planning policies are for the area. It includes 'milestones' to inform the public about opportunities to get involved with the plan making process and to let them know the likely dates for involvement. The LDS is published on the City Council's website at www.oxford.gov.uk/lds.

Oxford's Development Plan

- 2.1. Oxford's Development Plan contains a range of documents to guide development within Oxford. Applications for planning permission are to be determined in accordance with the Development Plan unless material considerations indicate otherwise. Council-produced documents within the statutory Development Plan are subject to community and stakeholder involvement, and an independent examination by an Inspector to ensure that the necessary legal requirements for the preparation of the document have been met and the document is 'sound'. All these documents are subject to the European Strategic Environment Assessment Directive and will incorporate a sustainability appraisal to ensure that they accord with the principles of sustainable development. They must be consistent with the National Planning Policy Framework (NPPF).
- 2.2. Supplementary Planning Documents (SPDs) provide further details and guidance to supplement policies. SPDs are adopted by the City Council following public consultation, and are not part of the statutory Development Plan.

Documents in Oxford's Development Plan

- 2.3. Currently, the statutory Development Plan consists of:
 - Oxford Local Plan 2016-2036 (June 2020)
 - Barton Area Action Plan (December 2012)
 - Northern Gateway Area Action Plan (July 2015)
 - Headington Neighbourhood Plan (July 2017)
 - Summertown and St Margaret's Neighbourhood Plan (April 2019)
 - Wolvercote Neighbourhood Plan (June 2021)

Oxford Local Plan 2036

- 2.4. The Oxford Local Plan 2016-2036 was adopted in 2020 and superseded the following documents:
- Saved policies of the Oxford Local Plan 2001-2016 (November 2006)
 - Oxford Core Strategy (March 2011)
 - Sites and Housing Plan (February 2013)
- 2.5. The Adopted Policies Map (2020) illustrates graphically the policies and proposals of the adopted Local Plan. The Policies Map (2020) reflects the policies of the Oxford Local Plan 2036.

Neighbourhood Plans

- 2.6. The Localism Act introduced new rights and powers to enable communities to get directly involved in planning for their areas. Neighbourhood planning allows communities to come together through a parish council or formal neighbourhood forum and produce a neighbourhood plan. Neighbourhoods can decide what they want to cover in their neighbourhood plan. They may allocate land for development, or influence the type and design of development that comes forward. Neighbourhood plans must however be in general conformity with the strategic planning policies already adopted by the City Council. They should not promote less development than set out in the Local Plan and/or undermine its strategic policies. They are also subject to an independent examination and need to be approved by a majority vote in a local referendum.
- 2.7. Once plans are adopted they will become part of the Development Plan. To date, Oxford City Council has formally designated five neighbourhood areas where plans are being led by neighbourhood forums. Three Neighbourhood Plans, Headington, Wolvercote and Summertown and St Margaret's, are made. Two more are being prepared: Blackbird Leys and Littlemore

Other Documents

- 2.8. In addition to the Oxford Development Plan there are several other important planning documents:
- Community Infrastructure Levy (CIL) Charging Schedule (July 2025)
 - West End SPD
 - Statement of Community Involvement in Planning (June 2021)

Statement of Community Involvement in Planning (SCI)

- 2.9. The Statement of Community Involvement in Planning sets out how the Council will involve the community in the planning process, including Local Plans and Development Management. It sets out the activities that the Council will undertake to reach stakeholders and the public during the various stages of preparation of Local Plan documents. The most recent SCI was adopted at Cabinet on 16th June 2021. It can be viewed at www.oxford.gov.uk/sci.

Annual Authority Monitoring Report

- 2.10. Each year the City Council produces an Authority Monitoring Report, which is approved at the City Cabinet in the autumn. The Authority Monitoring Report has the following main functions:

- to measure progress made in respect of the planning documents being prepared;
- to review the effectiveness of the adopted planning policies;
- to monitor the extent to which policies and targets in adopted documents are being achieved against a range of indicators.

2.11. The most recent Authority Monitoring Reports produced by the City Council can be viewed on the City Council's website at www.oxford.gov.uk/amr.

CIL Charging Schedule

2.12. The Community Infrastructure Levy (CIL) was introduced by the Planning Act 2008 as a tool for local authorities to help deliver infrastructure to support the development of their area, based on the principle that most development has some impact on infrastructure and should contribute to the cost of providing or improving infrastructure. Oxford City Council is the charging authority for the Community Infrastructure Levy in Oxford, meaning it sets and collects the levy, coordinates the spending of the funds and reports on this spending annually.

2.13. Oxford City Council commenced charging CIL on 21st October 2013. The Charging Schedule sets out the tariff per M² of various development types. A partial review of the CIL Charging Schedule, focused on employment floorspace, was adopted on 14th July 2025.

Work Programme for 2025-2030

- 3.1. During the period covered by this LDS, the City Council will commence / continue work on the following documents:

Development plan documents

- Oxford Local Plan 2025-2045
- Neighbourhood Plans

Other documents

- Annual Authority Monitoring Report

Development Plan documents

Local Plan 2025-2045

- 3.2. Government guidance expects that all Plans are reviewed every 5 years. That is to say that the Plan must have been reviewed by the date 5 years after adoption in order for there to be an up-to-date plan. The Local Plan 2016-2036 was adopted on 8th June 2020 and contains policies based on relatively recent evidence. Given that a Local Plan takes considerable time to produce, a review was started a relatively short time after the adoption of the Local Plan 2036. Work began on the Oxford Local Plan 2040 in 2020, with an Issues consultation taking place in 2021. The timetable for this document was set with the intention that it would be adopted by June 2025, five years after the adoption of the Oxford Local Plan 2036. The Oxford Local Plan 2040 was submitted for examination in March 2024, with a recommendation after an initial set of hearings that it be withdrawn.
- 3.3. The withdrawal of the Oxford Local Plan 2040 means that that plan in the form it was previously agreed no longer exists. It must be reviewed, and that review means it is, in legal terms, a different document that must therefore follow all statutory processes. That means that the statutory consultations (Regulation 18 and Regulation 19) must be repeated. However, all the work that went into the Oxford Local Plan 2040 can be built upon, rather than starting again from scratch.
- 3.4. The Regulation 18 consultation took place in June-August 2025. Since that time, the decision has been made to change the plan period from 2022-2042 to 2025-2045. This has necessitated an update to the evidence base, which has led to a slight delay. The Regulation 19 consultation is now scheduled to begin in January 2026, rather than November 2025, with a subsequent 2-month delay to all other milestones.
- 3.5. The Government published a revised NPPF in December 2024. The revised plan will need to follow the new NPPF. Key features of the revised NPPF that are relevant include the move to use only the revised standard method to assess housing need, and the introduction of Grey Belt.
- 3.6. Only plans submitted by December 2026 can be examined under the Planning Act 2004. Changes to the Planning Act 2004 could require a radical new approach that Oxford Local Plan 2045 and its production process may not comply with. There are many other reasons to attempt a very quick turn-around of Regulation

18 and Regulation 19 consultations, not least that it minimises the chance of the evidence-base becoming out of date and needing to be re-done and it minimises the time for which there is no local plan in place that was adopted within the previous 5 years. Within the 5 year period, a plan is considered up-to-date unless it can be shown otherwise. After 5 years, a plan does not automatically become out-of-date, but a review needs to determine the policies are still in-line with national guidance and relevant local circumstances. Undertaking a new plan will help this review process, and the further advanced it is, the greater it will show what in the Local Plan 2036 is still relevant.

- 3.7. The Oxford Local Plan 2045 will replace the Oxford Local Plan 2036. This document, as well as any neighbourhood plans, will form the statutory Development Plan. Following the council meeting to approve the pre submission draft, that draft will be used as a material consideration for development management decisions on planning applications; its weight will be limited initially, but increases as it proceeds towards adoption.
- 3.8. The Oxford Local Plan 2016-2036 has sufficient flexibility to deal with a twenty-year period and the policies within it place Oxford in a strong position to effectively manage growth and change that will face the city over this period. The Local Plan 2036 Inspector's report in paragraph 39 says that: 'the examination hearings took place before the Covid-19 epidemic. Whilst the short-term effects are here for all to see, there is currently no evidence that the fundamental assumptions and requirements of the plan in respect of housing need, or indeed any other strategic matter, will be affected to the extent that its soundness will be undermined.'

Neighbourhood Plans

- 3.9. Two neighbourhood plan areas have been defined but do not yet have a made neighbourhood plan, which are Littlemore, and Blackbird Leys. Work on these will take place during this LDS period. The Summertown and St Margaret's neighbourhood forum is also considering a review of its neighbourhood plan.

Other documents

Annual Authority Monitoring Report

- 3.10. Each year the City Council produces an Authority Monitoring Report. This will be taken for Cabinet approval in December 2025 for publication in December 2025. The Authority Monitoring report published in December 2025 will be reporting on the monitoring year 2024/25.

Appendix 1: Gantt chart of the LDS work programme 2025-2030

| | 2025 | 2026 | | | | | | | | | | | 2027 | | | | | | | | | | | 2028 | 2029 | | |
|--------------------------|------|------|---|---|---|---|---|---|---|---|---|---|------|---|---|---|---|---|---|---|---|---|---|------|------|--|--|
| | D | J | F | M | A | M | J | J | A | S | O | N | D | J | F | M | A | M | J | J | A | S | O | N | D | | |
| Local Plan 2022-2042 | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Annual Monitoring Report | | | | | | | | | | | | | | | | | | | | | | | | | | | |

| | |
|-------------------------------------------|--|
| Start | |
| Publish | |
| Preferred Options Consultation (Reg 18) | |
| Proposed Submission Consultation (Reg 19) | |
| Submit | |
| Inspector's Report* | |
| Adopt* | |

*These are estimates- once the plan is submitted, the timetable is in the hands of the Planning Inspectorate.

Risk Register

(Local Development Scheme)

As at: (12.11.25)

| Ref | Title | Risk Description | Opp / Threat | Cause | Consequence | Risk Treatment | Date Raised | Owner | Gross | | Current | | | Target | | Comments | Control / Mitigation Description | Date Due | Action Status | % Progress | Action Owner |
|-----|------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|-------------|-------------------------------------|-------|---|---------|---|-------|--------|---|-------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------|---------------|------------|--------------|
| | | | | | | | | | P | I | P | I | Score | P | I | | | | | | |
| | Unexpected delays | There is potential for unanticipated delays in document production. | Threat | number, or combination, of factors (for example, external agencies or consultants maybe unable to fit in with timescales, issues may be more complex to understand/resolve than anticipated, or there may be a lack of resources available to complete the | LDS timescales for document production are not met | | 12.11.25 | Director of Planning and Regulation | 3 | 3 | 2 | 2 | 4 | 2 | 2 | Compliance with LDS timescales will be reported in the AMR. | Maintain awareness of potential causes of delay- maintain continuous contact with consultants and managers to check necessary resources are in place and work is being produced to detailed work programmes. | Ongoing throughout the lifetime of the LDS as required | | | |
| | Changes to the planning system at the national level | Changes to national legislation, policy and guidance may alter the process that needs to be followed in producing new documents, or may mean that the focus or approach of documents needs to be altered. | Threat | Changes to national legislation, policy and guidance by central Government. | document production may not be met. The LDS may need to be amended if additional documents need to be reviewed in order to maintain compliance with national policy. | | 12.11.25 | Director of Planning and Regulation | 4 | 4 | 4 | 3 | 2 | 4 | 2 | Compliance with LDS timescales will be reported in the AMR. | Maintain awareness of potential changes at the national level as they arise so that appropriate responses can be planned in advance in order to minimise negative impacts | Ongoing throughout the lifetime of the LDS as required. | | | |
| | | | | | | | | | | | | | 0 | | | | | | | | |
| | | | | | | | | | | | | | 0 | | | | | | | | |

THE RISK REGISTER IS FORMATTED AS A TABLE. PRESS TAB ON THE LAST TABLE CELL TO INSERT A NEW ROW.

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To: Cabinet
Date: 10 December 2025
Report of: Director of Housing
Title of Report: Tenancy Strategy and Tenancy Policy

| Summary and recommendations | |
|------------------------------|-----------------------------------------------------------------------------------------------------------|
| Decision being taken: | Report to Cabinet to recommend to Council approval of the updated new Tenancy Strategy and Tenancy Policy |
| Key decision: | Yes - Issue details - Tenancy Strategy and Tenancy Policy Oxford City Council |
| Cabinet Member: | Councillor Linda Smith, Cabinet Member for Housing and Communities |
| Corporate Priority: | Good, affordable homes |
| Policy Framework: | Housing, Homelessness and Rough Sleeping Strategy 2023 – 2028 |

| |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Recommendation(s): That Cabinet resolves to: |
| <ol style="list-style-type: none"> Approve the draft Tenancy Strategy and Tenancy Policy. Recommend to Council to approve and adopt the draft Tenancy Strategy and Tenancy Policy. Delegate authority to the Director of Housing, in consultation with the Cabinet Member for Housing and Communities, authority to update the Tenancy Strategy and Tenancy Policy with minor amendments to keep the documents up to date with any future changes in legislation, regulations, governance and best practice. |

| Appendix No. | Appendix Title | Exempt from Publication |
|-------------------|----------------------------|-------------------------|
| Appendix 1 | Draft Tenancy Strategy | No |
| Appendix 2 | Draft Tenancy Policy | No |
| Appendix 3 | Equality Impact Assessment | No |
| Appendix 4 | Risk Register | No |

| | | |
|-------------------|------------------------------------------------------------------|----|
| Appendix 5 | Tenancy Strategy and Tenancy Policy Consultation Survey Response | No |
|-------------------|------------------------------------------------------------------|----|

Introduction and background

1. The Council is both a strategic housing authority and a registered provider of social housing for tenants of the Council and has a duty to publish a Tenancy Strategy as a strategic housing authority and a Tenancy Policy as a registered provider of social housing and landlord, in accordance with the Localism Act 2011.
2. The purpose of the Tenancy Strategy is to set out the Council's requirements and expectations of all social housing providers operating within the City (including the Council as a social landlord). Under the Localism Act, all Registered Providers (RPs) of social housing are required to have regard to the Tenancy Strategy in their Tenancy Policies and how they are applied for new and existing tenants in Oxford. The Strategy seeks to ensure all social landlords operating within Oxford provide the types of tenancies and support required to meet local housing need and help tenants to successfully sustain their tenancies, remain in their homes and to prevent homelessness.
3. The Council's Tenancy Policy supports the objectives of the Tenancy Strategy, by setting out the Council's own approach to issuing and managing tenancies for its social housing tenants. The policy is for new and existing Council tenants and includes information on the types of tenancy, rent and support the Council will offer and is one of a suite of policies that outline the Council's approach to its tenants as a social landlord.
4. The Council's old Tenancy Strategy and Policy were adopted in 2018 and will be replaced by these new documents. The new strategy and policy reflect the updated priorities of the Council and tenants and comply with the new legislative and regulatory requirement of the Social Housing (Regulation) Act 2023 and Consumer Standards.

Our updated Tenancy Strategy and Policy

5. The new Tenancy Strategy aligns with the aims of other key Council strategies and policies including the Council Strategy 2024-2028, Housing, Homelessness and Rough Sleeping Strategy 23-28 and the Allocations Scheme.
6. The core principles of the new Strategy remain consistent with the Council's longstanding approach to social housing in the City: tenants should be offered secure tenancies, at social rent where possible and receive the support they need to live in their homes (outlined in more detail below). There is a greater emphasis on requesting RPs to ensure there is suitable support in place to help their tenants living in Oxford and to work closely with the Council on tackling issues affecting residents including the prevention of homelessness, Domestic Abuse and Anti-Social Behaviour (ASB) in local neighbourhoods.
7. The key objectives of the Tenancy Strategy (reflected in the Tenancy Policy for new and existing Council tenants) are:

- To promote Oxford City Council's housing vision with a focus on providing secure or assured social tenancies.
 - New social housing tenancies are let at genuinely affordable rents i.e. in line with Social Rent levels ideally or at Affordable Rent capped at Local Housing Allowance (or equivalent measure) levels
 - To reduce the risk of homelessness, promote tenancy sustainment and contribute to the Council priorities of delivering *good affordable homes* and *thriving communities*.
 - To ensure that RPs of social housing have regard to and adhere to the Tenancy Strategy within their own policies and work closely with their tenants and in partnership with the Council to the benefit of the local community
8. Through this Strategy, the Council seeks to work in partnership to make the best use of existing and new social housing built in the City owned by RPs and the Council to be allocated through the Oxford Register for Affordable Housing. Furthermore, to ensure new housing applicants and existing tenants seeking to transfer or in housing need are helped, including those who are homeless, overcrowded or living in unsuitable housing and any tenants willing to downsize and free up larger homes for families in housing need.
 9. The new Strategy and Policy is embedded into the Council's policy framework to comply with the changing legislative and regulatory regime for social housing in England. In recent years the government has increased the regulation of RPs and Councils to drive up the safety and quality of homes and to ensure the tenants' voice is listened to and central in policy development. The Social Housing Regulation Act 2023 and new Consumer Standards 2024 underpin the new regulatory regime administered by the Regulator of Social Housing.
 10. The Tenancy Standard, part of the wider Consumer Standards brought in by the Social Housing (Regulation) Act that social housing landlords must comply with, imposes clear requirements on social landlords in their approach to tenancies. This includes the requirement to publish a clear policy on issuing of tenancies and to outline our approach to areas such as tenure, flexible tenancies, introductory tenancies and succession. The new Tenancy Strategy and Tenancy Policy embed this approach in Oxford, ensuring regulatory compliance.

Tenant, Registered Provider and Public consultation

11. Officers have engaged registered providers, residents (including social housing tenants and prospective tenants) and the wider public in the development of the Tenancy Strategy and Tenancy Policy.
12. The Council ran a public consultation from Monday 29 September 2025 to Sunday 26 October 2025 which included the draft Tenancy Strategy and Tenancy Policy alongside a set of questions which focused on gaining insight into the views of registered providers and residents in key areas of the strategy including security of tenure, rental type, tenancy sustainment, etc..
13. Officers wrote to all registered providers of social housing in Oxford who are participating in the Oxford Register for Affordable Housing (ORAH) partnership. The Council promoted the consultation to all City residents via social media and local press, and specifically to Council tenants in the 'Tenants in Touch' newsletter

and engaged Oxford City Councillors through the regular members newsletter. Officers also promoted the consultation to housing applicants on the Oxford Register for Affordable Housing via the Council's Choice-Based Lettings website used to advertise and let social housing to new and existing tenants.

14. Officers also engaged directly with Oxford City Council tenants through two on-line focus group sessions. Through this process a summary of the proposed changes were presented, and the tenants were given the opportunity to discuss the proposals, raise any queries and suggest any changes or improvements. Tenants in this process were broadly supportive of the Council's proposed approach, including on the issuing of lifetime secure tenancies and seeking to offer social rent whenever possible.
15. Taking into account feedback from the tenants on suggested improvements Council Officers have amended the final documents to include clearer reference to other Policies, Strategies, Guidance and Legislation referenced within Tenancy Strategy and Tenancy Policy and the on-line consultation questionnaire was updated and made clearer.
16. A detailed report of the on-line consultation is included in **Appendix 5**. The questions covered views on the objectives of the Tenancy Strategy and Policy, our strong preference for lifetime secure/assured tenancies offered at social rent level, to provide support to tenants to prevent homelessness and help to those affected by Domestic Abuse and ASB. In addition, views were asked on how easy it was to understand the Tenancy Strategy and Policy.
17. The responses can be split into feedback from RPs of Social Housing, Oxford City Council Tenants and all respondents. Almost 50% of respondents were tenants of the Council, key findings from the consultation include:
 - The responses from the RPs all strongly agreed or agreed with all the proposals and found the Tenancy Strategy and Policy straightforward to understand. With the exception of one RP which was unsure whether lifetime tenancies should be issued to all tenants.
 - The responses from Council tenants also strongly agreed with or agreed with the proposals. The majority also agreed that the Tenancy Strategy and Policy were easy to understand although one disagreed regarding the Tenancy Strategy. Following on from this and feedback from the tenant focus groups this has been reviewed to make it clearer.
 - Overall, the majority of all the respondents strongly agreed or agreed with all the proposals within the Tenancy Strategy and Policy and found both straightforward to follow. Further feedback was also received agreeing with the key aims of supporting tenants in their homes, regular visits to ensure homes were of a decent standard and keeping in contact with tenants to better understand their needs around health and to help older tenants to move to smaller more suitable homes if required. Dealing with ASB was also agreed as a priority and keeping the Tenancy Strategy and Policy under review to ensure they are kept up to date with any changes in legislation.
18. This supports the recommendation to Cabinet to approve the new strategy and policy.

Options considered

18. Recommendation – Approve the draft Tenancy Strategy and Tenancy Policy to ensure the Council is compliant with current legislation and regulations and RPs have a clear decision-making framework related to the issuing of tenancies for new and existing properties.
19. Do nothing – Under this option, the Council would not approve the draft Tenancy Strategy and Tenancy Policy. The Council would risk being non-compliant with legislative requirements under key legislation such as the Social Housing Regulations Act and Consumer Standards.

Financial implications

19. There are no direct financial implications arising from the Tenancy Strategy and Tenancy Policy. The Tenancy Strategy provides a framework for decision making related to issuing and managing tenancies and aims to encourage partnership working and value for money for residents.
20. Any subsequent financial implications arising as a result of the implementation of this Strategy & Policy document will be formally reported / requested through the appropriate governance processes as and when required.

Legal issues

21. Local Authorities are required to issue and review their Tenancy Strategies in line with the Localism Act 2011 (sections 150 and 151). Approval of the updated Tenancy Strategy and Tenancy Policy ensures the Council continues to meet its duties under the Act.
22. The updated documents also ensure compliance and alignment with associated legislation including the Social Housing (Regulations) Act 2023 and Consumer Standards and the Housing Act 1996 (as amended) incorporating the Homelessness Reduction Act 2017.
23. The Council's governance regarding its landlord and strategic housing functions is under review and the monitoring of this strategy may be updated in line with these developments.

Level of risk

24. A comprehensive risk register has been completed as part of this report and can be found in **Appendix 4**.

Equality impact

25. An Equality Impact Assessment has been completed and can be found in **Appendix 3**.

Carbon and Environmental considerations

26. The Strategy does not have direct actions which relate to carbon and environmental impact.

| | |
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Background Papers:

1. Tenancy Strategy and Tenancy Policy 2018 – 2023

[Tenancy Strategy and Tenancy Policy | Oxford City Council](#)

2. Housing, Homelessness and Rough Sleeping Strategy 2023 - 2028

[Housing, Homelessness and Rough Sleeping Strategy 2023 to 2028 | Oxford City Council](#)

Oxford City Council – Tenancy Strategy

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1. Introduction

Oxford City Council (“the Council”) is required to have a Tenancy Strategy in place which sets out the Council’s requirements and expectations of registered providers of social housing operating within the city.

Under section 150 of the Localism Act 2011, all registered providers, including the Council as a social landlord, must have regard to this strategy when formulating policies related to:

- Developing, letting and managing new and existing dwellings in the City
- Formulating or reviewing their tenancy policies and operating procedures affecting tenants in Oxford.

This document updates and replaces Oxford City Council’s Tenancy Strategy 2018-23 and has been informed by key Oxford City housing policies including:

- Housing, Homelessness & Rough Sleeping Strategy 2023-2028
- Housing Allocations Scheme
- Oxford City Council Strategy 2024-2028

This document responds to the national legislative and policy context established by the Localism Act 2011, the Housing Acts of 1985, 1988 and 1996 (including the Homelessness Reduction Act 2017), the Homelessness Act 2002, the Domestic Abuse Act 2021 and the Social Housing (Regulation) Act 2023.

The latter introduced a new system of proactive consumer regulation and a revised set of Consumer Standards in 2024.

The Tenancy Strategy is also complimented by and supports a range of Council policies including the Council’s Domestic Abuse Policy for Service Users and Anti-Social Behaviour Policy.

There are 4 revised consumer standards that social housing providers must adhere to:

- Safety and Quality Standard
- Transparency, Influence and Accountability Standard
- Neighbourhood and Community Standard
- Tenancy Standard

Registered providers should develop their tenancy policies in line with relevant legislation and the Regulator’s expectations as set out in the above standards.

The standards direct registered providers to offer *'tenancies or terms of occupation which are compatible with the purpose of the accommodation, the needs of individual households, the sustainability of the community, and the efficient use of their housing stock'* (s.1.3.1 Tenancy Standard, Consumer Standards 2024)

The Council is committed to ensuring that everyone in the City has access to a safe, secure and affordable home and this strategy provides a framework for tenancy-related decision making across the City.

The Council wants to ensure that social housing is allocated and managed in ways that reduce the risk of homelessness, promotes tenancy sustainment and creates *great homes for all* in line with the Council's Housing, Homelessness and Rough Sleeping Strategy 2023-2028.

The key objectives of the Tenancy Strategy are:

- To promote the Council's housing vision with a focus on providing secure or assured social tenancies.
- New social housing tenancies are let at genuinely affordable rents i.e. in line with Social Rent levels ideally or at Affordable Rent capped at Local Housing Allowance (or equivalent measure) levels
- To reduce the risk of homelessness, promote tenancy sustainment and contribute to the Council priorities of delivering *good affordable homes* and *thriving communities*.
- To ensure that registered Providers of social housing have regard to and adhere to the Tenancy Strategy within their own policies and work closely with their tenants and in partnership with the Council to the benefit of the local community

2. About Oxford City

Oxford is a vibrant, internationally renowned city with a growing population of 165,200 (ONS, June 2023). While celebrated for its rich cultural heritage, world-class education, and economic opportunities, Oxford faces deep-rooted housing challenges. Oxford has long been one of the least affordable places to live in the UK, with a chronic housing shortage reflected in a current affordable housing waiting list of over 3,800 people (as of September 2025), for a new allocation or transfer of social housing. During the 2024/25 financial year, whilst the Council's Allocations Team successfully rehoused 450 households into social housing, the demand far out stripes the current supply.

Housing affordability is a major concern: the average house price now stands at £560,880 - around 12 times the average local earnings (ONS, House price to workplace-based earnings ratio) - placing home ownership well beyond the reach of many. Private rents are similarly unaffordable, making it extremely difficult for low and middle-income households to secure suitable accommodation.

These pressures have significant social consequences. One in four children in Oxford lives below the poverty line once housing costs are accounted for. Ten of the City's 83 neighbourhoods are among the 20% most deprived in England, and 19% of adults have no or low educational qualifications (ONS, 2021 Census).

Meanwhile, population growth, driven by a strong economy and an influx of workers, students, and families—has further intensified demand. Between 2011 and 2021, Oxford's population grew by 6.7% (ONS, 2021 Census), yet housing supply has not kept pace. The Council has limited powers to regulate private rents, meaning many residents face high housing costs and tenancies with little or no security. These challenges underline the urgent need for a sustainable approach to housing that prioritises affordability, stability, and opportunity for all.

3. Tenancy Strategy Aims and context

This strategy aims to promote an accessible framework for all registered providers to work closely with the Council to ensure that affordable housing – existing or new – meets Oxford's housing needs, is truly affordable and creates good quality and energy efficient accommodation.

The Housing, Homelessness and Rough Sleeping Strategy 2023-2028 sets out five key objectives:

Priority 1 - Providing more, affordable homes

Priority 2 - Great homes for all

Priority 3 - Housing for a net zero carbon future

Priority 4 - Preventing homelessness and adopting a rapid rehousing response

Priority 5 - Ending rough sleeping

This tenancy strategy seeks to compliment these objectives and confirms, in addition to providing more affordable homes, preventing homelessness and providing good quality homes as top priorities for the Council, by providing homes rather than just houses, the Council, along with other registered providers and partner agencies, can help to build safe and secure environments that promote stability and create thriving communities.

The Council aims to work closely with registered providers to achieve the best outcomes for residents of Oxford. The Regulator for Social Housing's consumer

standards are clear that registered providers should assist the local authority in achieving their strategic housing function as well as promoting “*social, environmental and economic wellbeing in the areas where they provide social housing*” (s.1.2.1 Neighbourhood and Community Standard, Consumer Standards 2024)

The Council has the strategic responsibility to work in partnership with all registered providers of social housing and has signed a local partnership arrangement under the Oxford Register of Affordable Housing (ORAH) to co-ordinate nominations and allocations of housing, as well as supporting the Council’s aims on promoting tenancy sustainment and preventing unnecessary evictions in line with the Regulator for Social Housing’s Tenancy Standard.

The ORAH partnership compliments the Council’s Allocation Scheme and the pre-eviction protocol the Council has in place with registered providers and aims to promote good practice.

4. Partnership working with Registered Providers

The Council expects all registered providers operating in the city to adopt tenancy policies and management practices that are fully aligned with the principles and priorities set out in this strategy and to continue to work in partnership through regular engagement meetings with the Council and partner agencies to achieve the strategy aims.

The term Registered Providers encompasses:

- Local authorities that are registered providers
- Other bodies, such as housing associations, that have registered with the Regulator (known as ‘Private Registered Providers’)

The Council manages approximately 8,100 homes. Other registered provider partners have approximately 4,100 social housing properties within Oxford that they manage.

The Council acknowledges the use of Introductory or Starter Tenancies for new social housing tenants. Introductory or starter tenancies usually last for 12 months, after the 12-month period, the tenancy will automatically become secure or assured if the tenant has met the tenancy conditions, unless the registered provider decides to seek eviction or extend the introductory or starter tenancy for the prescribed time period.

With Introductory or Starter tenancies, tenants are entitled to almost all the same rights as others, but there are certain limits and less security of tenure in some

areas, for example a tenant in breach of their tenancy can be evicted more easily. These tenancies allow new tenants to demonstrate they can successfully manage their tenancy obligations and there is an expectation that tenants will receive adequate support to manage their tenancy successfully. The Council sets out in its tenancy policy how it implements introductory tenancies for Council tenants.

The expectations of registered providers are to:

- Support the use of “lifetime tenancies” – either secure or assured, are the standard approach and the Council’s preference when issuing a tenancy. This reflects the importance of security of tenure in supporting community sustainability overall.
- The use of fixed-term tenancies is discouraged and normally not allowed in s.106 agreements as it does not meet the Council’s aims to provide long-term secure housing. The Council acknowledges there may be exceptional circumstances where fixed term tenancies could be used, such as making use of grant funding where the provision of a fixed term tenancy allows for the best use of stock or if it supports a local lettings plan or with prior agreement from the Council, where the property can only be let on a short-term basis and would otherwise be left vacant due to a planned re-development in the future or other reasons. If registered providers do offer a fixed term tenancy, there should be clear information, robust review mechanisms, early communication with tenants, and access to independent advice. In addition, the Council would expect:
 - Clear information about the tenancy to be provided to prospective tenants before the start of a tenancy (i.e. when the property is advertised/before the property is allocated)
 - Adhere to the Regulator of Social Housing’s Tenancy Standard regarding fixed term tenancy length and offer a minimum of 5 years tenancy unless in exceptional circumstances
 - A presumption that fixed term tenancies will be renewed if the circumstances of the household are broadly similar to those when the original letting was made.
 - There should be a tenancy review between 6 and 12 months prior to the end of the fixed term which should include (but not limited to) consideration of how the tenant has conducted their tenancy, managed their property, if the property is still suitable to meet the

housing needs of the household and if the tenant has the means to move to alternative accommodation.

- The Council discourages ending a fixed term tenancy if a tenant has improved their employment situation and earned income and seeks to promote improvement in tenant financial circumstances
 - The registered provider will adhere to the Council's pre-eviction protocol at the end of a fixed term tenancy and include the provision of advice to the tenant regarding the appeal process, accessing independent legal advice and how to secure suitable alternative accommodation.
- Work in partnership with Oxford City Council to help meet the housing needs of Oxford residents, including the provision of homes for households in temporary accommodation and those at risk of homelessness, in line with Council duties under the Housing Act 1996 (as amended) and the Homelessness Reduction Act 2017 as well as working with the Council to increase the supply of temporary accommodation.
 - Deliver effective approaches to tenancy sustainment and adhere to the Council's pre-eviction protocol.
 - Support effective tenancy management including addressing anti-social behaviour, domestic abuse, and wider neighbourhood issues by maintaining a meaningful presence in the City and working collaboratively with Council teams, the Police, and other statutory and voluntary services.
 - Treat tenants and prospective tenants with fairness and respect and promote tenant engagement
 - The Council discourages the routine use of short-term or non-secure tenure arrangements.

These expectations apply equally to the Council in its role as a landlord of social housing. In line with Section 150(3) of the Localism Act 2011, the Council will have regard to this Tenancy Strategy when exercising its own housing management functions and the Council publishes a separate Tenancy Policy for all Oxford City Council tenants.

5. Affordable housing

The National Planning Policy Framework (2024) defines **Affordable housing** as "housing for sale or rent, for those whose needs are not met by the market

(including housing that provides a subsidised route to home ownership and/or is for essential local workers); and which complies with one or more of the following definitions:

a) **Social Rent:** meets all of the following conditions: (a) the rent is set in accordance with the Government's rent policy for Social Rent; (b) the landlord is a registered provider; and (c) it includes provisions to remain at an affordable price for future eligible households, or for the subsidy to be recycled for alternative affordable housing provision.

b) **Other affordable housing for rent:** meets all of the following conditions: (a) the rent is set in accordance with the Government's rent policy for Affordable Rent, or is at least 20% below local market rents (including service charges where applicable); (b) the landlord is a registered provider, except where it is included as part of a Build to Rent scheme (in which case the landlord need not be a registered provider); and (c) it includes provisions to remain at an affordable price for future eligible households, or for the subsidy to be recycled for alternative affordable housing provision. For Build to Rent schemes affordable housing for rent is expected to be the normal form of affordable housing provision (and, in this context, is known as Affordable Private Rent).

c) **Discounted market sales housing:** is that sold at a discount of at least 20% below local market value. Eligibility is determined with regard to local incomes and local house prices. Provisions should be in place to ensure housing remains at a discount for future eligible households.

d) **Other affordable routes to home ownership:** is housing provided for sale that provides a route to ownership for those who could not achieve home ownership through the market. It includes shared ownership, relevant equity loans, other low-cost homes for sale (at a price equivalent to at least 20% below local market value) and rent to buy (which includes a period of intermediate rent). Where public grant funding is provided, there should be provisions for the homes to remain at an affordable price for future eligible households, or for any receipts to be recycled for alternative affordable housing provision, or refunded to Government or the relevant authority specified in the funding agreement.

6. Affordability

Oxford is one of the least affordable places to live in the UK, with both house prices and private rents significantly exceeding national averages. This makes it essential that all affordable housing in the City is genuinely affordable to households on low and modest incomes.

The Council expects registered providers to set rents in accordance with the Rent Standard as set out by the Regulator for Social Housing, except where exclusions apply.

Social Rents

The Council expects registered providers to offer all new homes, and re-let homes wherever possible, at Social Rent level and encourages registered providers to set rents in line with social rent benchmarks as the default rental type and to use affordability assessments that reflect the realities of household income, particularly for low-income groups. Rent setting should not push households into hardship or unsustainable financial situations.

Affordable rents

The use of Affordable Rent tenures should be limited to specific scenarios and in such cases, rents, including any applicable services charges, should not exceed the Local Housing Allowance (LHA).

Although the Council does not generally support Affordable Rent as a default tenure in place of Social Rent, it acknowledges that in exceptional circumstances Affordable Rent is appropriate i.e.:

- Affordable Rents may be applied to new homes funded by Homes England (or other grant agencies) where Affordable Rent is expected in order to comply with grant funding requirements. Hence not to offer properties with Affordable Rents could limit the availability of grant funding and the opportunities to build new affordable homes in the area (In this case, the rent should be capped and not exceed Local Housing Allowance (LHA) Rates). Charging above LHA rates will exacerbate financial problems for the household and could result in loss of tenancy due to rent arrears.
- Affordable Rents (with rents capped to not exceed LHA rates) could be acceptable as intermediate tenure i.e. the additional affordable housing units offered over and above the required proportion of social rented tenure homes required through planning policy on suitable development sites (see Oxford Local Plan policies).
- Affordable Rent properties (with rents capped at LHA levels) may be applied to some new-build where there are exceptional viability circumstances on a development site i.e. where site viability has been

tested and this clearly demonstrates that the site cannot deliver the required proportion of social rented tenure but it could be viable with a small element of Affordable Rent tenure as part of the overall affordable housing provision (any proposals would need to meet with current and future Oxford Local Plan Policies).

- Affordable Rent properties (with rents capped at LHA levels) may be applied to some acquisitions where there are exceptional viability circumstances. i.e. where acquisition viability has been tested and this clearly demonstrates that the site cannot be delivered without an element of Affordable Rent tenure

For further guidance on how affordable housing provision is governed through the planning system please refer to Oxford City Council planning policies and government guidance.

The Council does not support rent increases that would result in Affordable Rents rising above LHA rates in future years, as this undermines the principles of affordability and creates barriers to tenancy sustainment. Providers are encouraged to reference current ONS and LHA data when setting rent levels and to consider affordability assessments that reflect local incomes and circumstances.

Shared Ownership

Shared Ownership is one of a range of intermediate housing options. In a city with high housing costs, it is essential that these homes remain genuinely affordable to those they are intended to serve.

Whilst the Council's preference is for affordable housing properties to be let at a social rent, it understands that shared ownership is an alternative option for residents.

The Council wants to ensure that tenants are offered the most affordable rental portion when purchasing a shared ownership property. Due to this, the Council encourages all registered providers when undertaking development scheme appraisals and modelling on a shared ownership unit, to assume the % rent charge on unsold equity is set at 2% and to only go up (to 2.75% max) in increments if this is necessary to ensure that a scheme is viable. This policy will maximise the affordability for prospective owners of shared ownership properties, whilst assessing and ensuring scheme viability for registered providers.

The Council encourages registered providers to recycle capital receipts from the sale of shared ownership units to deliver new affordable housing in Oxford.

The Council advocates for service charges for shared ownership units are kept to an affordable level (See below)

Shared Ownership homes must be affordable relative to the applicant's income, taking into account mortgage repayments, rent, and service charges. Providers should carry out affordability assessments that are robust, transparent, and aligned with the criteria used by Homes England and reputable lenders. The Council does not support Shared Ownership being promoted as a substitute for affordable homes for rent and expects all schemes to demonstrate that they meet genuine housing need.

Shared ownership affordability

The Council advocates for shared properties to be affordable for owners. It is the aspiration of the Council that shared ownership owners do not spend an excessive amount of their net income on rent/mortgage costs, this has been examined and reported on by the Affordable Housing Commission and supported by leading charities such as Shelter and the Joseph Rowntree Foundation.

The availability of mortgages and the cost of mortgage payments will be influenced by a purchaser's available deposit and income, the current mortgage interest rates and the range of mortgage lenders who are able to lend on shared ownership properties (which can be a limited number of lenders in the market). The Council understands that there will need to be flexibility for individual aspiring homeowners to be able to purchase properties and registered providers should support making properties as affordable as possible.

Service Charges

Service charges are governed by separate legislative requirements, including the Landlord and Tenant Act 1985, The Service Charges (Consultation Requirements) (England) Regulations 2003, Service Charges (Summary of Rights and Obligations, and Transitional Provision) (England) Regulations 2007 and relevant provisions within tenancy and leasehold agreements. Under these regulations, tenants and leaseholders must be provided with a summary of their rights and obligations in relation to service charges.

The Council recognises that service charges, when combined with rent—or with mortgage payments in the case of Shared Ownership—can significantly affect the overall affordability of a home, particularly for households on low incomes or

those reliant on Universal Credit or Housing Benefit. In such cases, not all elements of a service charge may be eligible for support under the housing cost element of welfare payments.

Affordable housing providers operating in Oxford are therefore expected to:

- Endeavour to keep service charges to a minimum, in scheme design and operation and ensure any increases are reasonable and clearly justified;
- Clearly distinguish between rent and service charges in tenancy agreements, property adverts, and marketing materials;
- Engage with the Council before introducing new or non-eligible service charges that may increase tenants' financial burden;
- Comply with the Regulatory of Social Housing's Transparency, Influence and Accountability Standard, which requires providers to supply tenants with transparent information including about how service charges are calculated and reviewed.

Oxford City Council encourages all registered providers to monitor the cumulative impact of rents and service charges on affordability, and to ensure compliance with national guidance and good practice in all communications with tenants and prospective buyers.

7. Housing Management, Tenancy Management and Anti-social Behaviour

Tenancy and housing management

Registered providers must maintain tenancy management services that adhere to the Consumer Standards 2024 and respond to diverse tenant needs. This includes effective management of all conditions of the tenancy agreement, including tackling tenancy fraud, managing tenancy changes, mutual exchanges (e.g. Home Swapper Scheme or equivalent) and the Right to Buy process (for Council tenants) and will ensure that social housing tenants act appropriately and in accordance with their tenant responsibilities.

Anti-social Behaviour

The Council realises the impact anti-social behaviour can have on residents and supports taking appropriate action. In line with the Regulator for Social Housing's Neighbourhood and Community Standard, the Council promotes joint working

between local authorities, the police and other relevant organisations to tackle anti-social behaviour and hate incidents across the district.

The Council supports the consideration of available tenancy management powers to address anti-social behaviour, including using demoted tenancies. We would expect actions to be proportionate and to recognise and consider the support needs of the tenant and use the lowest level of intervention suitable for the case.

Tenancy Sustainment

All registered providers should deliver tenancy sustainment services, participate in the Council's pre-eviction protocol, and adhere to the Pre-Action Protocol for Possession Claims. Information about registered providers' tenancy sustainment offer should be promoted on their website with accessible ways for their tenants to contact and access this service.

The Council expects a strong emphasis on early intervention, proactive engagement with tenants in difficulty before crisis point, and close partnership working through the *Tenants at Risk* process and the Council's homelessness prevention services and commissioned services, which supports individuals who are homeless or at risk of homelessness.

Tenant decants

In cases of planned redevelopment or major works where decanting is required, registered providers must adhere to the Council's decant requirements as set out in the Allocation Scheme. Tenants should be involved at the earliest opportunity, provided with clear and accessible information, and supported throughout the rehousing process to minimise disruption and maintain community links.

Tenants of registered providers living in Oxford, who are required to move due to redevelopment, refurbishment, or essential repairs that cannot be completed with them in residence, may be awarded 'decant status' under the Council's Allocation Scheme. This is granted by a senior manager and entitles the household to a priority move. As per the Tenancy Standard, registered providers shall grant tenants who have been moved into alternative accommodation during any redevelopment or other works a tenancy with no less security of tenure on their return to settled accommodation.

Best use of stock

The Council supports the best use of social housing stock in line with the Regulator of Social Housing's Consumer Standards 2024. The Council supports registered provider schemes to incentivise freeing up larger properties for households in need. This includes the Removals and Expenses Move-on (REMS) incentive scheme offered to Council Tenants who are under-occupying their current home and who wish to downsize. This would allow their current home to be offered to a family and be fully occupied.

Successions

Successions to tenancies should be applied in line with legislation and Government guidance applicable at the time of the succession application. Where a person succeeds to a tenancy but needs to move, please refer to the Council's Allocations Scheme for more details.

8. Domestic Abuse and Safe Tenure

The Council is committed to ensuring that survivors of domestic abuse can access safe, secure, and stable housing. In line with the Secure Tenancies (Victims of Domestic Abuse) Act 2018, the Domestic Abuse Act 2021, and the principles of the Domestic Abuse Housing Alliance (DAHA), any secure or assured tenant who is rehoused due to domestic abuse must be offered a tenancy equivalent to the one previously held, in the case of social tenancies.

The Council supports a collaborative approach to promoting trauma informed housing pathways for victims of domestic abuse as per the Neighbourhood and Community Standard which confirms '*Registered providers must work co-operatively with other agencies tackling domestic abuse and enable tenants to access appropriate support and advice.*' (s.1.4.1 Neighbourhood and Community Standard, Consumer Standards 2024). Oxford City Council expects all partners to implement this consistently and monitor allocations to ensure compliance with this statutory duty and best practice.

9. Partnership and Delivery Framework

The Council expects that all registered providers will comply with the Rent standard and other relevant legislation when re-letting housing stock and not convert properties let at social rent levels, unless in exceptional circumstances as defined by the Regulator of Social Housing.

Through the Oxford Register of Affordable Housing (ORAH), the Council and its registered provider partners have agreed shared principles for housing allocations, nominations, and tenancy management. ORAH partners are

expected to provide 90%–100% of all lettings to applicants on the Council's Housing Register. They are also expected to support the operation of the common housing register and ensure that any disposals or tenure conversions of affordable housing stock are subject to the Council's review and approval. Where a property is sold, it should be replaced with a new Social Rent home within Oxford.

Through the ORAH partnership, registered providers cannot convert tenures nor dispose of rented affordable homes without the explicit consent of the Council.

For new developments, registered providers are expected to comply with the tenure mix and affordability expectations set out in Oxford's Local Plan. The Council's Affordable Housing Policies specify that at least 80% of the total affordable housing delivered on-site should be for Social Rent, with the remaining 20% delivered as intermediate housing.

While Affordable Rent may form part of that intermediate tenure mix, Affordable Rent at 80% of market rent is not considered genuinely affordable for most households on low to median incomes in Oxford. The Council therefore expects that Affordable Rent is used only where justified, and in a way that meets local affordability benchmarks or as stated within the Affordable Rent section of this document.

The Council recognises that in some constrained or complex development sites, a degree of flexibility may be required to maximise delivery. In such cases, any proposed variation to tenure mix or rent levels must be agreed with Oxford City Council on a case-by-case basis, subject to the planning process.

Build to rent

The Council strongly encourages new build stock to be held by registered providers of social housing and to consider the agreement of nomination rights for households that are most in need within the district. If a build to rent scheme is approved by the Local Planning Authority that are not held by registered providers of social housing, rents should be set at an affordable rent according to s.106 agreements. In line with government guidance, the build to rent operator should work with local authorities taking into account households from the Council's housing list where there are eligible households to support the Council's homelessness duties. Rents should be set at an affordable rent in perpetuity and should not be re-let at a non-affordable rent.

10. Monitoring and Review

The Council will monitor delivery of the Tenancy Strategy to ensure it delivers the objectives and outcomes for local residents.

Formal monitoring will be conducted through a yearly report to the Council's Corporate Leadership Team (CLT) and then shared for consideration and input from the Council's scrutiny committee and relevant tenant and leaseholder board.

Alongside formal monitoring, the Council will keep the contents under review and will update with any minor changes to take account of:

- Updates to the Council's relevant housing policies and strategies
- Legislations or regulations to which it must follow
- Good practice developments

The Council will hold regular partnership meetings with registered providers and relevant agencies within the City to prioritise the objectives within the strategy, including ORAH partnership meetings regarding lettings and nominations, new housing supply and housing management within neighbourhoods.

Tenancy policies of all registered providers should be published online and made available to the Council on request.

Appendix A: Tenancy Types and Oxford City Council Expectations

| Tenancy Type | Description | OCC Position |
|---------------------------------|-------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|
| Introductory/Starter Tenancy | 12-month probationary tenancy for new tenants. | Supported as standard for all new tenants. Converts to lifetime if no serious breaches. |
| Secure (Lifetime) Tenancy | Permanent tenancy with strong legal protection for Local Authority tenants | Default and preferred tenancy type for general needs tenants. |
| Assured Tenancy | Permanent tenancy with strong legal protection for registered providers tenants (non-Local authority) | Default and preferred tenancy type for general needs tenants. |
| Assured Shorthold Tenancy (AST) | Used in private sector leasing or temporary accommodation. | Used only for private sector leasing where legal framework requires it. |
| Fixed-Term/flexible Tenancy* | Granted for a specific period | Discouraged except in exceptional cases such as adapted homes, short-term regeneration sites, or rent-to-buy schemes. |
| Demoted Tenancy | One-year tenancy with fewer rights following serious ASB or other tenancy breach. | May be used as a last resort in response to verified serious anti-social behaviour. |
| Non-Secure Tenancy | Used by Local Authorities, typically in temporary accommodation or decant situations. | Used only where appropriate, for temporary short-term lets or decanting. |

*Examples of acceptable use for fixed-term tenancies include adapted homes with a specific mobility need, accommodation tied to employment, rent-to-buy schemes, or properties due for redevelopment. These must be clearly justified and subject to early and transparent review.

Reference List

Legislation and Guidance Referenced in the Strategy

Social Housing (Regulation) Act 2023: [Social Housing \(Regulation\) Act 2023](#)

Localism Act 2011: [Localism Act 2011](#)

Consumer Standards 2024: [Annex 3: Consumer standards 1 April 2024 - GOV.UK](#)

Equality Act 2010: [Equality Act 2010](#)

Domestic Abuse Act: [Domestic Abuse Act 2021](#)

Domestic Abuse Housing Alliance: [DAHA - Domestic Abuse Housing Alliance](#)

National Planning Policy Framework: [National Planning Policy Framework](#)

Oxford Population Statistics: [Oxford's population statistics | Oxford City Council](#)

Oxford City Council Strategies and Policies Referenced

Oxford City Council Strategy: [Introduction - Our Strategy | Our Strategy 2024-28 | Oxford City Council](#)

Housing, Homeless and Rough Sleeping Strategy: [Introduction | Housing, Homelessness and Rough Sleeping Strategy 2023 to 2028 | Oxford City Council](#)

Allocations Scheme: [Housing Register Allocations Scheme - summary version | Oxford City Council](#)

Choice-Based Lettings: [Choice Based Lettings | Oxford City Council](#)

Domestic Abuse: [Domestic Abuse Policy for Service Users | Oxford City Council](#)

ASB Policy: [Download the Anti-Social Behaviour Policy and Procedure | Oxford City Council](#)

Oxford City Council Tenancy: [Your tenancy agreement | Oxford City Council](#)

Incentive Scheme for tenants: [Incentive scheme for council tenants to move into a smaller home | Oxford City Council](#)

Tenant Satisfaction Measures: [Tenant Satisfaction Measures - April 2024 to March 2025 | Our performance as a landlord | Oxford City Council](#)

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Oxford City Council – Tenancy Policy

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1. Introduction

Oxford City Council (“the Council”) is a social housing landlord and the Tenancy Policy sets out how it will operate and deliver the requirements of the Council’s overarching Tenancy Strategy (which sets expectations for all registered providers) including how we let homes, the types of tenancies we offer, and how we help tenants to maintain their homes successfully.

The Council manages around 8,100 homes with other registered providers in Oxford managing around a further 4,100 homes. The Council works with registered provider partners via the Oxford Register of Affordable Housing (ORAH) Partnership Agreement to increase the supply of social housing in Oxford. Around 90% of available homes from partner landlords are allocated to households on the Council’s Housing Register.

The Tenancy Policy puts into action the priorities outlined in the Social Housing (Regulations) Act and Consumer Standards introduced by the Regulator of Social Housing (including the Tenancy Standard) as well as the Council’s strategy objectives to provide *good affordable homes* and *thriving communities*.

This document updates and replaces Oxford City Council’s Tenancy Policy 2018-23 and has been informed by key Council housing policies including the Tenancy Strategy, Housing, Homelessness & Rough Sleeping Strategy 2023-2028, Housing Allocations Scheme, Oxford City Council Strategy 2024-2028 and is also complimented by and supports a range of Council policies including the Council’s Domestic Abuse Policy for Service Users and Anti-Social Behaviour Policy.

The policy should be read alongside your Tenancy Agreement (which sets out your legal rights and responsibilities)

If you require any further information, please contact your allocated Housing Officer or the Housing Services Team who will be happy to assist you.

2. Allocations and Lettings

All available council homes are allocated in accordance with the Council’s Allocations Scheme, which sets out who qualifies for housing, how priority is assessed, and how homes are offered.

The Council works closely with the Oxford Register of Affordable Housing (ORAH) partners to maximise access to social housing. The Council is committed to making best use of its stock while meeting urgent housing need, supporting the prevention of homelessness and meeting our aim to create *great homes for all* in line with the Council’s Housing, Homelessness and Rough Sleeping Strategy 2023-2028.

Most properties are advertised through the Council’s Choice-Based Lettings (CBL) system, where applicants can bid for the homes, they are eligible for. The Allocations Scheme also allows for direct offers in certain circumstances, such as when a person is at risk of serious harm, or where there are urgent health or safeguarding needs.

Some groups are not required to have a local connection to Oxford in order to be accepted onto the affordable housing register. This includes people fleeing domestic abuse, care leavers under 25, and members or former members of the armed forces.

The allocation scheme also provides additional support to applicants with complex housing needs or who are moving on from supported housing. For full details including exact local connection criteria, residents can refer to the Allocations Scheme available on the Council's website.

The Council is committed to ensuring fair and inclusive access to its allocations of housing. We recognise that tenants and applicants may face different barriers based on protected characteristics as defined by the Equality Act 2010. We aim to promote inclusive practices that are sensitive to individual and diverse needs.

3. Types of Tenancy

The Council supports the use of Introductory and Secure Lifetime tenancies ("Secure Tenancy") as the default tenure types. These provide long-term stability and support the Council's ambition to reduce housing insecurity and promote inclusivity.

The Council uses a 12-month Introductory Tenancy for new Council tenants as a trial period, which automatically converts to a Secure Tenancy if the tenant complies with the terms of the agreement.

Introductory Tenancies

When you become a tenant with the Council you will be given an introductory tenancy if:

- you have never rented a home from us before
- you have only rented from a private landlord
- you have had a period away from being a tenant of a council or a housing association

This will normally last for a year. You will usually be given a secure lifetime tenancy at the end of the year as long as you have not broken your introductory tenancy agreement.

With an introductory tenancy some of your rights are limited:

- you cannot apply to buy your home
- you cannot exchange homes with another tenant
- you cannot sub-let your home
- the Council can bring your tenancy to an end more easily

With Introductory Tenancies, they allow new tenants to demonstrate they can successfully manage their tenancy obligations and there is an expectation that

tenants will receive adequate support to conduct their tenancy successfully. This is reviewed at regular intervals and will consider how the tenancy has conducted your tenancy and managed your property. Extensions to the introductory period may be made in line with legal provisions. If in the circumstance tenancy action is to be taken, clear information and communication will be given.

Secure Tenancies

Most tenants who have had their tenancy for at least one year will have a secure tenancy. With a secure tenancy you have more rights:

- you can stay in your home for as long as you want provided you do not breach the tenancy agreement
- you cannot be made to leave your home except by a court order
- when you die, your tenancy can normally be taken over by a spouse or partner, or another family member who has been living in the property with you before your death (depending on the date your tenancy started and how long your family member has lived in the property). Further details can be found in the succession section further down this document.
- you can buy your home under the Right to Buy legislation if you meet the relevant criteria (with certain exceptions for specialist housing)

The Council may use other tenancy types in specific circumstances, including:

- Non-secure tenancies for temporary accommodation;
- Licence agreements for supported housing or emergency placements;
- Demoted tenancies following court action related to anti-social behaviour or other related tenancy breaches.

Fixed Term Tenancies

The Council supports the use of secure tenancies and does not generally support the use of Fixed-Term Tenancies (FTTs). In line with the Council's Tenancy Strategy FTTs will only be considered in exceptional circumstances and only after review and approval by the Director of Housing Services. FTTs will normally be for a minimum of 5 years and only less in exceptional circumstances. Occasions where FTTs may be used, including FTTs under 5 years, include when:

- The Council is prohibited from issuing a longer tenancy due to grant funding restrictions on the property
- The property can only be let on a short-term basis and would otherwise be left vacant due to a planned re-development in the future or other reasons.

Full details on the Council's procedure on FTTs is available on the website including:

- *The circumstances in which the Council may or may not grant another tenancy on the expiry of the fixed term, in the same property or in a different property, and the detail of the process on how FTTs are reviewed*
- *How a tenant or prospective tenant may appeal against a decision on a review of a fixed term tenancy*
- *The Councils approach on taking into account the needs of those households who are vulnerable by reason of age, disability or illness, and households with children, including through the provision of tenancies which provide a reasonable degree of stability.*
- *Advice and assistance available for tenants on finding alternative accommodation in the event there is a decision not to grant another tenancy.*
- *The policy on granting discretionary succession rights, taking account of the needs of vulnerable household members.*

If you have questions about your tenancy, please contact your Housing Officer or the Housing Services team for advice.

4. Rent and Affordability

Oxford is one of the most expensive places to live in the UK, and we know that rent affordability is a major concern for tenants. The Council is committed to making our homes genuinely affordable for people on low and modest incomes.

Oxford City Council homes preferred level is set at Social Rent levels for general needs housing, which are lower than market rents. If the Council is required to offer an Affordable Rent (for example, due to external funding conditions or viability for new build properties) the Council will ensure that the rent does not exceed the Local Housing Allowance for Oxford. Other rental types such as Council managed temporary accommodation rents are set based on other regulations. The Council reviews rent levels to help make sure housing costs are fair and manageable for our tenants.

5. Tenancy Management

The Council aims to provide proactive, preventative and compassionate tenancy management service with a focus on supporting vulnerable tenants with diverse needs.

Tenants can expect timely responses to queries, requests for tenancy changes, and support to resolve disputes or difficulties.

The Council also undertakes regular tenancy audits to identify and address issues such as:

- Tenancy fraud;
- Overcrowding or under occupation;
- Anti-social behaviour;

- Support needs or safeguarding concerns.

The Council understands that Anti-Social Behaviour (ASB) has a profound effect on tenants and the Council's anti-social behaviour policy has five key principles:

- Principle One: No one should have to suffer from ASB.
- Principle Two: Reports of ASB will be treated seriously and dealt with professionally.
- Principle Three: ASB will be addressed firmly, fairly and proportionately.
- Principle Four: We will work with partners in order to deliver an effective ASB service for our communities.
- Principle Five: We will deliver high quality customer service.

The Council will work collaboratively with tenants, the Police, and other statutory and voluntary services to tackle anti-social behaviour. Please contact the Anti-Social Behaviour team if you want to make any reports or find out more regarding how the council is tackling anti-social behaviour.

6. Preventing Eviction and Tenancy Sustainment

We want every Oxford City Council tenant to succeed in their home. If you're struggling to manage your tenancy or falling behind with rent, we will work with you to offer early help and support.

Advice and signposting is provided on the Council's website for support with benefits, income maximisation and finding work alongside links to health and social care provision.

For tenants who require more support, our Tenancy Sustainment Team is here to help Council tenants who are finding it difficult to manage their tenancy. We offer advice on managing money, claiming benefits, and getting support from specialist services. We also work closely with the Council's homelessness prevention teams and partner organisations through the pre-eviction protocol to prevent evictions where possible.

We aim to resolve issues as early as possible and will always treat you fairly, respectfully, and without judgment. Eviction is always a last resort and will only be considered where all other support options have been exhausted and in line with legal procedures.

The Council also works with a number of advice centres in the City to ensure tenants can access impartial advice, with more information on our website - [Oxford City Council Homepage – Oxford City Council](#)

7. Tenancy succession, assignment, exchange and transfer

Assignment, Succession and Exchange can only take place under the limited circumstances permitted by the Housing Act 1985 (as amended by the Localism Act 2011) and (in the case of Mutual Exchange) with the Council's written permission which we can only withhold in certain specified circumstances.

- Assignment - a tenant passes on the tenancy to an eligible person before they die.
- Succession - when a tenant dies their tenancy can be passed to an eligible person.
- Mutual exchange - when tenants swap the tenancies of their homes.

Assignment

If you are a secure tenant you have the right to assign your tenancy to another person in the following circumstances, in all cases a deed of assignment is required;

- You may exchange your property with another secure or assured tenant. You must obtain our written permission before the exchange takes place.
- You can assign your tenancy to someone who would be eligible to succeed to your tenancy on your death. You can only do this if there have been no other successions to this tenancy.

Succession

The Localism Act 2011 changed the law relating to succession rules. That part of the Act came into law in April 2012 and it enabled landlords to set out the changes in their Tenancy Agreements. The first update to the Oxford City Council Tenancy Agreements after that date was on 15th September 2014

If you became a tenant before 15th September 2014 and providing there has been no previous succession, when you die your tenancy will pass to your husband, wife or civil partner if they are living with you at the time of your death. If you do not have a husband, wife or civil partner when you die, your tenancy can pass on to another member of your family who has been living with you for at least 12 months before your death. Family members include your partner, parent, grandparent, child, grandchild, brother, sister, uncle, aunt, nephew or niece but does not include foster children.

If you became a tenant after 15th September 2014, your tenancy can only pass to your husband, wife, civil partner, or a person who lives with you as if they were a husband, wife or civil partner if they were living with you at your home at the time of your death.

That person must occupy the property as their only or principal home at the time of the tenant's death.

If you have a joint tenancy and one of you dies, the tenancy will pass to the other joint tenant and this will count as a statutory succession.

If your tenancy passed to you when the previous tenant died, no one else has the right to succeed or take over your tenancy.

In some special circumstances the Council may grant a surviving member of the household a new tenancy under the terms of our allocations policy.

That person must be;

- Living in the property as their only or principal home when the person dies,
- The tenant's wife or husband or civil partner, or
- The tenant's partner who has lived with the tenant for at least 12 months immediately before the tenant died, or
- A member of the tenant's close family who has lived with the tenant for 12 months immediately before the tenant died.

If the property does not match the housing needs of the person granted a new tenancy, we have a right to move them to another property. For example, the home may be too large or have special adaptations.

If someone living in the property does not qualify to succeed to a tenancy, a referral will be made to the Council's Housing Needs team to offer support to find appropriate housing in line with the Council's homelessness duties.

Mutual Exchange

The Council supports secure tenants who wish to swap homes with another council or housing association tenant. This process, known as a mutual exchange, can help tenants move to different areas, find more suitable accommodation, or be closer to family, work, or support networks.

Oxford City Council tenants can find a swap through a variety of methods including national platforms such as HomeSwapper. The Council and most registered social landlords operating in Oxfordshire have joined HomeSwapper. This is a national scheme for exchanges between tenants across the country. This service is free to Oxford City Council tenants and also tenants of housing associations that have joined the scheme

Tenants considering a swap must have a secure tenancy and no serious breaches of their tenancy agreement. Exchanges are subject to approval and must meet legal and policy criteria.

We cannot refuse permission to exchange unless there is a good reason including if you have broken the terms of your tenancy agreement, further information can be found in your tenancy agreement including conditions you must meet.

Transfer

You may apply to move to another property suitable to your needs owned by the Council or another social landlord by application to the Housing Transfer Register.

Change of tenant by Court Order

A court can make an order for the transfer of a tenancy in special circumstances. We recommend that you seek independent legal advice in the event of a relationship breakdown or other tenancy dispute.

If you have questions about your tenancy, please contact your housing officer or the Housing Services team for advice.

8. Decant

When homes must be vacated for redevelopment, regeneration, or major repairs the Council aims to ensure that tenants are consulted, supported, and kept informed. The Council offers priority to move via the Council's Allocation Scheme.

Tenants affected by a decant will be offered suitable alternative accommodation, assistance with removal and resettlement, and, wherever possible, the opportunity to return. Security of tenure will be preserved throughout by offering the same or similar tenancy terms (this could include an offer of an Assured Tenancy with a registered provider).

Emergency decants relating to disrepair, for example due to fire or structural issues or damp and mould in accordance with Awaabs Law and the Council's Damp and Mould policy, requiring an urgent move may be arranged outside of the Allocations Scheme by the Council via a management move in line with statutory requirements.

9. Ending your tenancy

If you want to end your tenancy, you must write to give us notice. You must do this at least four weeks before you want to leave your property. This four weeks' notice must start on a Monday and end on a Sunday or as prescribed in your tenancy agreement.

Only a named tenant can end the tenancy but if you are joint tenants, either of you can end the tenancy on behalf of both tenants. This will end the tenancy and if the other joint tenant(s) wants to stay we will decide whether to offer the remaining person a tenancy of the property. Please note the Council will still hold the departing tenant individually responsible for any arrears of rent and recharges created up to the date the notice ends.

We may allow you to hand back the property before the end of the notice period and not charge you the rent for the remaining period. The property must be completely clear of any belongings and furnishings, including the garden and external buildings and no persons must remain in the property.

In accordance with the Council's allocation scheme, when one party within a joint tenancy gives notice, a new sole tenancy may be granted to the other party at the discretion of the Council. Please note the circumstances below where this will be considered as stated within the Council's allocation scheme:

Joint To Sole and Sole to Joint Tenancies

Joint to Sole On receipt of written notice (normally 4 weeks' notice) that one party wishes to end the tenancy, a new sole tenancy for the same property may be granted at the discretion of the Tenancy Management Manager. This will only be considered where the property remains suitable to the needs of the tenant.

Sole to Joint On written notice by the sole tenant, a new, joint, tenancy for the same property may be granted at the discretion of the Tenancy Management Manager. This will only be considered where the property remains suitable to the needs of the tenants and there has been no previous succession to the tenancy. We strongly

advise that any person considering giving notice should contact their Housing Officer in the first instance or seek independent legal advice.

10. Domestic Abuse and Safe Tenure

The Council recognises domestic abuse as a serious safeguarding and housing issue and is committed to providing a safe, supportive and survivor-led response.

The Council's approach is guided by the Domestic Abuse Act 2021, the Secure Tenancies (Victims of Domestic Abuse) Act 2018, and the principles of the Domestic Abuse Housing Alliance (DAHA) which the Council is a member of. This commitment is set out in full in the Council's Domestic Abuse Policy for Service Users.

The Council adopts a survivor-led approach. This means that tenants who disclose domestic abuse are listened to, believed, and supported to make informed choices about their housing and safety. The Council aims to provide a consistent, trauma-informed service that enables survivors and their children to feel safe and supported whether they remain in their current home or need to move.

Where a move is necessary, the Council guarantees that survivors who held a lifetime tenancy will be offered a new secure tenancy in line with legislative entitlements, so that they do not lose housing security because of abuse. The Council will also support applicants fleeing domestic abuse to access appropriate accommodation under its allocations and homelessness duties.

The Council consults with partners when safety planning and participates in the MARAC (Multi-Agency Risk Assessment Conference), MATAC (Multi-Agency Tasking and Coordination) and Drive Programme processes, as well as local and regional Domestic Abuse forums.

Council housing staff and designated officers receive training to help them recognise the signs of domestic abuse, respond sensitively to disclosures, and take appropriate action. This may include making safeguarding referrals or connecting tenants with specialist domestic abuse services.

The Council is also developing a network of Domestic Abuse Champions and maintains specialist leads to support a consistent, survivor-led approach across its housing services

The Council also acknowledges that survivors may be from any background and may face additional barriers to accessing help. The Council is committed to ensuring an inclusive response to all groups, including those who have a protected characteristic as defined by the Equality Act 2021.

All disclosures of domestic abuse are treated as confidential in line with the Council's Data Protection Policy, unless there is a legal duty to share information to prevent harm or protect children or vulnerable adults or elsewhere required by law.

Tenants experiencing domestic abuse can contact their Housing Officer via the Council's Customer Service team or call the Oxfordshire Domestic Abuse

Service (ODAS) via 0800 111 2222 (10am - 7pm, Monday to Friday) for immediate help and housing support or the National Domestic Violence Helpline 0808 200 0247 (24 hours a day, 7 days a week)

11. Downsizing and Transfer Support

The Council supports tenants who wish to move to a more suitable home - whether they are under-occupying, overcrowded, experiencing health or personal difficulties, or affected by changes to their circumstances.

If you're living in a home that no longer meets your needs, you can apply for a transfer through the Council's Allocations Scheme. Transfer applications are assessed in the same way as new applications and prioritised based on your level of housing need, using the Council's banding system.

Tenants may be eligible for a transfer in a range of situations, including:

- Requiring fewer or more bedrooms;
- Needing to move due to medical or care needs;
- Being at risk of domestic abuse or serious anti-social behaviour;
- Needing to move because of redevelopment or major works to their current home.

To make best use of available homes, the Council also operates a dedicated incentive scheme for tenants who are under-occupying and want to downsize to smaller accommodation. The scheme offers:

- A financial payment based on the number of bedrooms released;
- Practical support with removals, resettlement, and applying for suitable properties.

This helps reduce housing costs for tenants while making larger family homes available to others in need.

You can find full details of the scheme, including eligibility and how to apply, on the Council's website.

If you're considering a transfer or downsizing, our housing officers are here to provide advice, discuss your options, and guide you through every stage of the move. This work reflects Oxford City Council's wider commitment to making best use of its housing stock and supporting tenants to live in homes that are right for them.

12. Resident Involvement

The Council is committed to ensuring that tenants have meaningful opportunities to influence the services that affect their homes, neighbourhoods, and communities. This commitment is underpinned by the Regulator of Social Housing's Transparency, Influence and Accountability Standard, which sets out clear expectations for how

social landlords must engage with residents. These national standards apply to all social landlords, setting out clear expectations for how residents must be treated, involved, and supported.

The Resident Involvement Strategy 2025-28 will set out how we will meet the requirements of the Consumer Standards and ensure residents have a strong voice in shaping housing services.

The strategy recognises the changing landscape and need for stepping up efforts to improve resident engagement ensuring that residents voice forms part of service delivery and that meaningful engagement platforms and support are in place. This approach will enable residents to have better opportunities to influence, help shape and scrutinise the quality and delivery of services they receive.

If you would like to find our further information about resident involvement or participate in influencing Council policies, please contact the Resident Involvement team.

13. Monitoring and Review

The Council will monitor delivery of the Tenancy Strategy to ensure it delivers the objectives and outcomes for local residents.

Formal monitoring will be conducted through a yearly report to the Council's Corporate Leadership Team (CLT) and then shared for consideration and input from the Council's scrutiny committee and relevant tenant and leaseholder board.

Alongside formal monitoring, the Council will keep the contents under review and will update with any minor changes to take account of:

- Updates to the Council's relevant housing policies and strategies
- Legislations or regulations to which it must follow
- Good practice developments

The Council will hold regular partnership meetings with registered providers and relevant agencies within the City to prioritise the objectives within the policy, including ORAH partnership meetings regarding lettings and nominations, new housing supply and housing management within neighbourhoods.

Glossary of Terms

Introductory Tenancy

A 12-month probationary tenancy given to new tenants. It can become a secure tenancy if no serious breaches occur.

Secure Tenancy

A lifetime tenancy that offers long-term housing security and more legal rights.

Mutual Exchange

A home swap between two social housing tenants, with permission from both landlords.

Succession

When a tenancy is passed on to a family member or partner after the tenant dies.

Demoted Tenancy

A one-year tenancy with fewer rights, used when a tenant has seriously breached their agreement (e.g. due to anti-social behaviour).

Social Rent

A rent level set by government guidelines, generally much lower than private rents.

Affordable Rent

A rent level that is higher than social rent, the council advocates if it is used, this must be below local market rents and capped at Local Housing Allowance levels.

Decant

When tenants are temporarily or permanently moved to another home due to major works, redevelopment or other reasons.

Pre-Eviction Protocol

A local agreement on how to support tenants and prevent evictions through early help and partnership working.

Tenant Satisfaction Measures (TSMs)

Tenant Satisfaction Measures are collected by social landlords and are intended to be a tool to allow tenants to scrutinise their landlord's performance and give insights to landlords on where they might look to improve their services

Succession

When a tenancy is passed on to a family member or partner after the tenant dies.

Registered providers of social housing

Organisations that have been officially recognised by the Regulator of Social Housing (RSH) to provide social housing in England.

Anti-social Behaviour

Behaviour by a person which causes or is likely to cause harassment, alarm or distress to one or more persons not of the same household as the person

Reference List

Legislation and Guidance Referenced in the Strategy

Social Housing (Regulation) Act 2023: [Social Housing \(Regulation\) Act 2023](#)

Localism Act 2011: [Localism Act 2011](#)

Consumer Standards 2024: [Annex 3: Consumer standards 1 April 2024 - GOV.UK](#)

Equality Act 2010: [Equality Act 2010](#)

Domestic Abuse Act: [Domestic Abuse Act 2021](#)

Domestic Abuse Housing Alliance: [DAHA - Domestic Abuse Housing Alliance](#)

National Planning Policy Framework: [National Planning Policy Framework](#)

Oxford City Council Strategies and Policies Referenced

Oxford City Council Strategy: [Introduction - Our Strategy | Our Strategy 2024-28 | Oxford City Council](#)

Housing, Homeless and Rough Sleeping Strategy: [Introduction | Housing, Homelessness and Rough Sleeping Strategy 2023 to 2028 | Oxford City Council](#)

Allocations Scheme: [Housing Register Allocations Scheme - summary version | Oxford City Council](#)

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Domestic Abuse: [Domestic Abuse Policy for Service Users | Oxford City Council](#)

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Oxford City Council Tenancy: [Your tenancy agreement | Oxford City Council](#)

Incentive Scheme for tenants: [Incentive scheme for council tenants to move into a smaller home | Oxford City Council](#)

Resident Involvement Team: [About Resident Involvement | Oxford City Council](#)

Tenant Satisfaction Measures: [Tenant Satisfaction Measures - April 2024 to March 2025 | Our performance as a landlord | Oxford City Council](#)

Mutual Exchange information: [Exchange your council home | Oxford City Council](#)

Why do an Equalities Impact Assessment (EqIA)?

1. Equalities Impact Assessment (EqIA) is part of Oxford City Council's **Public Sector Equality Duty (PSED) (Equality Act 2010)**.

The General PSED enables Oxford City Council to:

- a. **identify and remove discrimination,**
 - b. **identify ways to advance equality of opportunity,**
 - c. **foster good relations.**
2. **An EqIA must be done before making any decision(s)** that may have an impact on people and/or services that people use and depend on.
 3. An **EqIA form is one of many tools** that can simplify and structure your equalities assessment.
 4. We are passionate about equalities, and we highly recommend that **Corporate Management Team (CMT) reports and all projects must attach an EqIA.**

A good EqIA has the following attributes:

1. **Comprehensively considers the 9 protected characteristics.**

| | |
|---------------------------------|------------------------------------------------------------------------------------------------|
| 1. Age | 6. Race & Ethnicity |
| 2. Disability | 7. Religion or Belief |
| 3. Gender Reassignment | 8. Sex |
| 4. Marriage & Civil Partnership | 9. Sexual Orientation |
| 5. Pregnancy & Maternity | NEW- Socio-economic inequalities (voluntary adoption) |
| | NEW- Sanctuary seeking status leading to intersecting inequalities (voluntary adoption) |

2. It has **considered equality of treatment** towards service users, residents, employees, partners, council suppliers & contractors, and Council Members
3. Sufficiently considered **potential and real impact** of proposal or policy on service users, residents, employees, partners, council suppliers & contractors, and Council Members.
4. **Systematically recorded and reported** any potential and real impact of your proposal or policy on service users, residents, employees, partners, council suppliers & contractors, and Council Members
5. **Collected, recorded, & reported sufficient information and data** on how your policy or proposal will have an impact.
6. Offers **mitigations or adjustments** if a PSED has been impacted.

7. Provides clear **justifications** for your decisions.
8. It is written in **plain English** with simple short sentence structures.

Section 1: General overview of the activity under consideration

| | | | | | | |
|-----|--------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|---|-----|-------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| 1. | Name of activity being assessed. | Updated Tenancy Strategy and Tenancy Policy | | 2. | The implementation date of the activity under consideration: | 10 December 2025 |
| 3. | Directorate/Department(s): | City and Citizens Service | | 4. | Service Area(s): | Housing Services |
| 5. | Who is (are) the assessment lead(s): | Stephen Cohen, Refugee and Resettlement Manager scohen@oxford.gov.uk | | 6. | Contact details, in case there are queries: | Stephen Cohen, Refugee and Resettlement Manager scohen@oxford.gov.uk |
| 7. | Is this a new or ongoing EqlA? | New | X | 8. | If this is an extension of a previous EqlA, please indicate where the previous EqlA is located and share the link to the said EqlA. | |
| 9. | Date this EqlA started: | 22 October 2025 | | | | |
| 10. | Will this EqlA be attached to Corporate Management Team (CMT) reports/updates, which will be published online? | Director of Housing | | 11. | Give a date (tentative or otherwise) when this assessment will be taken to the CMT. | n/a |

Section 2: About the activity, change, or policy that is being assessed.

| | | | | | |
|-----|------------------------------------|--------------------------|------------------------------------------|----------------------------------------|--------------------------|
| 12. | Type of activity being considered: | <input type="checkbox"/> | <input type="checkbox"/> Decommissioning | <input type="checkbox"/> Commissioning | <input type="checkbox"/> |
|-----|------------------------------------|--------------------------|------------------------------------------|----------------------------------------|--------------------------|

| | | | | | | |
|-----|-------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------|------------------------------------------------------------------|-------------------------------------------------------------------------------------|-------------------------------------------|
| | | | | | | |
| | | <input checked="" type="checkbox"/> Others. Please specify: Update Strategy and Policy | | | | |
| | | <input type="checkbox"/> | | | | |
| 13. | Which priority area(s) <u>within Oxford City Council's Corporate strategy (2024-2028)</u> does this activity fulfil? | <input checked="" type="checkbox"/> Good, affordable homes | <input type="checkbox"/> Strong, fair economy | <input checked="" type="checkbox"/> Thriving Communities | <input type="checkbox"/> Zero Carbon Oxford | <input type="checkbox"/> Well run council |
| 14. | Which priority area(s) within <u>Oxford City Council's Equality, Diversity & Inclusion Strategy (2022)</u> does this activity fulfil? | <input checked="" type="checkbox"/> Responsive services and customer care. | <input type="checkbox"/> Diverse and engaged workforce. | <input type="checkbox"/> Leadership & organisational commitment. | <input checked="" type="checkbox"/> Understanding and working with our communities. | |
| 15. | Outline the aims, objectives, & priorities of the activity being considered. | <p>The Tenancy Strategy is for Registered Providers to have regard to and sets out the Council's expectations in this area to be taken into account. It must be published and prepared by the local housing authority (Localism Act 2011, s.150(1))</p> <p>The Tenancy Policy is for OCC tenants/future tenants applying for housing and sets the Council policy as a social landlord in this area for new and existing tenants, in alignment with the tenancy strategy.</p> <p>A local housing authority must keep its tenancy strategy under review, and may modify or replace it from time to time. (Localism Act 2011, s.150 (5) The Council's Tenancy Strategy (2018-2023) is required to be updated in line with updated legislation and regulations.</p> | | | | |

| | |
|-------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 16. Please outline the consequences of not implementing this activity. | <p>The consequence of not implementing the updated Tenancy Strategy and Tenancy Policy is that the Council would be at risk of being non-compliant with legislative requirements under key legislation such as the Social Housing Regulations Act and Consumer Standards. An up to date Tenancy Strategy is essential to be able to confirm expectations of registered providers who play a vital role within Oxford of developing, letting and managing social housing properties.</p> |
|-------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

Section 3: Understanding service users, residents, staff and any other impacted parties.

| | |
|-----------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 17. Have you undertaken any consultations in the form of surveys, interviews, and/or focus groups? | <p>The Council ran a public consultation from Monday 29 September 2025 to Sunday 26 October 2025 which included the draft Tenancy Strategy and Tenancy Policy alongside a set of questions which focused on gaining insight into the views of registered providers and residents key areas of the strategy including security of tenure, rental type, homelessness, tenancy sustainment, neighbourhoods and communities.</p> <p>To increase engagement the Council created an online public consultation portal and offered hard copies of the consultation questions to be collected from Oxford Town Hall. Officers wrote directly to all registered providers of social housing in Oxford who are part of the Oxford Register for Affordable Housing (ORAH) partnership.</p> <p>The Council's communication team supported resident engagement by issuing a press release which can be found here and featured in local media outlets article publications. The Council promoted to Oxford city Council tenants in the 'tenant in touch' newsletter and engaged Oxford City Councillors through the regular members newsletter. Officers also promoted the consultation on the Council's housing register online portal where residents who are on the housing register can bid for new social housing properties in Oxford.</p> <p>Officers also engaged Oxford City Council tenants working in partnership with the Council's Resident Involvement Team to organise 2 focus groups online. Officers presented a summary of the draft documents and took questions and received feedback. As a result of the tenant feedback the Council amended the consultation questions to make a section clearer. Officers have also amended the final documents to include clear reference points as a result of tenant feedback</p> |
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| <p>18. List information and data used to understand who your residents or staff are and how they will be impacted.</p> | <p>As part of the development of the strategy Officers have utilised a number of data sources including existing Council strategies such as the existing Tenancy Strategy and Tenancy Policy, Housing, Homelessness and Rough Sleeping Strategy 2023-2028 and the Allocations Scheme alongside key legislation including (but not limited to) the Localism Act 2011, Housing Act 1996 (as amended) incorporating the Homelessness Reduction Act 2017.</p> <p>Other data sources including statutory homelessness statistics, internal data bases, Census data, data from the Office for National Statistics, research and national policies to compile and then analyse the information.</p> <p>A consultation has also been completed to engage with Registered Providers of Social Housing, Tenants and other Residents on the proposed Tenancy Strategy and Policy.</p> <p>The Council ran a public consultation from Monday 29 September 2025 to Sunday 26 October 2025 which included the draft Tenancy Strategy and Tenancy Policy alongside a set of questions which focused on gaining insight into the views of registered providers and residents in key areas of the strategy including security of tenure, rental type, tenancy sustainment, etc..</p> <p>Officers wrote to all registered providers of social housing in Oxford who are participating in the Oxford Register for Affordable Housing (ORAH) partnership. The Council promoted the consultation to all city residents via social media and local press, and specifically to Council tenants in the 'tenants in touch' newsletter and engaged Oxford City Councillors through the regular members newsletter. Officers also promoted the consultation to housing applicants on the Oxford Register for Affordable Housing via the Council's Choice-Based Lettings website used to advertise and let social housing to new and existing tenants.</p> <p>Officers also engaged directly with Council tenants through two on-line focus group sessions. Through this process a summary of the proposed changes were presented and the tenants were given the opportunity to discuss the proposals, raise any queries and suggest any changes or improvements. Tenants in this process were broadly supportive of the Council's proposed approach, including on the issuing of lifetime secure tenancies and seeking to offer social rent whenever possible. Taking into account feedback from the tenants on suggested improvements Council Officers have amended the final documents to include clearer reference to other Policies, Strategies, Guidance and Legislation referenced within Tenancy Strategy and Tenancy Policy and the on-line consultation questionnaire was updated and made clearer.</p> <p>Overall, the majority of all the respondents strongly agreed or agreed with all the proposals within the Tenancy Strategy and Policy and found both straightforward to follow. Further feedback was also</p> |
|-------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

| | | |
|-----|------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | <p>received agreeing with the key aims of supporting tenants in their homes, regular visits to ensure homes were of a decent standard and keeping in contact with tenants to better understand their needs around health and to help older tenants to move to smaller more suitable homes if required. Dealing with ASB was also agreed as a priority and keeping the Tenancy Strategy and Policy under review to ensure they are kept up to date with any changes in legislation.</p> <p>This supports the recommendation to Cabinet to approve the new strategy and policy.</p> |
| 19. | If you have not done any consultations or collected data & information, are you planning to do so in the future? | n/a |

Section 4: Impact analysis.

| | | | | | |
|-----|-------------------------------|----------------------------------|-----------------------------------------|-----------------------------|-------------------------------------|
| 20. | Who does the activity impact? | Service Users | Yes <input checked="" type="checkbox"/> | No <input type="checkbox"/> | Don't Know <input type="checkbox"/> |
| | | Members of staff | Yes <input checked="" type="checkbox"/> | No <input type="checkbox"/> | Don't Know <input type="checkbox"/> |
| | | General public | Yes <input checked="" type="checkbox"/> | No <input type="checkbox"/> | Don't Know <input type="checkbox"/> |
| | | Partner / Community Organisation | Yes <input checked="" type="checkbox"/> | No <input type="checkbox"/> | Don't Know <input type="checkbox"/> |
| | | City Councillors | Yes <input checked="" type="checkbox"/> | No <input type="checkbox"/> | Don't Know <input type="checkbox"/> |

| | | | | | |
|--|--|------------------------------------------|-----------------------------------------|-----------------------------|-------------------------------------|
| | | Council suppliers and contractors | Yes <input checked="" type="checkbox"/> | No <input type="checkbox"/> | Don't Know <input type="checkbox"/> |
|--|--|------------------------------------------|-----------------------------------------|-----------------------------|-------------------------------------|

| 21. | Does the activity impact positively or negatively on any protected characteristics as stated within Equality (Act 2010)? | | | | | |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Protected Characteristic | Positive | Negative | Neutral | Don't know | Data/information/evidence supporting your assessment | Analysis & insight Mitigations |
| Age 288 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | <input type="checkbox"/> | The Council has consulted with registered providers of social housing and all residents of Oxford (including tenants and prospective tenants) with the results outlined in this document. | It is expected that this the Tenancy Strategy and Tenancy Policy will have a net benefit for older people as it promotes issuing lifelong tenancies at a social rent (or affordable rent capped at LHA) which offers long term tenancy security. |
| Disability | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | The Council has consulted with registered providers of social housing and all residents of Oxford (including tenants and prospective tenants) with the results outlined in this document. | It is expected that this the Tenancy Strategy and Tenancy Policy will have a net benefit for people with a disability as it promotes issuing lifelong tenancies at a social rent (or affordable |

| | | | | | | |
|-------------------------------------------|---|--------------------------|--------------------------|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | | | | | rent capped at LHA) which offers long term tenancy security. |
| Gender re-assignment | X | <input type="checkbox"/> | | <input type="checkbox"/> | The Council has consulted with registered providers of social housing and all residents of Oxford (including tenants and prospective tenants) with the results outlined in this document. | It is expected that this the Tenancy Strategy and Tenancy Policy will have a net benefit for people who have been through gender reassignment as it promotes issuing lifelong tenancies at a social rent (or affordable rent capped at LHA) which offers long term tenancy security. |
| Marriage & Civil Partnership | X | <input type="checkbox"/> | | <input type="checkbox"/> | The Council has consulted with registered providers of social housing and all residents of Oxford (including tenants and prospective tenants) with the results outlined in this document. | It is expected that this the Tenancy Strategy and Tenancy Policy will have a net benefit for people regarding marriage and civil partnership as it promotes issuing lifelong tenancies at a social rent (or affordable rent capped at LHA) which offers long term tenancy security. |
| Race, Ethnicity and/or Citizenship | X | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | The Council has consulted with registered providers of social housing and all residents of Oxford (including tenants and prospective | It is expected that this the Tenancy Strategy and Tenancy Policy will have a net benefit for people of differing race, ethnicity and/or |

| | | | | | | |
|----------------------------------|---|--------------------------|--|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | | | | tenants) with the results outlined in this document. | citizenship as it promotes issuing lifelong tenancies at a social rent (or affordable rent capped at LHA) which offers long term tenancy security. |
| Pregnancy & Maternity | X | <input type="checkbox"/> | | <input type="checkbox"/> | The Council has consulted with registered providers of social housing and all residents of Oxford (including tenants and prospective tenants) with the results outlined in this document. | It is expected that this the Tenancy Strategy and Tenancy Policy will have a net benefit for people who are pregnant as it promotes issuing lifelong tenancies at a social rent (or affordable rent capped at LHA) which offers long term tenancy security. |
| Religion or Belief | X | <input type="checkbox"/> | | <input type="checkbox"/> | The Council has consulted with registered providers of social housing and all residents of Oxford (including tenants and prospective tenants) with the results outlined in this document. | It is expected that this the Tenancy Strategy and Tenancy Policy will have a net benefit for people who have different religions and beliefs as it promotes issuing lifelong tenancies at a social rent (or affordable rent capped at LHA) which offers long term tenancy security. |
| Sex | X | | | <input type="checkbox"/> | The Council has consulted with registered providers of social | It is expected that this the Tenancy Strategy and Tenancy Policy will |

| | | | | | | |
|-----|---------------------------|-------------------------------------|--------------------------|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| | | | | | housing and all residents of Oxford (including tenants and prospective tenants) with the results outlined in this document. | have a net benefit for people who have different sexes and beliefs as it promotes issuing lifelong tenancies at a social rent (or affordable rent capped at LHA) which offers long term tenancy security. |
| 291 | Sexual Orientation | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <p>The Council has consulted with registered providers of social housing and all residents of Oxford (including tenants and prospective tenants) with the results outlined in this document.</p> <p>www.oxford.gov.uk</p> <p>OXFORD CITY COUNCIL</p> | It is expected that this the Tenancy Strategy and Tenancy Policy will have a net benefit for people who have different sexual orientation and beliefs as it promotes issuing lifelong tenancies at a social rent (or affordable rent capped at LHA) which offers long term tenancy security. |

| | | | | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------------------|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Socio-economic inequalities such as: - income and factors that impact income. -access to jobs This was voluntarily adopted by Oxford City Council on the 13th of March 2024. | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | The Council has consulted with registered providers of social housing and all residents of Oxford (including tenants and prospective tenants) with the results outlined in this document. | It is expected that this the Tenancy Strategy and Tenancy Policy will have a net benefit for people who have different socio-economic backgrounds as it promotes issuing lifelong tenancies at a social rent (or affordable rent capped at LHA) which offers long term tenancy security. |
| Other (voluntary consideration) Sanctuary seeking status leading to intersecting inequalities experienced by | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | The Council has consulted with registered providers of social housing and all residents of Oxford (including tenants and prospective tenants) with the results outlined in this document. | It is expected that this the Tenancy Strategy and Tenancy Policy will have a net benefit for people for people seeking sanctuary as it promotes issuing lifelong tenancies at a social rent (or affordable rent capped at LHA) which offers long term tenancy security. |

Section 5: Conclusion(s) of your Full Impact Assessment

| | | | | | | | |
|-----|--------------------------|-----------------------------------|--------------------------|------------------------------------------------------------------------|-------------------------------------|---------------------------------------------------------------------------------------|--------------------------|
| 22. | Conclusions. | | | | | | |
| | <input type="checkbox"/> | Stop and reconsider the activity. | <input type="checkbox"/> | Adjust activity before beginning the activity and continue to monitor. | <input checked="" type="checkbox"/> | No major change(s) or adjustments and continue with activity but continue to monitor. | <input type="checkbox"/> |

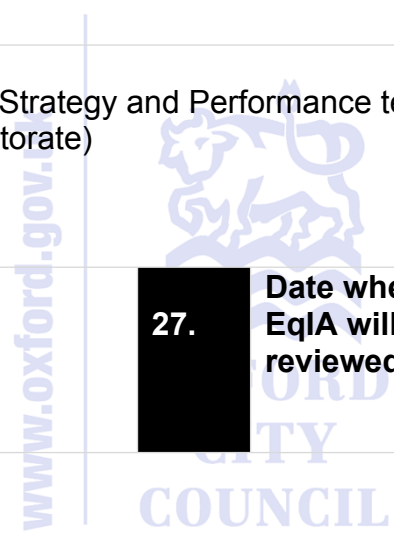
| | | |
|-----|-------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 23. | Please explain how you have reached your conclusions above. | <p>Benefits of Implementation: Provides a framework for registered providers of social housing to promote long term secure and affordable tenancies for all social housing tenants.</p> <p>Promotes Equity: Ensures everyone has equal opportunities.</p> <p>Enhances Diversity: Ensures that people from different backgrounds have a secure home that is affordable and promotes co-ordination between the Council and local registered providers to promote better quality homes, neighbourhoods and communities.</p> <p>Improves Representation: Ensures understands how registered providers will manage social housing tenancies to improve access and representations for all residents.</p> |
| | | |

Section 6: Monitoring and review plan.

The responsibility for maintaining a monitoring arrangement of the EqlA action plan lies with the service/team completing the EqlA.

These arrangements must be built into the performance management framework such as KPIs or Risk Registers.

| | | | | |
|-----|-----------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------|---------------|
| 24. | Who or which team or service area will be responsible for monitoring equalities impact? | The Housing Strategy and Performance team within Housing Services (City & Citizens directorate) will be responsible for monitoring equalities impact through the course of the strategy lifetime in line with the monitoring and review requirements as set out in the documents. | | |
| 25. | Who (individual, team, or service area) will be responsible for carrying out the EqlA review? | The Housing Strategy and Performance team within Housing Services (City & Citizens directorate) | | |
| 26. | How often will the equality impact be reviewed for this activity? | Yearly | 27. Date when the EqlA will be reviewed again. | December 2026 |



Section 7: Sign-off

Name: Stephen Cohen

Name:

Name: Full Name

Job Title: Refugee and Resettlement Manager

Job Title:

Job Title: Type here

Signature:

Stephen Chen

Signature:

Signature:

Name: **Gail Malkin**

Job Title: Head of People

Signature:

G Malkin

Name: Full Name

Job Title: Type here

Signature:

Name: Full Name

Job Title: Type here

Signature:

Name: Full Name

Job Title: Type here

Signature:

Name: Full Name

Job Title: Type here

Signature:

Name: Full Name

Job Title: Type here

Signature:

You have now reached the end of the assessment.

⚠ Please appended this to any reports and project files for reference.

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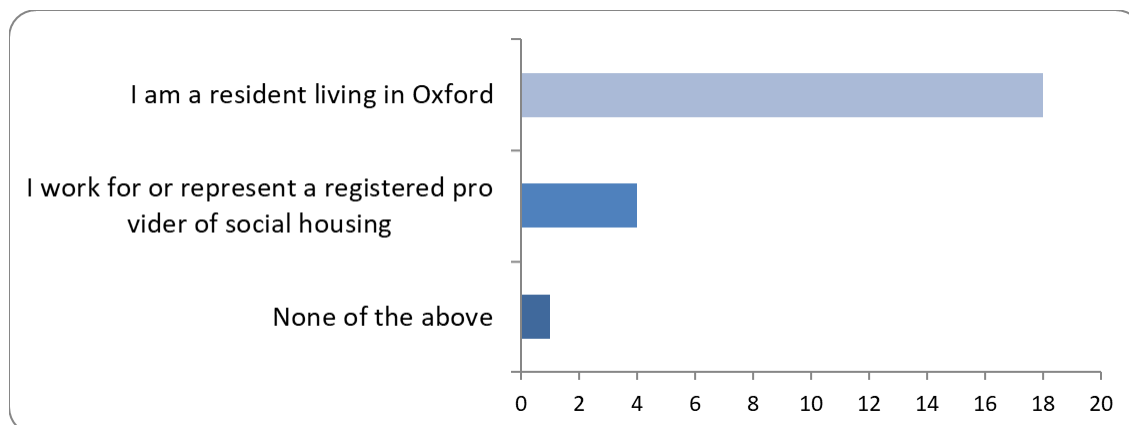
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Appendix 5: Tenancy Strategy and Policy Survey Consultation Response

1: Please select the option that best describes you:

capacity

There were 23 responses to this part of the question.



| Option | Total | Percent |
|-----------------------------------------------------------------|-------|---------|
| I am a resident living in Oxford | 18 | 78.26% |
| I work for or represent a registered provider of social housing | 4 | 17.39% |
| I work for or represent a charity / voluntary organisation | 0 | 0.00% |
| None of the above | 1 | 4.35% |
| Not Answered | 0 | 0.00% |

2: If applicable, which registered provider are you representing / do you work for?

name of registered provider

There were 7 responses to this part of the question.

3: If applicable, which voluntary organisation / charity are you representing / do you work for?

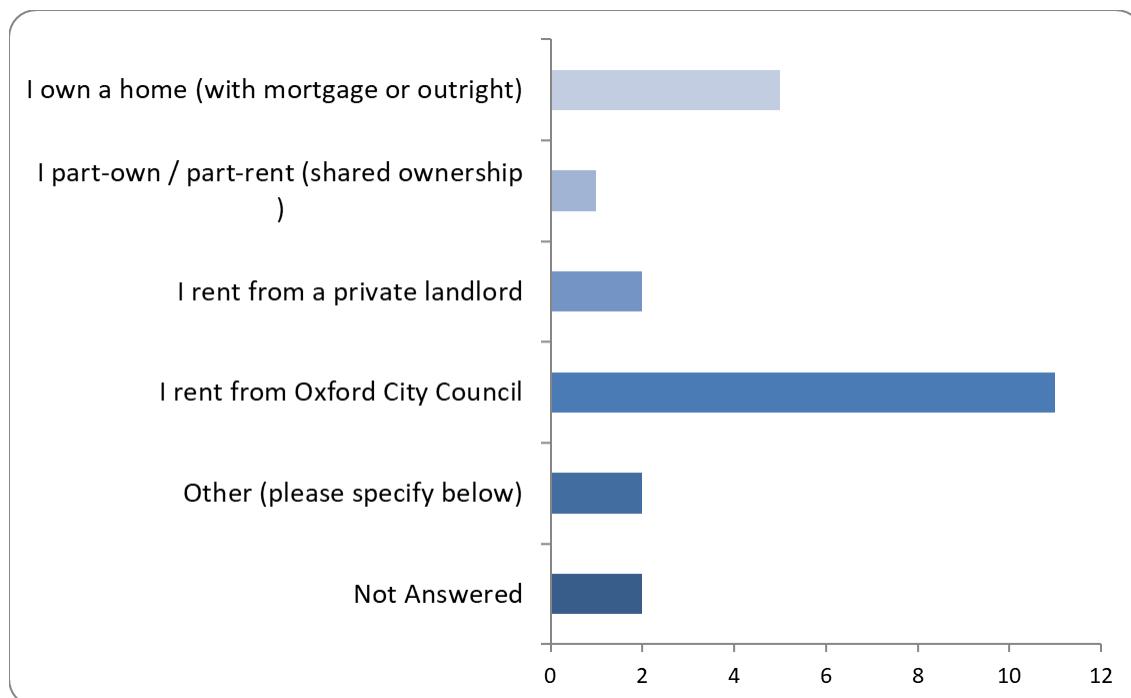
voluntary organisation name

There were 0 responses to this part of the question.

4: What is your housing situation?

housing situation

There were 21 responses to this part of the question.



| Option | Total | Percent |
|---------------------------------------------------------|-------|---------|
| I own a home (with mortgage or outright) | 5 | 21.74% |
| I part-own / part-rent (shared ownership) | 1 | 4.35% |
| I rent from a private landlord | 2 | 8.70% |
| I rent from Oxford City Council | 11 | 47.83% |
| I rent from a housing association (registered provider) | 0 | 0.00% |
| I live in temporary accommodation | 0 | 0.00% |
| Other (please specify below) | 2 | 8.70% |
| Not Answered | 2 | 8.70% |

other

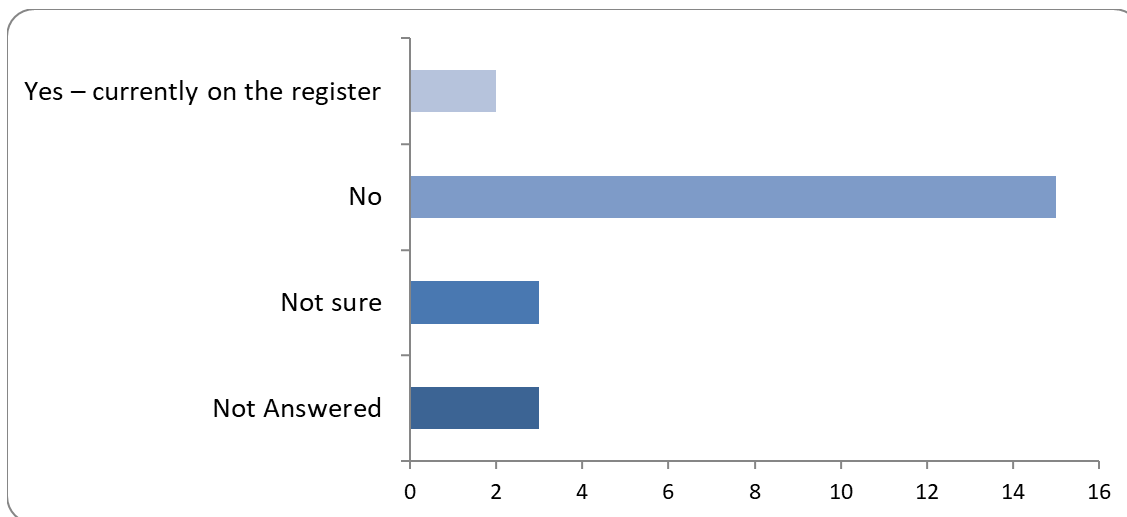
There were 2 responses to this part of the question.

5: Are you currently on the Housing Register* in Oxford, or have you applied to join?

*The Housing Register is referring to applicants applying for an offer of social housing from the Council or a Registered Provider of Social Housing/Housing Association (not Shared Ownership or a Mutual Exchange).

housing register application

There were 20 responses to this part of the question.

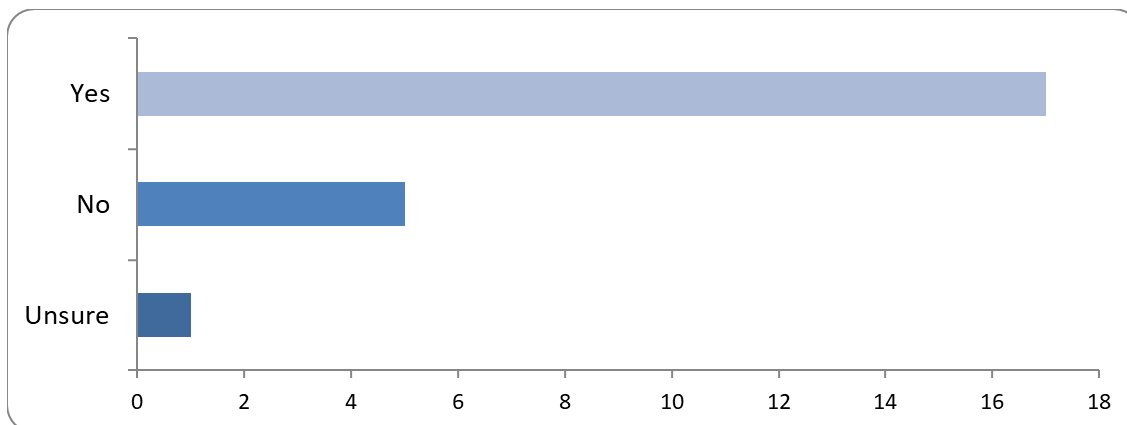


| Option | Total | Percent |
|------------------------------------|-------|---------|
| Yes – currently on the register | 2 | 8.70% |
| Yes – applied but not yet accepted | 0 | 0.00% |
| No | 15 | 65.22% |
| Not sure | 3 | 13.04% |
| Not Answered | 3 | 13.04% |

6: Do you agree that registered providers should offer "lifetime" (secure or assured) tenancies?

agree with secure tenancies

There were 23 responses to this part of the question.

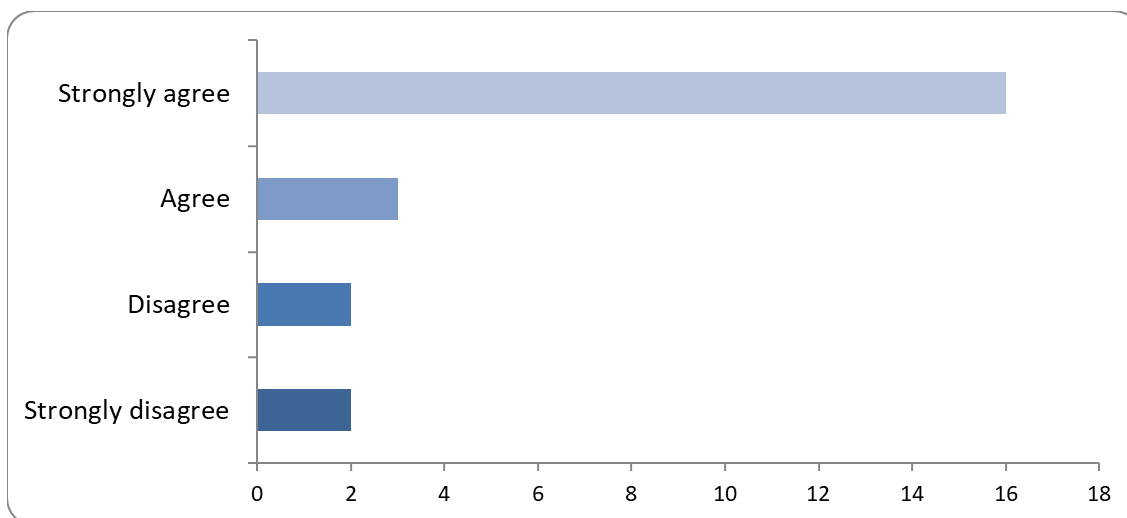


| Option | Total | Percent |
|--------------|-------|---------|
| Yes | 17 | 73.91% |
| No | 5 | 21.74% |
| Unsure | 1 | 4.35% |
| Not Answered | 0 | 0.00% |

7: The focus for registered providers should be on providing tenancies at social rent levels.

social rent as preferred rent level

There were 23 responses to this part of the question.



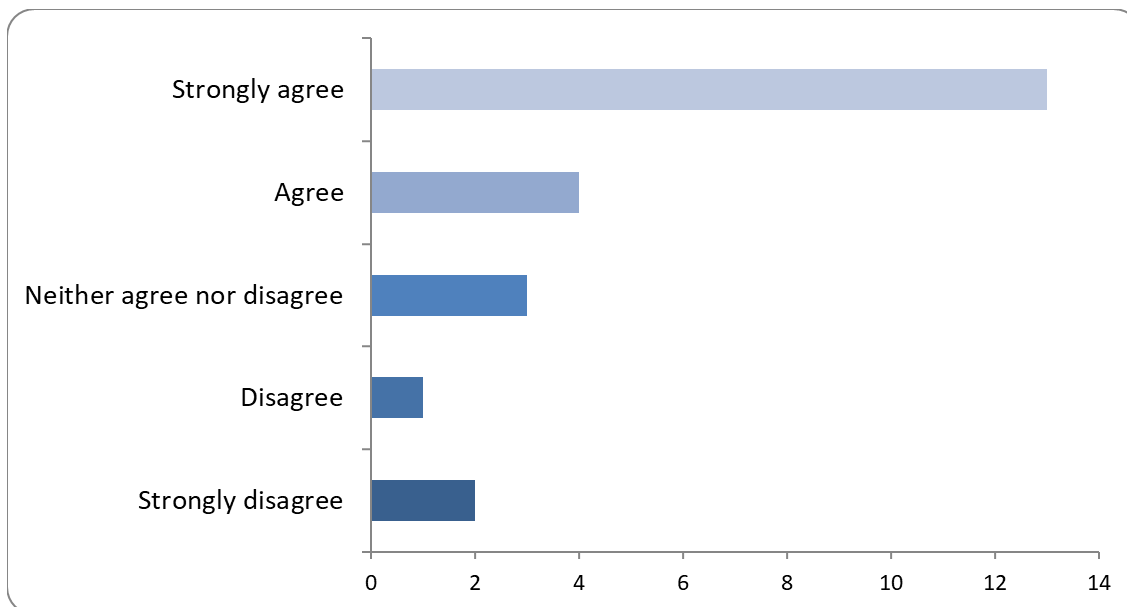
| Option | Total | Percent |
|----------------|-------|---------|
| Strongly agree | 16 | 69.57% |
| Agree | 3 | 13.04% |

| | | |
|-----------------------------------|---|-------|
| Neither agree nor disagree | 0 | 0.00% |
| Disagree | 2 | 8.70% |
| Strongly disagree | 2 | 8.70% |
| Not Answered | 0 | 0.00% |

8: Affordable Rents, if used, should be capped at LHA (Local Housing Allowance) levels.

affordable rent tenures

There were 23 responses to this part of the question.

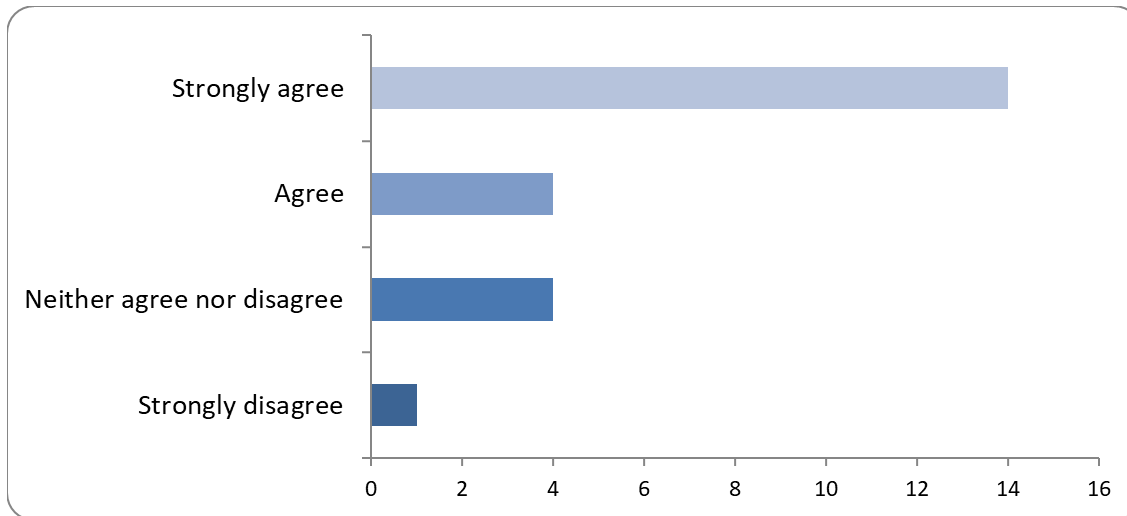


| Option | Total | Percent |
|-----------------------------------|--------------|----------------|
| Strongly agree | 13 | 56.52% |
| Agree | 4 | 17.39% |
| Neither agree nor disagree | 3 | 13.04% |
| Disagree | 1 | 4.35% |
| Strongly disagree | 2 | 8.70% |
| Not Answered | 0 | 0.00% |

9: When developing shared ownership properties, registered providers should set rents at an affordable level.

shared ownership and affordability expectations

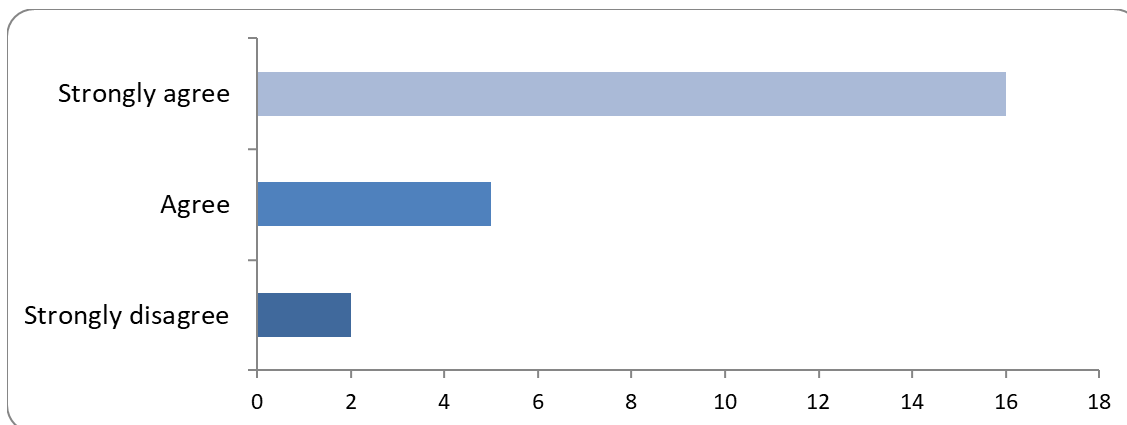
There were 23 responses to this part of the question.



| Option | Total | Percent |
|----------------------------|-------|---------|
| Strongly agree | 14 | 60.87% |
| Agree | 4 | 17.39% |
| Neither agree nor disagree | 4 | 17.39% |
| Disagree | 0 | 0.00% |
| Strongly disagree | 1 | 4.35% |
| Not Answered | 0 | 0.00% |

10: Personalised support should be offered by registered providers to tenants at risk of eviction or struggling to maintain their tenancy.

There were 23 responses to this part of the question.

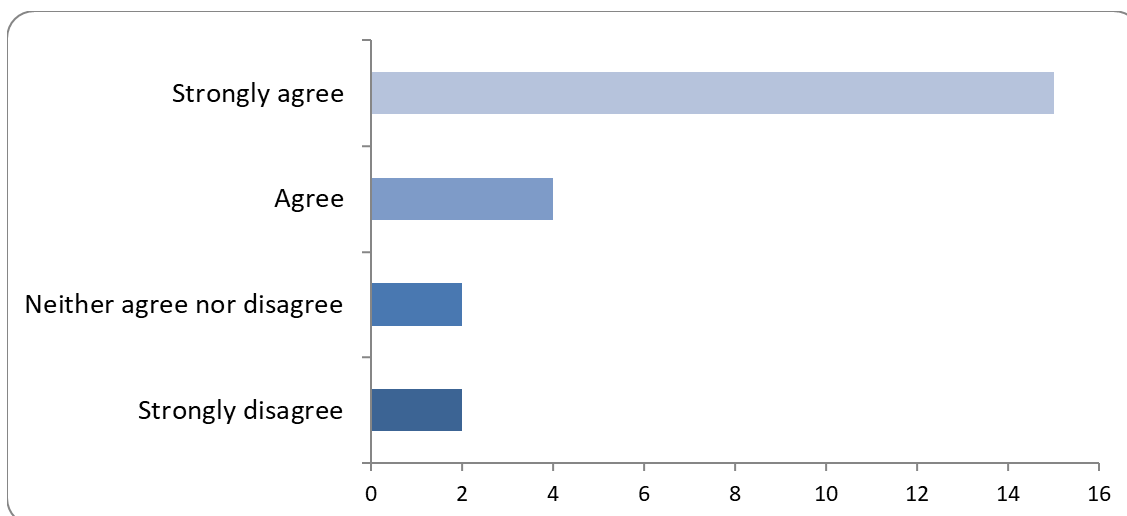


| Option | Total | Percent |
|----------------------------|-------|---------|
| Strongly agree | 16 | 69.57% |
| Agree | 5 | 21.74% |
| Neither agree nor disagree | 0 | 0.00% |
| Disagree | 0 | 0.00% |
| Strongly disagree | 2 | 8.70% |
| Not Answered | 0 | 0.00% |

11: Registered providers should adopt a strong, survivor-led approach to supporting tenants affected by domestic abuse.

domestic abuse

There were 23 responses to this part of the question.



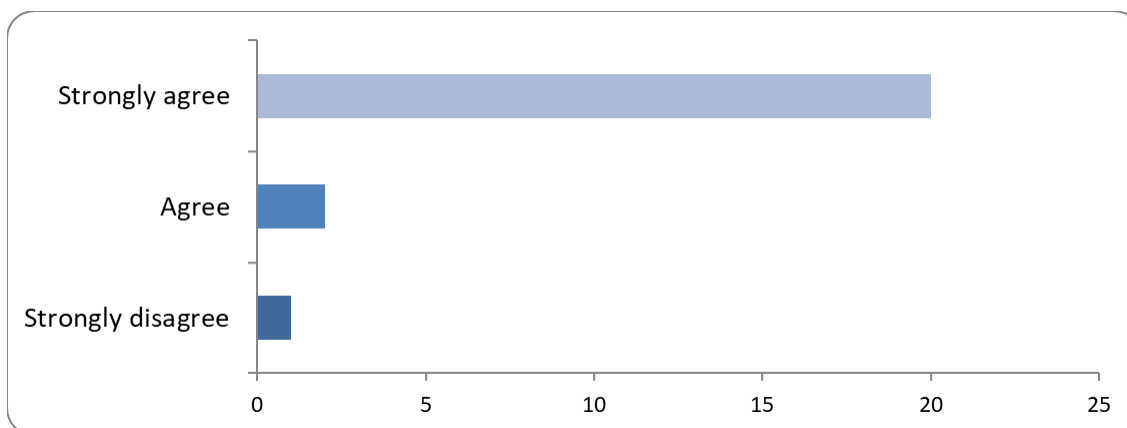
| Option | Total | Percent |
|--------|-------|---------|
|--------|-------|---------|

| | | |
|-----------------------------------|----|--------|
| Strongly agree | 15 | 65.22% |
| Agree | 4 | 17.39% |
| Neither agree nor disagree | 2 | 8.70% |
| Disagree | 0 | 0.00% |
| Strongly disagree | 2 | 8.70% |
| Not Answered | 0 | 0.00% |

12: Housing and tenancy management services should be responsive and engage in partnership working to address anti-social behaviour.

anti-social behaviour

There were 23 responses to this part of the question.

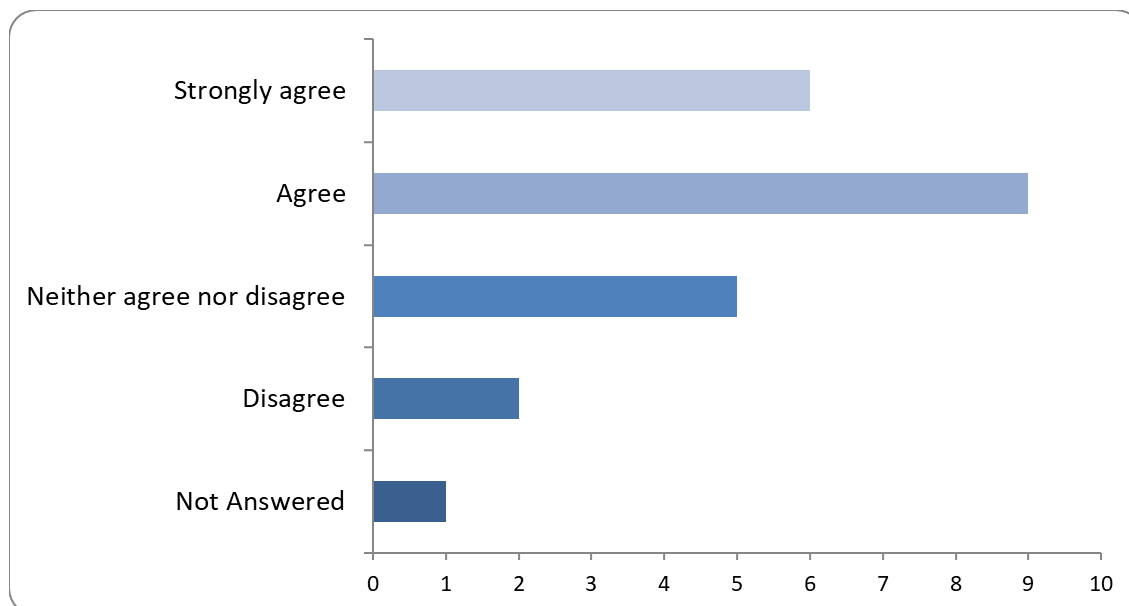


| Option | Total | Percent |
|-----------------------------------|--------------|----------------|
| Strongly agree | 20 | 86.96% |
| Agree | 2 | 8.70% |
| Neither agree nor disagree | 0 | 0.00% |
| Disagree | 0 | 0.00% |
| Strongly disagree | 1 | 4.35% |
| Not Answered | 0 | 0.00% |

13: Please indicate how far you agree that the Tenancy Strategy and the Tenancy Policy are written in a straightforward format that is easy to follow and understand.

language - The Tenancy Strategy

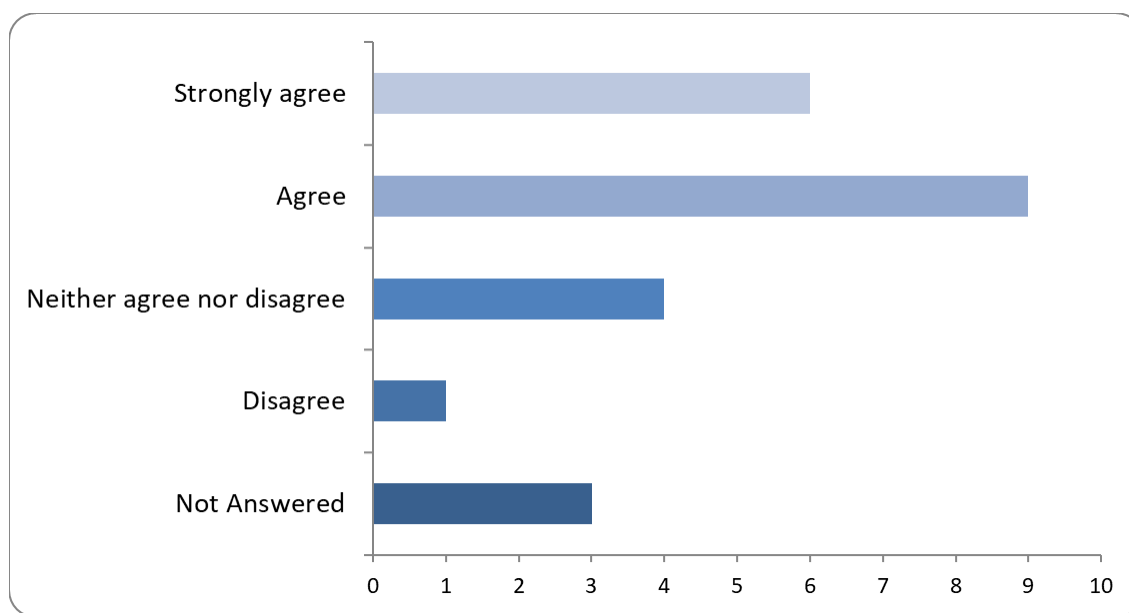
There were 22 responses to this part of the question.



| Option | Total | Percent |
|----------------------------|-------|---------|
| Strongly agree | 6 | 26.09% |
| Agree | 9 | 39.13% |
| Neither agree nor disagree | 5 | 21.74% |
| Disagree | 2 | 8.70% |
| Strongly disagree | 0 | 0.00% |
| Not Answered | 1 | 4.35% |

language - The Tenancy Policy

There were 20 responses to this part of the question.



| Option | Total | Percent |
|----------------------------|-------|---------|
| Strongly agree | 6 | 26.09% |
| Agree | 9 | 39.13% |
| Neither agree nor disagree | 4 | 17.39% |
| Disagree | 1 | 4.35% |
| Strongly disagree | 0 | 0.00% |
| Not Answered | 3 | 13.04% |

14: Do you have any other feedback or suggestions to improve the Tenancy Strategy or Tenancy Policy?

Further comments summary

- Supporting the aim that dealing with ASB is a priority due to the impact on residents
- The strategy helps to ensure that is fair and all landlords can refer to this
- Support for tenants is important – including help with repairs/environmental health issues/transfer applications and home visits to homes to ensure they are of a decent standard and any identified works needed are promptly completed or tenants are moved if their home needs re-developing.
- The Strategy and Policy will need to be kept under review to reflect any changes in legislation in the future to remain up to date.

To: Cabinet

Date: 10 December 2025

Report of: Director of Housing

Title of Report: Resident Involvement and Engagement Strategy – 2025/28

| Summary and recommendations | |
|------------------------------|----------------------------------------------------------------------------------------------------------------------|
| Decision being taken: | Report to Cabinet and recommend to Council to approve the new Resident Involvement and Engagement Strategy – 2025/28 |
| Key decision: | Yes. |
| Cabinet Member: | Councillor Linda Smith, Cabinet Member for Housing and Communities |
| Corporate Priority: | Good affordable homes |
| Policy Framework: | Housing, Homelessness & Rough Sleeping Strategy 2023-28 |

| Recommendation(s): That Cabinet resolves to: |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ol style="list-style-type: none"> Approve the draft Resident Involvement and Engagement Strategy (2025 – 2028) and action plan attached to the strategy which outlines how the priorities for resident involvement and engagement will be taken forward Recommend to Council to approve and adopt the new Resident Involvement and Engagement Strategy 2025-2028 Delegate authority to the Director of Housing, in consultation with the Cabinet Member for housing and Communities, on approval of the strategy, to put in place the necessary governance and monitoring arrangements to oversee the implementation and delivery of the strategy as well as to make any minor amendments reflective of legislative changes or best practice. |

| Appendix No. | Appendix Title | Exempt from Publication |
|-------------------|--------------------------------------------------------|-------------------------|
| Appendix 1 | Resident Involvement and Engagement Strategy – 2025/28 | No |
| Appendix 2 | Equality Impact Assessment | No |

| | | |
|------------|---------------|----|
| Appendix 3 | Risk Register | No |
|------------|---------------|----|

Introduction and Background

1. Following the Grenfell tragedy, the Social Housing Regulation Act 2023 sought to strengthen the voice of tenants by setting out clearer expectations of social landlords. The *Transparency, Influence and Accountability Standard Consumer Standards 1 April 2024* (“the *Transparency, Influence and Accountability Standard*”) requires the landlord to be open with tenants and treat them with fairness and respect so that they can access services, raise concerns, when necessary, influence decision making and hold their landlord to account.
2. This is essentially a call for a change to a two-way conversation between tenant and landlord – where there is a need to give tenants their voice by providing meaningful engagement opportunities to enable them to influence and scrutinise the Council’s strategies, policies and services, and where the landlord in turn is able to engage and communicate clearly with tenants.
3. In December 2024, Cabinet considered and approved a proposed change of resident engagement approach in principle, subject to consultation with residents. In taking this forward, a series of engagement events were held during the spring and summer of 2025 where residents were consulted on the proposed engagement changes. Overall, the proposed changes were supported by over 400 residents who participated and this in turn has enabled the development of a new Resident Involvement and Engagement Strategy for the next three years and is attached in **Appendix 1**.
4. The Resident Involvement and Engagement Strategy 2025/28 and related action plan sets out how the Council will look to improve resident engagement and meet its landlord obligations required by *Transparency, Influence and Accountability Standard*. The strategy recognises the changing landscape and need for stepping up efforts to improve resident engagement ensuring that residents voice forms part of service delivery and that meaningful engagement platforms and support are in place. This approach will enable residents to have better opportunities to influence, help shape and scrutinise the quality and delivery of services they receive. The strategy also signals a clear approach and cohesive direction of travel on resetting resident engagement through an improved resident involvement and engagement offer which involves formal and informal engagement structures. It sets out the plans for pursuing the *knowing our tenants* programme and using this data to increase resident involvement and engagement and deliver better services that better meets the needs of residents.
5. The Regulator of Social Housing (RSH) considers resident engagement a core part of its regulatory requirements under the new *Transparency, Influence and Accountability Standard*. It expects social landlords to demonstrate how they are working with residents on issues that matter to them, allowing participation at all levels and stages. It also expects that Landlords should be able to show how they are communicating and working with residents throughout the engagement process. This strategy seeks to support Oxford City Council in meeting those requirements.

6. Cabinet approval and recommendation to Council is therefore now sought for the new strategy that will enable the continuation of communication and engagement with residents to jointly take forward the strategic priorities and action plan contained within the strategy.

Transforming resident engagement and involvement

6. OCC is a landlord managing a substantial social housing portfolio, comprising over 8,000 properties. These homes provide accommodation to approximately 24,000 residents across the city. Within this, it is facing major radical changes arising from stricter government regulation and enforcement to improve safety, transparency, and standards for residents. To ensure compliance a new Social Housing Regulator (SHR) has been established with powers to proactively inspect landlords, through a set of four Consumer Standards (*1. Safety and Quality, 2. Tenancy, 3. Neighbourhood and Community and 4. Transparency, Influence and Accountability Standard*) together these make up a mandatory framework for landlords to comply.
7. These new requirements alongside the feedback received from a series of engagement events that took place during spring and summer of this year together they have provided a clear acknowledgment that improvements must be made in how OCC engages with its residents. There is also a recognition that there is a need to modernise engagement approaches to ensure that social housing residents who directly experience delivery of housing services—are genuinely involved in shaping how those services are provided. The proposals and action plan outlined in the strategy form part of a wider comprehensive suite of transformation changes taking place throughout the landlord service. Collectively, these changes will enable the housing service to be better structured and placed to deliver better outcomes for residents.
8. Central to the proposals set out in the strategy is also the alignment of OCC's strategic priorities for housing which also seek to ensure the provision of good landlord services and that it ensures residents have more say in the way their homes and communities are managed, embracing diversity and delivering active community involvement. Together, this means that through this strategy there is meaningful commitment to developing the right engagement platforms, the right tools and the right information, offering the support and training necessary for tenants and leaseholders to feel empowered and enabling them to participate fully fostering more effective and meaningful involvement and engagement.

A new resident engagement and involvement strategy

9. The series of engagement events and feedback from residents that took place during the spring and summer of 2025 has been fundamental in preparing the proposals within this strategy. Feedback recognised at the core that improvements were needed on building trust, being heard and building a better relationship between tenants and the Council as a landlord. This has led to acknowledging that relationship with tenants needed to go beyond bricks and mortar – residents want to be heard, feel informed and be involved in improving the quality of services they receive. Taking this into consideration the strategy has been developed on the following four principles;
 - Reset engagement and resident relationships
 - Actively listen to our residents
 - Respond to residents' priorities and their concerns
 - Embed meaningful and effective involvement and engagement structures

Knowing residents, understanding their needs and priorities

10. Meaningful engagement that truly reflects the diverse voices including those who are silent or under presented requires a good understanding of residents and their needs. Recognising this, the strategy sets out how it will pursue the continuation of the ***Knowing our residents*** programme which is helping to gather data about residents and their needs including their vulnerabilities. This intelligence will help shape improvement plans and engagement activity around what we know about resident's needs – for eg; better balance online and in-person events, tailor approach and reach out to those with mobility or language barriers and be more visibly present in the community and evidence our commitment change and engagement
11. The feedback from residents also provided a better understanding of their top ten priorities and their expectations from OCC as a landlord. These are summarised as follows;

| | | | |
|----|--------------------------------------------|-----|------------------------------------|
| 1. | Building safety | 6. | A landlord service offer |
| 2. | Better resident involvement and engagement | 7. | Visible and accessible services |
| 3. | Better communication | 8. | Consistent delivery of services |
| 4. | Better handling of complaints | 9. | Accessible policies and procedures |
| 5. | Better handling of repairs | 10. | Training and support |

12. Understanding residents' needs and their priorities forms a fundamental part of this strategy and this has also guided the development of the strategic proposals, vision and priorities for residents.

Proposals for resetting resident engagement – A resident involvement and engagement offer

13. This strategy proposes an outline of a new more structured resident involvement and engagement offer - which has been jointly developed with residents throughout the design process. The core aim has been to provide a variety of platforms that can cater to the diverse needs and preferences of our residents.
14. This approach encompasses both 'formal' Council-wide structures and more 'informal' local, one-off opportunities. We expect that the formal mechanisms will enable residents to participate in structured, ongoing involvement at a Council-wide level, ensuring their voices contribute to major decisions and policy development. In contrast, informal opportunities are set out to be more accessible and flexible, allowing residents to engage on an ad hoc basis within their local communities when it suits them best. By offering a range of engagement options, our approach ensures that all residents—regardless of their level of interest or availability—have meaningful opportunities to have their say and influence the services they receive. This dual approach underpins our commitment to fostering a genuinely inclusive and responsive resident engagement culture.

A vision for resident involvement and engagement

15. Taking in consideration the feedback from residents, the challenges they face, their expectations from OCC as a landlord has enabled the creation of our vision for residents and reflected in the strategy:

“We will work to enable every opportunity for residents to engage with us in ways that suit them, delivering meaningful and outcome-focused resident involvement where they can influence, scrutinise and shape the delivery of the services they receive”

16. In setting out the vision, this has naturally led to developing our five strategic priorities that we will seek to deliver through this strategy over the next two years – 2025/28

| Priority 1 | Priority 2 | Priority 3 | Priority 4 | Priority 5 |
|----------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------|
| Establish and embed the right foundations and culture for meaningful resident engagement and involvement | Establish meaningful resident engagement platforms that are representative and inclusive of our resident community | Develop our knowledge about our residents to deliver services that better meets their needs | Review and strengthen our communication with residents to foster respectful engagement that is inclusive and in ways that meets residents needs | Deliver high quality landlord services to tenants ensuring these exhibit the right behaviours and outcomes for residents |

Delivering our strategic priorities and action plan

Empowering residents and supporting staff to deliver

17. Throughout the strategy, we recognise that, to ensure meaningful and effective resident involvement and engagement, we will need to provide residents with appropriate support. This includes offering training opportunities specifically designed to equip them with the knowledge and skills required to carry out their representative and scrutiny roles effectively. We are confident that by providing this support, we will empower our residents to participate confidently, ensuring that their contributions have a real impact on the decisions and improvements that affect their homes and local areas.
18. To deliver this strategy, we must also ensure that the right internal resources are in place. The dedicated Resident Involvement and Engagement Team will support the co-ordination of engagement activities and support service teams with practical support. We will also ensure that the team is supported and provided with the right training and support to carry out their roles effectively. The team will also be responsible for working with resident groups to assess the success of this strategy. Where appropriate, the council will also consider the provision of other resources such as financial and all other associated costs to secure delivery of objectives.

Monitoring delivery

19. To assess the positive outcomes of this resident engagement strategy, we will regularly monitor and report the outcomes of engagement activities against our strategic objectives, identifying areas where resident feedback has directly contributed to tangible improvements. We will also track participation rates, monitor the diversity of those involved and measure the extent to which resident input has influenced service delivery and decision-making processes.
20. In line with RSH requirements, we will also provide and publish the outcomes that this strategy is achieving to our residents on a regular basis. We will also expect to be able to demonstrate to them the positive changes in service quality, resident satisfaction, and trust as a direct result of our engagement efforts – including the difference it is making to ensure engagement and representation from our vulnerable and diverse resident groups has been successfully captured.

Financial implications

21. The proposals within this strategy are intended to be cost neutral and can be delivered using existing approved budgets for resident engagement. Any additional financial implications arising from implementation will be maintained within the wider HRA housing service budgets and subject to relevant financial governance processes.

Legal issues

22. This strategy will contribute and support the Council's requirement and compliance with the Social Housing Act 2023 and the Regulator for Social Housing associated Consumer Standards – in particular the *Transparency, Influence and Accountability Standard Consumer Standards 1 April 2024*.
23. The Housing Ombudsman's Complaint Handling Code recommends consultation with a relevant resident panel on complaints policies and procedures and that a relevant resident panel receive reports on feedback, learning, and improvements arising from the complaints process.

Level of risk

24. The risks of not meeting social housing regulator requirements include regulatory action, such as performance improvement plans or the potential for financial penalties. This can lead to a loss of public trust, damage the Council's reputation, and a negative impact on building good working relations with residents and meeting the strategic vision and action plan.

Equality impact

27. An Equality Impact Assessment has been completed and is attached as **Appendix 2**.

Carbon and Environmental Considerations

28. The adoption of this strategy may go towards helping reduce carbon emissions by ensuring housing services are available locally. The inclusion of digital engagement channels will also help reduce the carbon footprint.

| | |
|----------------------------|----------------------------------------------------------------|
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OXFORD
CITY COUNCIL



Resident Involvement and Engagement Strategy

2025/2028

Foreword

CLLR LINDA SMITH – CABINET LEAD MEMBER FOR HOUSING

I am pleased to introduce this new Resident Involvement and Engagement Strategy 2025-2028 which has been jointly prepared in collaboration with our residents and key stakeholders. This new strategy sets out our renewed approach and strengthens our commitment to resident involvement and engagement as an essential aspect of our housing service delivery.

This is a time for radical change in how we involve and engage with our residents and how we are transforming our landlord service to deliver better outcomes for our residents. From our engagement with our residents, we know they face their own challenges managing their homes, but they also want assurance that we are a compliant landlord, keeping them safe and one that listens and acts on their concerns. All this has meant that the breadth and variety of their needs have expanded and indeed their reasons and need for wanting to better engage with us – and we must rise and respond to this challenge. This strategy therefore reflects our overarching five key priorities and actions that we intend to deliver jointly with our residents over the next three years.

I commend this Resident Involvement and Engagement Strategy which marks a significant milestone in our transformation housing journey. I encourage our residents and key stakeholders to continue to engage and work with us in our commitment to co-creating a future that puts residents at the heart of our service delivery.

BRENDA WALTON AND ASHAD ALI, RESIDENTS AND CO-DESIGN GROUP MEMBERS

As tenants and leaseholders, many of us have grown up and brought up our families here in Oxford and we are proud of where we live and our neighbourhoods.

Many of us have also participated and have been part of Tenant Involvement Groups for many years working hard to improve the living standards of our homes and the areas where we live.

Whilst we acknowledge that this has not always been easy and at times, we have felt that our voices were not being heard with decisions being made about us and our homes without us – this needs to change.

However, the Oxford City Council housing service is at a turning point – prompted by more robust housing legislation and a commitment to change to improve how it engages and involves residents in the delivery of their services.

This presents an excellent opportunity for us as residents to claim our seat at the table, influence and have our voices heard.

Thanks to co-design groups, forums, and good old conversations, we can finally help shape real change. We are convinced that if more of us join in, we will make a difference, ensure our homes are safe and we will build places where everyone feels respected, supported, and heard.

We commend this strategy and call on our fellow residents to feel empowered, join us in this journey so we can influence, and shape engagement plans that best meets our resident needs.

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1. Executive Summary:

Oxford City Council - Resident Involvement and Engagement Strategy 2025–2028

Oxford City Council (OCC) housing service manages over 8,000 social housing properties, serving approximately 24,000 residents. This strategy outlines a transformative approach to resident involvement and engagement, driven by regulatory standards, local priorities and direct feedback from tenants, leaseholders and shared owners.

Based on what residents have told us, the strategy aims to reset relationships with residents by embedding meaningful engagement, improving service delivery, fostering trust and transparency. It is built on four principles:

- Delivering the promise to reset involvement, engagement and resident relationships
- Actively listen to our residents
- Respond to residents' priorities and their concerns
- Embed meaningful and effective involvement and engagement across our organisation

This strategy also highlights the efforts that will be taken through the *'Knowing Our Residents'* programme which involves deploying a more tailored outreach approach and co-designed platforms for formal and informal participation to help us know and understand residents better. Within this, it has helped us to also shape our vision for our residents:

“We will work to enable every opportunity for residents to engage with us in ways that suit them, delivering meaningful and outcome-focused resident involvement where they can influence, scrutinise and shape the delivery of the services they receive”

Our vision encapsulates the involvement and engagement work we have done so far, what we know of our residents and more importantly reflects what they have told

us. It has also enabled a sound platform from which we developed our 5 strategic priorities that signal our direction of travel for the next 3 years:

1. Establishing foundations for involvement and engagement
2. Enhancing resident knowledge to improve service delivery
3. Co-designing inclusive involvement and engagement platforms
4. Improving communication for respectful, inclusive involvement and engagement
5. Delivering high-quality landlord services aligned with resident expectations

To ensure implementation and delivery of our strategic priorities an action plan has been attached to this strategy [see *Appendix A*]. The action plan aims to provide a more granular insight as to the key actions that will need to be taken forward in order to realise our vision for residents.

The strategy also sets out the arrangements and resources that will be provided for staff and residents, to ensure that both feel empowered, have the tools and the right levels of support to carry out their roles effectively. We are committed to realising real change and we will involve, engage, and work with our residents throughout this transformative involvement and engagement journey.

The proof of our success will be measured and should be seen in the outcomes we expect to see such as increase in satisfaction levels, participation rates from across all of our diverse resident community, and greater transparent reporting and communication that will help to build trust and strong partnerships with our residents.

2. Introduction

Oxford City Council is a landlord managing a substantial social housing portfolio, comprising over 8,000 properties. These homes provide accommodation to approximately 24,000 residents across the city. This extensive housing provision plays a vital role in supporting the diverse needs of our local communities and is central to the Council's commitment to providing safe, secure, and high-quality housing for all tenants, leaseholders and shared owners.

Driving Radical Change in Resident¹ Involvement and Engagement



This is a time for radical change in how we deliver our landlord services to tenants, leaseholders and shared owners. This momentum for transformation is driven not only by the introduction of a refreshed regulatory regime from the Social Housing Regulator but also by a clear acknowledgment that improvements must be made in how we involve and engage with our residents. We recognise the need to modernise our approaches to involvement and engagement, ensuring that tenants, leaseholders and shared owners, who directly experience our services, are genuinely involved in shaping how those services are provided.

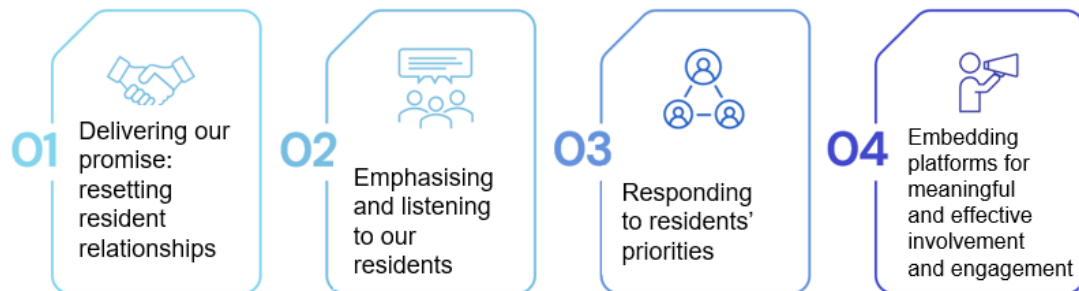
The proposals and action plan outlined in this strategy form part of a wider comprehensive suite of transformation changes taking place throughout our landlord service. Collectively, these changes will enable us to be better structured and thoroughly prepared to achieve our reset involvement and engagement goals.

Central to our approach is the ambition to reset and establish new, effective ways of involving, engaging and working with our residents. This involves developing the right engagement platforms, the right tools and the right information, offering the support and training necessary for residents to feel empowered and enable them to participate fully. By equipping them with the appropriate tools and support, we aim to foster more effective and meaningful involvement and engagement.

¹ In this strategy the term 'resident' refers to anyone living in Oxford City Council-owned properties. This includes tenants, leaseholders and shared owners

3. Purpose of this strategy

Our transformation journey is already underway, and this strategy sets out our plans for realising this vision. It details the specific changes and service improvements we intend to pursue, ensuring that our commitment to better involvement and engagement and service delivery is at the heart of everything we do. Our strategy commitments are based on four key principles: -



Our focus is on transforming and enhancing both engagement and involvement, ensuring residents play a central role in the direction of our housing services.

Listening to the lived experiences and perspectives of our residents is more crucial now than ever before. By giving prominence to the voices of our residents, this strategy provides a framework for implementing significant and lasting changes in how we seek to change and engage with our communities.

A core aspect of our strategy has been the feedback and priorities that our residents have shared with us to date.

This feedback has directly informed our strategic priorities for putting in place involvement and engagement platforms that are accessible and encourage active participation. Through these platforms, residents will have meaningful opportunities to shape, improve, and scrutinise the delivery of our housing services.

Alongside these improvements, this strategy introduces revised involvement and engagement practices founded on the principles of mutual respect, trust, accountability, and transparency.

These values will underpin all interactions, ensuring that involvement and engagement is not only effective but also embedded across services and genuinely collaborative.

4. A changing housing landscape

The national context

Oxford City Council's responsibilities as a social landlord are framed and defined by a comprehensive framework of legislation, regulations, and standards established by Central Government. This evolving regulatory environment places greater emphasis on increased oversight, the introduction of updated consumer standards, and a stronger focus on tenant satisfaction and feedback.

The Social Housing Act 2023 introduces significant reforms, setting out clear expectations for social landlords:

Social Housing White Paper 2020 and Social Housing (Regulation) Act 2023:

The Charter for Social Housing Residents, was released in November 2020.

It outlined that every social housing resident should be able to expect:



Consumer Standards: Landlords are required to comply with more rigorous updated Consumer Standards, ensuring that tenants are provided with safe, high-quality housing and responsive services.

- **The Safety and Quality Standard** which requires landlords to provide safe and good-quality homes for their tenants, along with good-quality landlord services.
- **The Transparency, Influence and Accountability Standard** which requires landlords to be open with tenants and treat them with fairness and respect so they can access services, raise concerns, when necessary, influence decision making and hold their landlord to account.

- **The Neighbourhood and Community Standard** which requires landlords to engage with other relevant parties so that tenants can live in safe and well-maintained neighbourhoods and feel safe in their homes.
- **The Tenancy Standard** which sets requirements for the fair allocation and letting of homes, as well as requirements for how tenancies are managed by landlords

Tenant Satisfaction Measures: These measures are now central to how councils are evaluated, highlighting the critical importance of engaging with residents and actively seeking their feedback. TSMs signify a shift in approach, recognising residents as active participants who help shape the services they receive rather than passive recipients.

Our local context and housing priorities

There are several local key strategies that have been considered during the development of this strategy. These set our priorities for housing, focusing our efforts to ensure that we:

- ensure the provision of good landlord services and that we continue to invest to meet housing needs
- ensure our tenants have more say in the way their homes and communities are managed, better support for tenants to sustain their properties and prevent homelessness
- build on the foundations of providing strong social connections, embrace diversity and deliver active community involvement, by promoting opportunities for better cohesion, tackle anti-social behaviour, domestic abuse by working jointly with our community partners



Collectively, these changes are designed to drive continuous improvement in social housing, holding the council as a landlord accountable for its performance and ensuring that the voices of residents remain at the heart of decision-making.

5. Involvement and Engagement – the challenges

Building trust and empowerment

We acknowledge that the relationship between the council as a landlord and residents goes beyond than just bricks and mortar. Building good communication, trust and being accountable are also key factors that need to be part of the resident/landlord relationship. Spurred not only by updated Social Housing regulatory changes, but also greater public scrutiny and rising resident expectations, earlier this year we embarked on a series of engagement events where a deeper conversation with residents emerged.

Over 400 residents participated and highlighted a series of issues they were encountering within their property, as well as issues within their neighbourhood.

At its core, it was acknowledged that these issues were not about any one specific problem but about the relationship between the council as a landlord and residents. Taking this on board, we have also considered our Tenant Satisfaction Survey told which told us that only 64% of tenants feel that the Council listens to their views and acts upon them.

From this, we are clear that we need to do better about reinforcing the fundamentals of what it means to be a good landlord and the value of *actively* listening to our residents.



What this means in practice is that we need to work at building and gaining our residents trust, understand their needs and empower them by better involving them in decisions that will impact on the quality of services they receive.

Overall, we understand that our residents want to be actively heard and in doing this we will be laying the groundwork for them to feel valued and empowered.

Our involvement and engagement work must also ensure it is embedded across service delivery. This not only also provides us with the opportunity to demonstrate that we are listening but to evidence that their voice helps to inform and shape delivery of services, that lead to outcomes that genuinely reflect their needs and priorities.

Understanding our residents

Meaningful involvement and engagement that truly reflects the diverse voices including those who are silent or under presented requires a good understanding of who our residents are.

Recognising this, last year, we embarked on a ***Knowing our residents*** programme which is helping us to gather data to better understand who our residents are, what their needs are and for some their vulnerabilities. We will use our intelligence and data to identify patterns that help prioritise service improvements so that residents can see that their input leads to tangible improvements and that their voice is heard.



Gaining a better understanding of our residents is and will continue to assist us in designing engagement opportunities that are accessible and inclusive for our different groups and residents' needs.

To facilitate this, we will continue with our efforts of exploring different involvement and engagement approaches that better meet residents' needs – such as more hybrid and in person meetings in community settings to maximise accessibility as this is what our residents have also told us that they want to see.

Taking on board the diversity, mobility limitations of some of our residents – we will work to better support them to engage and get involved in ways that better meets their needs, for example, removing language barriers by providing interpreting service where this is possible and holding meetings in locations where it better enables them to attend.

We will remain committed to responding to individual requirements and will plan to support residents' involvement whenever possible.

Understanding their priorities

In addition to the areas that residents told us were important to them, the series of engagement events provided us with a deeper understanding of what our residents expect from us as their landlord. These sessions allowed residents to share practical suggestions for improvement, focusing on how we can make involvement more accessible, inclusive, and, above all, genuinely meaningful.

Through these conversations, residents identified their top ten priorities. These priorities reflect both what matters most to them and the changes they believe will have the greatest positive impact:



We have considered our resident priorities and these form the cornerstone of this strategy and is guiding our actions and decisions as we move forward. The dialogue

and collaborative co-working with residents has been instrumental in shaping our approach.

Our dialogue with residents will continue ensuring that every household's unique perspective and lived experience is valued and considered as far as possible.

This commitment underpins our dedication to embedding resident involvement and engagement across all our services, ensuring that the voice of each resident is actively heard and influences the way we deliver landlord services.

6. Our plans for resetting involvement and engagement

To ensure that involvement and engagement with our residents is both meaningful and impactful, we are focusing on strengthening the foundations of our approach. We recognise the importance of building trust, understanding residents' needs, and empowering them by involving them more actively in decisions affecting the quality of services they receive.

This ongoing commitment will help us ensure that every resident's voice is heard, valued, and acted upon.

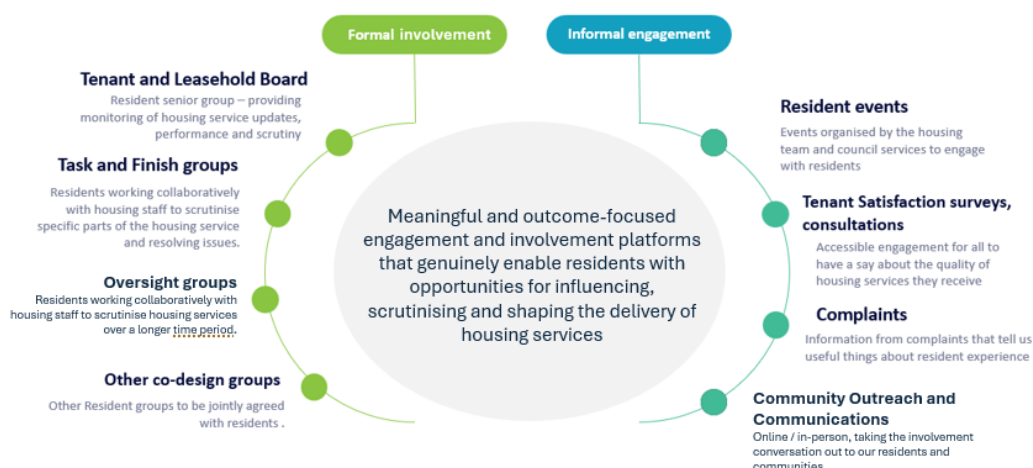
Our resident involvement and engagement offer

To deliver on our strategic objectives and realise our vision, we have actively worked alongside residents throughout the design process. Together, with our co-design group we have developed an indicative model of involvement and engagement that we will look to agree via the implementation of this strategy. The core aim is to provide a variety of platforms that can cater to the diverse needs and preferences of our residents.

This model encompasses both 'formal' council-wide structures and more 'informal' local, one-off opportunities. We expect that the formal mechanisms will enable residents to participate in structured, ongoing involvement at a city level, ensuring their voices contribute to major decisions and policy development. In contrast, informal opportunities are set out to be more accessible and flexible, allowing residents to engage on an ad hoc basis within their local communities when it suits them best.

By offering a range of engagement options, our approach ensures that all residents, regardless of their level of interest or availability, have meaningful opportunities to have their say and influence the services they receive. This dual approach underpins our commitment to fostering a genuinely inclusive and responsive resident involvement and engagement culture.

Our resident involvement and engagement offer



We expect that our strategic objectives and involvement/engagement offer combined, these will result in establishing solid foundations for residents to be more informed and involved, ensuring that service improvements are genuinely reflective of their priorities, and foster a culture of trust and collaboration. Ultimately, our aim is for every resident to feel their voice is heard and to see real, positive changes in the quality and responsiveness of the services they receive

Our vision

In moving forward with our strategy, we want to create a range of platforms, opportunities and choices for residents to get involved and engage. With the feedback we have gathered so far, we are in a better place to set our vision and strategic priorities that we will seek to deliver over the next three years. As we deliver this strategy – our conversation with our residents will also continue so we can work together ensuring that our involvement and engagement is effective and improvements are meaningful for our residents.

Our vision for our residents:

“We will work to enable every opportunity for residents to engage with us in ways that suit them, delivering meaningful and outcome-focused resident involvement where they can influence, scrutinise and shape the delivery of the services they receive”

Our vision encapsulates the work that has been done so far and more importantly it reflects what our residents have told us about the behaviours they expect from us and their service priorities. Within this, we have therefore set out our five priorities that signal our direction of travel for the next three years:



7. Delivering our priorities and action plan

To deliver our priorities and action plan, we will implement a series of tangible actions focused on making involvement and engagement accessible and impactful for all. These actions are specifically targeted at removing barriers to participation and maximising the impact of involvement and engagement across our services.

The priorities and action plan are included in **Appendix A** within this strategy - each take on board the feedback we have received from our residents and key stakeholders. By following this structured plan, we aim to embed resident involvement and engagement at the heart of our service delivery across services, ensuring that all voices are heard and that improvements are genuinely shaped by those who use our services.

Supporting our residents and staff to deliver



The journey towards resetting resident involvement and engagement has already begun, and this strategy sets out the programme of improvements that we intend to deliver. To deliver this strategy, we must also ensure that we have the right resources.

Our dedicated Resident Involvement Team will help to co-ordinate involvement and engagement activities and support service teams with practical support.

We will ensure that the team is supported and provided with the right tools, training and support to carry out their roles effectively. The team will also be responsible for working with resident groups to assess the success of this strategy. Where appropriate, the council will also consider the provision of other resources such as financial and all other associated costs to secure delivery of our objectives.




We also recognise that, to ensure meaningful and effective resident involvement, we will need to provide our residents with appropriate support.

This includes offering training opportunities specifically designed to equip them with the knowledge and skills required to carry out their representative and scrutiny roles effectively.




We are confident that by providing this support, we will empower our residents to participate confidently, ensuring that their contributions have a real impact on the decisions and improvements that affect their homes and local areas.

Assessing impact and delivery

To assess the positive impact of our resident involvement and engagement strategy, we will frame our evaluation the following actions:

-  We will track the outcomes of involvement and engagement activities against our strategic objectives, identifying areas where resident feedback has directly contributed to tangible improvements
-  We will track participation rates, monitor the diversity of those involved, and measure the extent to which resident input has influenced service delivery and decision-making processes.
-  We will regularly ask residents, staff, and others for their views and use insight data to help us understand what is working well and what could be improved

Monitoring and communicating our achievements

-  We will provide and publish the outcomes that this strategy is achieving for our residents and the positive outcomes it is delivering for them
-  We will demonstrate how we are actively working to ensure involvement and engagement and representation from our vulnerable and diverse resident groups
-  We will evidence the positive changes in service quality, resident satisfaction, and trust as a direct result of our involvement and engagement efforts.

In conclusion, we want to make sure residents are really involved in making decisions about their communities. By offering help and training, checking how well we are doing, and clearly sharing our results, we hope residents will feel welcome and confident to join us in this transformation journey.

Resident Involvement and Engagement Strategic Priorities

Action Plan

Priority 1: Establish and embed the right foundations and culture for meaningful resident involvement and engagement

| | Action | Key lead | By |
|----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|-----------------------|
| 1. | Deliver a member and cross-service internal training aimed at raising awareness of the updated regulatory framework in particular the requirements of the Transparency, Influence and Accountability consumer standard | Members, CLT, Housing | Q4 2025/26 |
| 2. | Develop and establish housing service policies, procedures that are accessible to residents and that they clearly reflect the service level offer that residents can expect and that have been subject to resident review | Housing, Cross services | Q2 2026/27 |
| 3. | Ensure Tenant Satisfaction Measures (TSMs) results are effectively captured and used to improve and help shape delivery of housing services and evidenced to residents | Housing, Cross services | From Q1 to Q4 2026/27 |
| 4. | Develop and agree a performance management framework that is shared with residents and clearly informs quality of delivery of services – including assurance on safety related matters | Housing/ – Cross Services | Q2 2026/27 |
| 5. | Develop and ensure that outcomes arising from the new Resident Involvement and Engagement strategy are shared and communicated internally | Housing/ – Cross services | From Q1 2026/27 |

| | | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|----------------------------------------|
| | to members, CLT and service managers and residents | | |
| Priority 2: Establish meaningful resident involvement and engagement platforms that are representative and inclusive of our resident community | | | |
| | Action | Key lead | By |
| 6. | Establish meaningful involvement and engagement platforms that enable residents to hold the council to account for the quality of services received, the performance and decisions made on their behalf | Housing/ Landlord Services and Residents | From Q42025/26 to Q2 2026/27 |
| 7. | Plan and provide training and support to residents to ensure they are equipped with the necessary skills and knowledge to effectively performance manage, scrutinise and contribute to the improvement and efficient delivery of housing services to residents | Housing/ Landlord Services and Residents | From Q4 2025/26 |
| 8. | Develop and establish an inclusive approach to ensure a better balance in opportunities, resources, and decision-making processes for the diverse resident community to build better relationships and collaboration | Housing/ Landlord services and Residents | From Q1 to Q3 2026/27 |
| 9. | Proactively encourage a diversity of views and experiences, across estates to understand variations and ensure that the voice of all residents is listened and acted on as far as possible | Housing/ Landlord Services and Residents | From Q4 2025/26 to Q3 2026/27 |
| 10. | Through Area Based working, provide support and sustainment to residents in need - to enable them to maintain their tenancies and foster an environment that reflects inclusivity and overall well-being of residents | Housing/ Landlord Services and Residents | Q4 2025/26 |

| | | | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------|-------------------|
| | | | |
| Priority 3: Develop our knowledge about our residents to deliver services that better meets their needs | | | |
| | Action | Key lead | By |
| 11. | Complete the “ <i>know your resident</i> ” project data and information gathering exercise to ensure a better understanding of residents’ profile and their diverse needs | Housing/ Landlord Services | Q1 2026/27 |
| 12. | Ensure all key resident touchpoints form part of wider resident data gathering to ensure that all groups have a fair access to housing and landlord services [e.g. Disability, ethnicity, language etc.] | Housing/ Landlord Services | Q4 2025/26 |
| 13. | Develop and establish a better, smarter, data focused approach to resident service improvement/design/delivery - using data as a key tool to deliver meaningful actions and better outcomes for residents | Housing/ Landlord Services | Q2 2026/27 |
| 14. | Internally build capacity to interpreting and utilising data, fostering a shared understanding of how resident data can inform strategic decisions for the benefit of the residents and their neighbourhoods | Corporate/ Housing/ Cross services | Q1 2026/27 |
| 15. | Better align property condition data with resident data [for e.g. those who live in homes with damp and mould, in need of adaptations] ensuring “ <i>those homes</i> ” are effectively linked, to enable better understanding and addressing inequalities | Housing/ Landlord Service and Property Services | Q4 2025/26 |
| Priority 4: Review and strengthen our communication with residents to foster respectful involvement and engagement that is inclusive and in ways that meets residents needs | | | |
| | Action | Key lead | By |

| | | | |
|-----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|--------------------|
| 16. | Review council housing website content with a view to ensure that the right and accessible information is available to residents and provide them with better quality information about their homes and their neighbourhoods | Housing/ Landlord Services | Q1 2026/27 |
| 17. | Further develop a range of communication channels for residents – e.g. phone calls, emails, text messages and social media to accommodate their different communication and engagement preferences as far as possible to gather their feedback | Housing/ Landlord Services | From Q1 2026/27 |
| 18. | Alongside residents, review existing communication channels for residents with a view to improving, modernising and exploring new channels that better meet residents' needs, and that makes information more accessible and engaging | Housing/ Landlord Services | Q1 2026/27 |
| 19. | Develop and publish a resident communication plan that seeks to build trust, transparency with residents and encourages them to proactively participate in improving housing service delivery and decisions -making processes | Housing/ Landlord Services | Q1 2026/27 |
| 20. | Embed proactive and transparent involvement and engagement by regularly updating residents on issues that matter to them including policy changes, changes in service delivery and related matters in order to build trust and awareness | Housing/ Landlord Services | Q1 2026/27 |

Priority 5: Deliver high quality landlord services to residents ensuring these exhibit the right behaviours and outcomes for residents

| | Action | Key lead | By |
|-----|-----------------------------------------------------------------------------------------|------------|---------------|
| 21. | Provide further assurance by establishing a resident complaint panel, that an effective | Corporate/ | Q1 2026/27 |

| | | | |
|------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|---------------------|
| | complaint handling process is provided that is compliant, accessible and that it embraces complaints as an opportunity to improve services for residents | Landlord Services | |
| 22. | Ensure compliance with landlord responsibilities for tenancy safety to assure tenants of their safety and that they have an opportunity to have a say on performance in this area | Housing/Property Services | Ongoing |
| 23. | Action the findings of the independent repairs review to ensure that residents receive an improved repairs service delivered by a skilled call centre service, and an improved reporting process and better insight of performance | Housing/Property Services | Q4 2025/26 |
| 24. | Put in place arrangements for proactive engagement with residents on the planning and decision making of investment plans that will impact on their homes and their neighbourhood | Housing/Property Services | All planning stages |
| 25. | In line with the landlord service re-organisation and Competency and Conduct Consumer Standard - ensure that Housing Officers receive training and skill-up to deliver good quality housing services and that they exhibit the necessary and right behaviours to tenants and leaseholders, and in due course, extend to the wider landlord function. | Housing/Landlord Services | From Q4 2025/26 |

Why do an Equalities Impact Assessment (EqIA)?

1. Equalities Impact Assessment (EqIA) is part of Oxford City Council's **Public Sector Equality Duty (PSED) (Equality Act 2010)**.

The General PSED enables Oxford City Council to:

- a. **identify and remove discrimination,**
 - b. **identify ways to advance equality of opportunity,**
 - c. **foster good relations.**
2. An EqIA must be done before making any decision(s) that may have an impact on people and/or services that people use and depend on.
 3. An EqIA form is one of many tools that can simplify and structure your equalities assessment.
 4. We are passionate about equalities, and we highly recommend that [Corporate Management Team \(CMT\) reports and all projects must attach an EqIA.](#)

Draft by Wendy Hind – Resident Involvement Officer
whind@oxford.gov.uk

A good EqIA has the following attributes:

1. **Comprehensively considers the [9 protected characteristics](#).**

| | |
|---------------------------------|--------------------------------------------------------------|
| 1. Age | 6. Race & Ethnicity |
| 2. Disability | 7. Religion or Belief |
| 3. Gender Reassignment | 8. Sex |
| 4. Marriage & Civil Partnership | 9. Sexual Orientation |
| 5. Pregnancy & Maternity | NEW- Socio-economic inequalities (voluntary adoption) |

2. It has **considered equality of treatment** towards service users, residents, employees, partners, council suppliers & contractors, and Council Members
3. Sufficiently considered **potential and real impact** of proposal or policy on service users, residents, employees, partners, council suppliers & contractors, and Council Members.
4. **Systematically recorded and reported** any potential and real impact of your proposal or policy on service users, residents, employees, partners, council suppliers & contractors, and Council Members
5. **Collected, recorded, & reported sufficient information and data** on how your policy or proposal will have an impact.
6. Offers **mitigations or adjustments** if a PSED has been impacted.
7. Provides clear **justifications** for your decisions.
8. It is written in **plain English** with simple short sentence structures.

Section 1: General overview of the activity under consideration

| | | | | | |
|------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|------------|-------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|
| 1. | Name of activity being assessed. For example: -New policy, -Review of existing policy, -Changes in service(s), -New project(s), etc. | This EIA forms part of the Resident Involvement and Engagement Strategy 2025 - 2028 | 2. | The implementation date of the activity under consideration: | 11 December (subject to Cabinet approval) |
| 3. | Directorate/Department(s): | Housing Services | 4. | Service Area(s): | Strategy and Performance |
| 5. | Who is (are) the assessment lead(s): Please provide: -Name -Email address | Pete Davies Interim Resident Involvement Lead pdavies@oxford.gov.uk | 6. | Contact details, in case there are queries: Please provide: -Name -Email address | Pete Davies PDavies@oxford.gov.uk |
| 7. | Is this a new or ongoing EqlA? | New <input checked="" type="checkbox"/> Extension to existing EqlA <input type="checkbox"/> | 8. | If this is an extension of a previous EqlA, please indicate where the previous EqlA is located and share the link to the said EqlA. | |
| 9. | Date this EqlA started: | 28 October 2025 | | | |
| 10. | Will this EqlA be attached to Corporate Management Team (CMT) reports/updates, which will be published online? | Yes, the EqlA will be presented alongside the RIE strategy to Corporate Leadership Team as it progresses to 10 December '25 Cabinet. | 11. | Give a date (tentative or otherwise) when this assessment will be taken to the CMT. | Following Director approval from w/s 10 November '25. |

Section 2: About the activity, change, or policy that is being assessed.

| | | | | | | | | | | |
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| 12. | Type of activity being considered: Check the most appropriate. | <input type="checkbox"/> Budget | | <input type="checkbox"/> Decommissioning | | <input type="checkbox"/> Commissioning | | <input type="checkbox"/> Change to an existing activity. | | |
| | | New Activity - Resident Involvement and Engagement Team Strategy from 2025 – 2028. | | | | <input type="checkbox"/> Others. Please specify: | | | | |
| 13. | Which priority area(s) within Oxford City Council's Corporate strategy (2024-2028) does this activity fulfil? | <input checked="" type="checkbox"/> Good, affordable homes | | <input type="checkbox"/> Strong, fair economy | | <input checked="" type="checkbox"/> Thriving Communities | | <input type="checkbox"/> Zero Carbon Oxford | | <input checked="" type="checkbox"/> Well run council |
| | | | | | | | | | | |
| 14. | Which priority area(s) within Oxford City Council's Equality, Diversity & Inclusion Strategy (2022) does this activity fulfil? | Responsive services and customer care. | | <input type="checkbox"/> Diverse and engaged workforce. | | <input checked="" type="checkbox"/> Leadership & organisational commitment. | | <input checked="" type="checkbox"/> Understanding and working with our communities. | | |
| | | | | | | | | | | |

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| <p>15. Outline the aims, objectives, & priorities of the activity being considered.</p> | <p>The strategy aims to reset relationships with residents by embedding meaningful engagement, improving service delivery, fostering trust and transparency. It is built on four principles:</p> <ul style="list-style-type: none"> • Delivering the promise to reset involvement, engagement and resident relationships • Actively listen to our residents • Respond to residents' priorities and their concerns. • Embed meaningful and effective involvement and engagement across our organisation. <p>The EIA ambition is threaded through the document from the outset: -</p> <hr/> <p><i>We will work to enable every opportunity for residents to engage with us in ways that suit them, delivering meaningful and outcome-focused resident involvement where they can influence, scrutinise and shape the delivery of the services they receive”.</i></p> <hr/> |
| <p>16. Please outline the consequences of not implementing this activity.</p> <p>For example, -Existing activity does not fulfil Corporate Objectives, -existing activity is discriminatory and not fulfilling Council's PSSED, ... to name a few.</p> | <p>There is no option for doing nothing. The delivery of the proposed Resident Involvement & Engagement Strategy and associated regulatory compliance programme is the Resident Involvement teams primary work programme over the next 3 years.</p> <p>Failure to comply with this EIA for the Resident Involvement and Engagement Strategy would have the following consequences:</p> <ul style="list-style-type: none"> • Lack of credibility for OCC in involving and engaging with residents. • Reputational damage and failure to complete key strategic objectives. • Legal failure to comply with Public Sector Equality Duty/Equalities Act 2010 - this document will need online publication. • Subject Access Requests/FOI to review how the strategy was consulted on. • Legal Challenges. • Challenge from the Regulator for Social Housing and non-compliance reportedEvidence of direct and indirect discriminatory behaviour within OCC. |

Section 3: Understanding service users, residents, staff and any other impacted parties.

| | |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>17. Have you undertaken any consultations in the form of surveys, interviews, and/or focus groups?</p> <p>Please provide details— -when, -how many, and -the approach taken.</p> | <p>The resident involvement and engagement strategy has undergone the following consultations:</p> <p>12 months review, design and build consultations, desktop reviews of best practice from other councils.</p> <p>Discussion with involvement groups and communities on what matters to them.</p> <p>Reviewing the 2024 Tenant Satisfaction Measures feedback, complaints information</p> <p>Tenant Engagement Roadshow was held during January 2025 to understand resident priorities.</p> <p>Online draft Resident Involvement Strategy consultation with residents.</p> <p>Online launch of Resident Involvement Offer hosted by Director of Housing and Exec Member for Housing & Communities inviting resident feedback.</p> <p>Open forum facilitated by our Housing & Tenant Consultant online to discuss what matters to them.</p> <p>Feedback received from and recommendations made by the Co-Design Group (CDG), our pre-cursor to the full Tenant and Leaseholder Board. They final strategy document will be shared with the CDG for info on 20 November.</p> <p>Internal staff conversations across Housing and Community Service directorates.</p> <p>The strategy was signed off by the Housing Director Friday 24th October.</p> |
| <p>18. List information and data used to understand who your residents are and how they will be affected.</p> | <p>We continue to build data information via our QL system and communication understanding from monthly Power - Bi reports on who contacts us the most. The “Know your Tenants” programme of work is ongoing.</p> <p>The Resident Involvement team engagement plan is to segment communities, understanding and appreciating the intersectionality within those residents. This knowledge is central with approx. 24,000 residents encourage trust and confidence from.</p> <p>The strategy has been designed around 5 key principles: -</p> <ol style="list-style-type: none"> 1. Establishing foundations for involvement and engagement 2. Enhancing resident knowledge to improve service delivery 3. Co-designing inclusive involvement and engagement platforms |

| | | |
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| | | <p>4. Improving communication for respectful, inclusive involvement and engagement</p> <p>5. Delivering high-quality landlord services aligned with resident expectations.</p> <p>It is key therefore that our online data is correct and individualised to achieve these principles. That information can only be identified through effective and respectful communication, which requires flexibility of approach and styles.</p> <p>The strategy affects every one of our residents and is designed with EI principles in mind.</p> |
| 19. | <p>If you have not done any consultations or collected data & information, are you planning to do so in the future?</p> | <p>There will be an annual appraisal of the RI strategy and action plan. This EI Assessment will be reviewed at the same time.</p> <p>Future additional consultation will occur once the Tenant and Leaseholder Board (TLB) is in place, with the first meeting due to go live in Q4 25/26. The TLB recruitment campaign was launched on 27 October 2025.</p> <p>The Tenant and Leaseholder Board has an ongoing function to review and scrutinise as it will be responsible for monitoring the successful action plan which sits in the appendix of the Resident Involvement strategy.</p> <p>The management of Equality and Inclusion principles has been fully future proofed.</p> |

Section 4: Impact analysis.


| | | | | | |
|-----|-------------------------------|----------------------------------|-----------------------------------------|----------------------------------------|-------------------------------------|
| 20. | Who does the activity affect? | Service Users | Yes <input checked="" type="checkbox"/> | No <input type="checkbox"/> | Don't Know <input type="checkbox"/> |
| | | Members of staff | Yes <input checked="" type="checkbox"/> | No <input type="checkbox"/> | Don't Know <input type="checkbox"/> |
| | | General public | Yes <input type="checkbox"/> | No <input checked="" type="checkbox"/> | Don't Know <input type="checkbox"/> |
| | | Partner / Community Organisation | Yes <input checked="" type="checkbox"/> | No <input type="checkbox"/> | Don't Know <input type="checkbox"/> |

Check as needed.

The impact may be positive,

| | | | | | |
|--|----------------------|-----------------------------------|-----------------------------------------|-----------------------------|-------------------------------------|
| | negative or unknown. | City Councillors | Yes <input checked="" type="checkbox"/> | No <input type="checkbox"/> | Don't Know <input type="checkbox"/> |
| | | | Yes <input checked="" type="checkbox"/> | No <input type="checkbox"/> | Don't Know <input type="checkbox"/> |
| | | Council suppliers and contractors | Yes <input checked="" type="checkbox"/> | No <input type="checkbox"/> | Don't Know <input type="checkbox"/> |

| 21. | Does the activity affect positively or negatively on any protected characteristics as stated within Equality (Act 2010)? | | | | | |
|---------------------------------------|--------------------------------------------------------------------------------------------------------------------------|----------|--------------------------|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Protected Characteristic | Positive | Negative | Neutral | Don't know | Data/information/evidence supporting your assessment | Analysis & insight Mitigations |
| 345 Age | Y | | <input type="checkbox"/> | <input type="checkbox"/> | <p>Approx. 50% of our residents are 55 or over.</p> <p>The aim of the strategy is ensuring their views and concerns are taken into full consideration.</p> <p>Designing engagement and involvement opportunities will take all represented groups into consideration and will allow for support, advice and training in an increasingly digitalised world.</p> | <p>Training, laptops and support around going online will be an ongoing engagement theme.</p> <p>There will also be opportunities to support younger adults taking on their first tenancy.</p> <p>Formal and informal communication options will form part of our engagement menu and is embedded in the strategy document.</p> |
| Disability (Visible and Invisible) | Y | | <input type="checkbox"/> | <input type="checkbox"/> | <p>Disability awareness includes behaviour and emotional (neurotypical) challenges, hearing, memory or ability to concentrate, mobility and gross motor skills,</p> | <p>A plain English strategy will need to be designed, plus an easy read version and summaries for translation options.</p> |

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| | | | | | <p>dyslexia, wheelchair users and travel costs, speech difficulties and learning impairments, sight impairments.</p> | <p>The choice of this being in Braille will need exploring.</p> <p>Currently this group is assessed as being around 5% of our total resident population. It is acknowledged this is under-reported.</p> <p>More work is recommended to fully understand the range of disabilities we are supporting, or need to consider, in our policy reviews.</p> <p>The strategy is inclusive in tone, language and intent.</p> |
| <p>Gender Re-assignment</p> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <p>www.oxford.gov.uk</p>  | <p>The strategy encourages awareness of all groups and all individuals.</p> <p>The strategy adoption will enhance and increase staff and resident awareness and understanding of our resident base. Currently this group is not segmented and unknown as a percentage.</p> <p>The aim is with confidence, and trust, will come knowledge and enabling.</p> <p>As the aim of gender reassignment is not to be known, we would not and should not seek this out.</p> | |

| | | | | | | |
|-------------------------------------------|--------------------------|-------------------------------------|--------------------------|-------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Marriage & Civil Partnership | | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | The strategy is inclusive in tone, language and intent. |
| Race, Ethnicity and/or Citizenship | Y | | <input type="checkbox"/> | <input type="checkbox"/> | 40% of our resident population are registered as Black Asian or Irish | <p>The strategy positively states the requirement to work with all minority groups.</p> <p>The strategy was designed working alongside the Citizen and Community team and specifically aims to improve our understanding of all community groups.</p> |
| Pregnancy & Maternity | | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | The strategy is inclusive in tone, language and intent. |
| Religion or Belief | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <p>Percentages and diversity of faiths not represented in statistics in the strategy.</p> <p>This is a potential area of risk.</p> <p>It is recommended we review our knowledge of resident faith diversity in more detail.</p> | The strategy is inclusive in tone, language and intent |
| Sex | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | No known adverse effects anticipated – be aware of the numbers and maintain an equal division as much as possible on the board of men and women. | The strategy is inclusive in tone, language and intent. |







| | | | | | | |
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| Sexual Orientation | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | | The strategy is inclusive in tone, language and intent. |
| Socio-economic inequalities such as: - income and factors that impact income. -access to jobs This was voluntarily adopted by Oxford City Council on the 13th of March 2024. | <input checked="" type="checkbox"/> | | <input type="checkbox"/> | <input type="checkbox"/> | | The strategy looks to address this area in more detail and much of the stated aims of the strategy will positively support improved access for these citizen groups into discussions around how the RIES team works and how policies are drafted. This sector has previously been overlooked and further work on this area is recommended. |
| 348 | | | | |  | |

Section 5: Conclusion(s) of your Full Impact Assessment

22. Conclusions.

Having read the strategy alongside drafting this EI review, this strategy is well designed with under-represented groups within Oxford City tenant base front and centre of the proposals.

The intended and recommended systemic changes will be a positive step forward for inclusion, representing transparent, professional City Council Resident Involvement plans.

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|------------|--------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|
| | <input type="checkbox"/> Stop and reconsider the activity. | <input type="checkbox"/> Adjust activity before beginning the activity and continue to monitor. | <input checked="" type="checkbox"/> No major change(s) or adjustments and continue with activity but continue to monitor. | <input type="checkbox"/> No major change(s) or adjustments and continue with the activity. No need to monitor in the future. |
| 23. | Please explain how you have reached your conclusions above. | <p>The strategy places EI principles front and centre in its aims and outcomes. The priorities recommended show a clear commitment to improving OCC inclusive approach to policy, Resident Involvement team procedures and Housing Service team working behaviours.</p> <div data-bbox="689 518 1966 965">  <div> <div>  <p>Priority 1 Establish and embed the right foundations and culture for meaningful resident engagement and involvement</p> </div> <div>  <p>Priority 2 Establish meaningful resident involvement and engagement platforms that are representative and inclusive of our resident community</p> </div> <div>  <p>Priority 3 Develop our knowledge about our residents to deliver services that better meets their needs</p> </div> <div>  <p>Priority 4 Review and strengthen our communication with residents to foster respectful engagement that is inclusive and in ways that meets residents needs</p> </div> <div>  <p>Priority 5 Deliver high quality landlord services to tenants ensuring these exhibit the right behaviours and outcomes for residents</p> </div> </div> </div> <p>There are 5 recommended actions: -</p> <ol style="list-style-type: none"> 1: Design a plain English version of the strategy. 2: Design an easy read version of the strategy for intellectual impairments (aka learning disabled). 3: Offer strategy summaries in key alternative languages on request. 4: Make available hard copies of the strategy on request. 5: Improve our understanding and knowledge of faiths and religious diversity within our resident group. | | |

Section 6: Monitoring and review plan.

The responsibility for monitoring arrangement of the EqlA action plan lies with the service/team completing the EqlA. These arrangements must be built into the performance management framework such as KPIs or Risk Registers.

| | | |
|-----|------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 24. | Who or which team or service area will be responsible for monitoring equalities impact? | The responsibility for reviewing, publishing, updating and maintaining this EI Assessment sits with the Resident Involvement Team |
| 25. | Who (individual, team, or service area) will be responsible for carrying out the EqlA review? | The Resident Involvement Team will be responsible for the review, updates and presenting for sign off as appropriate. |
| 26. | How often will the equality impact be reviewed for this activity? | <div data-bbox="613 914 927 1019">Review 1: Following cabinet Approval Dec 2025.</div> <div data-bbox="613 1062 864 1094">Review 2: Q3 '26</div> <div data-bbox="613 1137 864 1169">Review 3: Q3 '27</div> <div data-bbox="1010 914 1518 986">27. Date when the EqlA will be reviewed again.</div> <div data-bbox="1592 914 1798 946">December '25</div> |

Section 7: Sign-off

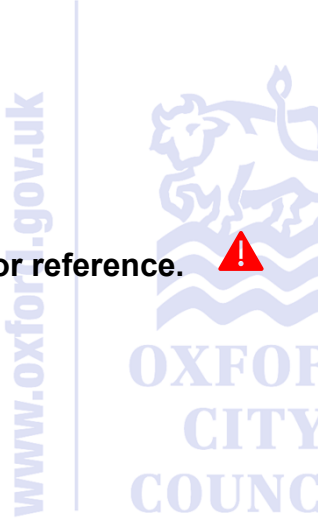
| | | | |
|-------------------------------------------------|---------------------|----------------------|----------------------|
| Name: Peter Davies | Name: | Name: | Name: Full Name |
| Job Title: Interim Resident Involvement Manager | Job Title | Job Title: Type here | Job Title: Type here |
| Signature: Pete Davies | Signature: ----- | Signature: ----- | Signature: ----- |

Date: 27/10/2025

You have now reached the end of the assessment.

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Please append this to any reports and project files for reference.



Suggested list of people to include are:

- 1) Project lead/manager.
- 2) Head of service area or team.
- 3) Person who completed the EqlA.
- 4) EDI Led.
- 5) EDI Specialist.
- 6) For joint projects, please consider the following:
 - 1. Other project leads
 - 2. Other service area and/or team lead/managers.

This is not an exhaustive list.

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Risk Register

Resident Involvement Strategy

As at: 06/11/25

| | | | | | | | | | Gross | | Current | | | Target | | | | | | | |
|-----|-------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------|-------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|----------------|-------------|-------------|-------|---|---------|---|-------|--------|---|---------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|---------------|------------|--------------|
| Ref | Title | Risk Description | Opp / Threat | Cause | Consequence | Risk Treatment | Date Raised | Owner | P | I | P | I | Score | P | I | Comments | Control / Mitigation Description | Date Due | Action Status | % Progress | Action Owner |
| 1 | Regulatory Compliance | Failure to deliver the outcomes from the strategy would be a breach of the Regulator of Social Housing's Consumer Standards, compliance with which are now a statutory requirement of landlords. | Threat | Inadequate governance or monitoring arrangements; delays in implementing action plan | Regulatory intervention, reputational harm, potential financial penalties, reputational risk | Reduce | 06/11/25 | Pete Davies | 4 | 4 | 3 | 3 | 9 | 2 | 2 | TLAB members being recruited to through an application basis. | Establish governance framework and the Tenant & Leaseholder Board (TLAB) by Q4 2025/26; regular reporting against the action plan to Housing Board and TLAB | 01/02/26 | In Progress | 10% | Pete Davies |
| 2 | Low Resident Engagement | Failure to achieve meaningful resident involvement in strategy implementation. | Threat | Limited awareness, digital exclusion, language barriers, or lack of trust in landlord services. | Lack of trust from residents; strategy objectives not met; poor compliance with regulatory standards; reputational damage. | Reduce | 06/11/25 | Pete Davies | 3 | 3 | 2 | 2 | 4 | 2 | 2 | The strategy and EQIA includes a detailed delivery plan | Deliver targeted communications (plain English, easy-read, translated versions); provide digital inclusion support (training, devices); use mixed engagement channels (online, in-person, community events); complete "Knowing Our Residents" programme to tailor engagement. | 01/02/26 | In Progress | 50% | Pete Davies |

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To: Cabinet
Date: 10th December 2025
Report of: Nigel Kennedy Group Finance Director
Title of Report: Commercial Procurement Strategy 2026-2029

| Summary and recommendations | |
|------------------------------|-------------------------------------------------------------------------------------------------|
| Decision being taken: | To seek approval to a three-year Procurement Strategy for the Council |
| Key decision: | No |
| Cabinet Member: | Councillor Ed Turner, Deputy Leader (Statutory) and Councillor for Finance and Asset Management |
| Corporate Priority: | All |
| Policy Framework: | Corporate Plan |

| Recommendation(s): That Cabinet resolves to: | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|
| <ol style="list-style-type: none"> Consider the draft Procurement Strategy 2026-2029 (at appendix 1); and Recommend to Council that the draft Procurement Strategy be adopted. | |
| Information Exempt From Publication | |
| None | |

| Appendix No. | Appendix Title | Exempt from Publication |
|-------------------|------------------------------------------------|-------------------------|
| Appendix 1 | Draft Corporate Procurement Strategy 2026-2029 | No |
| Appendix 2 | | |

Introduction and background

- The current procurement strategy ended in October 2025.

2. A new three-year corporate procurement strategy (the strategy) is recommended to be in place until 2029, a year after the corporate priorities are due to be reviewed. This will allow a new strategy to be developed in-line with any updated corporate priorities in 2029.
3. A range of internal stakeholders have been engaged in formulation of the strategy and any feedback received has, where practical to do so, been incorporated into this draft.
4. The Strategy is designed to align with the Procurement Act 2023, National Procurement Policy Statement (NPPS) and any procurement Policy Notices (PPN's) along with the Public Procurement Act 2015 (under which a number of old Contracts are still governed) and the Councils Constitution (Section 19).

Key changes from the 2022-2025 strategy

5. The only key change from the previous strategy is linked to how the Council has and will continue to manage and implement the Procurement Act 2023 and new transparency requirements introduced in February 2025, as well as taking into account the content of Council motions so far as possible.

Salient Points of the Strategy

6. The Strategy has links to documents relating to certain areas such as;
 - a. Public expenditure statistical analysis
 - b. National Procurement Policy Statement
 - c. Common areas of spend definitions.

Other implications

7. There are no known implications.

Financial implications

8. Whilst there are no direct financial implications arising from the agreement of the Strategy, clearly the absence of an agreed strategy could lead to increased costs being incurred by the Council or indeed missed opportunities.
9. It is vital that the wholly owned companies (ODSL, ODSTL, OCHL, OCHDL) work with the Council in relation to procurement to ensure that there is not a duplication of the tendering process and awarding of contracts offering the same goods, services or works potentially disaggregating spend and diluting the financial savings arising from Group buying power.
10. It is also important that all the Councils companies are considered in all procurements and named to co-use the contracts where it is deemed practical to do so reducing on costs and hopefully driving more value for money for all the council owned companies.

Legal issues

11. Under Part 4.4 (14) of the Constitution Cabinet is empowered to consider the recommendations in this report.
12. Procurement operates in a highly regulated environment governed by the Council's internal procedures and Constitution and legislation. Adopting an up-to-date

procurement strategy will assist the Council comply with the relevant legislative framework.

Level of risk

13. There are no known risks.

Equalities impact

14. The Procurement Strategy is an important lever for Oxford City Council to narrow inequalities within Oxford, and the delivery of social value also helps achieve that aim. Equalities in procurement are considered in as part of the new Procurement Strategy.

Carbon and Environmental Considerations

15. There is no known Environmental Risk

Council Motion related to ethical trade

16. There was a Council motion in 2025 related to ethical trade where the cabinet member for finance was requested to bring forward costed policies that incorporate wherever possible and in line with applicable legislation, the UN Principles for Responsible Investment (UN PRI) and Guiding Principles on Business and Human Rights (UNGPR); and that explicitly preclude Council knowingly, indirectly or directly, investing in or trading with entities implicated in the following, henceforth referred to as “the proscribed activities”:

- fossil fuel extraction, processing, or trade;
- state violence and repression, war and occupation comprising grave violations of human rights as defined in international law (including war crimes, crimes against humanity, and genocide);
- the production of weapons, weapon parts, or military equipment where there is risk of the above violations being committed.

17. The above will be addressed during the period of this strategy as set out below

- By incorporating into the Conditions of Participation a self-declaration asking suppliers to confirm that they are not involved in any of the activities listed. The Council would have to accept the suppliers answer to the question
- By building into the terms and conditions of contract a clause that allows the Council to terminate a contract should the Council identify at any time during the life of the Contract that the supplier is engaged in any of the mentioned activities

Conclusion

18. The Strategy does not replace any Council internal rules (Constitution section 19) or external rules (Regulations). It enhances and provides guidance and support for internal stakeholders and sets out how procurement will support the Council priorities.

| | |
|----------------------|-----------------|
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|--------------------------------|--|
| Background Papers: None | |
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Oxford City Council

Corporate Procurement Strategy 2026 - 2029



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¹ [Public Expenditure Statistical Analysis 2025](#)

² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)

COMMERCIAL PROCUREMENT STRATEGY 2026- 2029

1. BACKGROUND

Welcome to the 3rd iteration of the Corporate Procurement Strategy designed to set out the proposed actions for the coming 3 years.

This Procurement Strategy has been prepared following the introduction and commencement of the new Procurement Act 2023 in February 2025. It is mindful of the current financial climate, and the proposed changes under Local Government Reorganisation (LGR).

Whilst this strategy sets out the aims and goals for the January 2026 - December 2028 period it will be reviewed on an annual basis, to reflect any changes in both national and local policies and priorities. The following points are relevant to this strategy.

- £341 billion was spent through public procurement in 2023/24 (latest figures from the House of Commons Library). This figure has risen annually and procurement accounts for about a third of public sector spending. Gross spending on public sector procurement was £434 billion in 2024/25 across the UK with the biggest increase in the health sector ¹
- Most procurement spending falls under the category 'purchases of goods and services'
- The Council has around 750 live contracts and spends circa £220M per annum on procuring goods, services and works including Capital, or £130M excluding Capital.
- This Procurement Strategy has been designed to align the Council's values and priorities along with the procurement strategies of the Council's wholly owned companies to ensure that the group benefit from both financial savings and efficiencies from joint procurements and frameworks wherever possible
- Procurement will work with all of the Council service areas, its wholly owned companies within the Group (Oxford Direct Services Limited (ODSL), Oxford Direct Services Trading Limited (ODSTL), Oxford City Housing Limited (OCHL) and Oxford City Housing Development Limited (OCHDL) trading as OxPlace to understand the environment it is working within and the impact to the entity or service area to enable effective planning of how procurement can support.
- This procurement Strategy has also been designed to align with the requirements under the Procurement Act 2023, notably to incorporate the National Procurement Policy Statement² (NPPS) into the procurement processes where relevant.
- This Procurement Strategy supports a culture of devolved procurement within the constraints of the Public Procurement Regulations and the Councils' Constitution.
- This strategy further embeds the council's commitment to Community Wealth Building, delivering Social Value through procurement and strengthening Contract management that began with the previous strategy.
- As part of the Councils sustainability goals, this strategy looks to further integrate environmental, social, and ethical considerations into purchasing decisions to create long-term value for the Council and society. This means looking beyond just cost and quality to consider the entire lifecycle of a product or service, including its environmental impact, fair labour practices and contribution to goals like waste reduction and carbon emission cuts.

2. SETTING THE SCENE FOR PROCUREMENT

¹ [Public Expenditure Statistical Analysis 2025](#)

² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)

COMMERCIAL PROCUREMENT STRATEGY 2026- 2029

2.1 OVERVIEW

Procurement is the process through which an organisation establishes contracts for goods, works, services and utilities.

The Procurement Team within the Financial Services Directorate at the Council has oversight of only a small part of the Council's total budget and cannot manage all day-to-day dealings between the Council and its suppliers. Therefore, the whole Council needs to have an awareness of procurement best practice and their role in deploying them.

Public procurement is governed by a legal and regulatory framework which is aimed at promoting economic competition. Failure to adhere to public procurement law can expose the Council to costly legal challenges. In that context this strategy is intended to support compliance with the Council's Contract procedure Rules (the Constitution), the UK Public Contracts Regulations 2015, the Procurement Act 2023 and the fundamental procurement principles of transparency, equal treatment, non-discrimination and mutual recognition.

Procurement starts with an identified need, and seeks to put in place a contract, or contracts which effectively meet that need. This involves proactive engagement with stakeholders reviewing the procurement pipeline, spending plans and procurement options, the formal award of contracts and the management and monitoring of contracts that are already in place.

Procurement will continue to support this by providing full visibility to internal and external stakeholders and suppliers by:

- The monitoring of Small Medium Size Enterprises (SME's) and Local spend i.e. suppliers with an OX postcode;
- Responding to requests for new supplier set ups (when a supplier has been awarded a contract) within 7 days (in conjunction with the Payments Team);
- The publishing of transparency reports quarterly on the Council's website;
- The publishing of the Council's contracts on the Council website containing contract expiration dates;
- The running of open, fair and transparent tender processes within Regulation guidelines;
- Supporting Suppliers by holding "How to Tender" workshops
- Supporting Suppliers by holding "Meet the Buyer" events
- Supporting service areas with the appointment of commercial Business Partners who attend service area meetings when the focus will be on the procurement pipeline and supplier performance.
- Providing further expert advice and assistance for the procurement process including contract monitoring, contract management training, and training in other aspects of procurement

3. SETTING THE DIRECTION FOR PROCUREMENT

3.1 OUR PURPOSE

Procurement is an essential business function encompassing a range of activities enabling the Council to obtain goods, works, services or utilities delivering value for money compliantly. This is achieved through leadership of procurement for the Council, ownership and accountability for the sourcing process,

¹ [Public Expenditure Statistical Analysis 2025](#)

² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)

COMMERCIAL PROCUREMENT STRATEGY 2026- 2029

communication of purpose, process and outcomes and working in collaboration with Council entities, external authorities and or buying organisations. To achieve this a Procurement Board was set up in September 2024 and meets on a monthly basis ensuring the council is up to date with any changes in the Regulations, the Constitution and anything else that may impact the delivery of Value for Money.

The Procurement Team consist of 6 professionals with MCIPS qualification or working towards MCIPS, all with a vast amount of experience and knowledge.

The team, in June 2025 moved to a commercial Business Partnering approach to procurement which is a strategic role to act as a bridge between the Councils service areas and the procurement function, contributing to the overall strategic direction of the Council.

The contract register which records Government Commercial standard categorisation is split into 14 categories, with the main spend from the top 25 contracts aligned to Regeneration and Economy, Information Technology, Construction and Communities and Citizens.

Although our primary purpose is to ensure that the Council has the appropriate contractual provision to allow the delivery of its core functions there are a number of activities which the procurement team lead on and are intrinsic to the success of our Strategy:

- Management of the procurement Register and Pipeline
- Contract monitoring
- Contract Procedure Rules
- Standardised Documentation
- Supplier Engagement
- Procurement Training
- Procurement Processes, Systems and Integration
- Commercialisation and Income Generation
- Social Value

The level of data we record and monitor is used to evidence that our actions and impacts are supportive of our Local and National Drivers.

The Council is mindful that the impact of procurement is far greater than processes objectives and principles and that effective procurement can incorporate a wide-ranging socio-economic agenda. The Council is committed to applying the approaches and lessons of the Community Wealth Building movement (a partnership initiative that aims to redirect economic power into the hands of communities in Oxford, by supporting locally led, community-owned enterprises and including them in the infrastructure and purchasing frameworks of larger institutions)– where local institutions use their assets, spending power and influence to build a truly inclusive and generative local economy. That means at the heart of this strategy sits the aim to deliver an inclusive economy, whereby the Council uses its purchasing power to retain wealth that benefits the local economy, influences sectors to provide an Oxford Living Wage and unleashes the potential of the voluntary and third sector. In taking this approach, the Council will not only deliver a successful local economy for everyone, but by leveraging our power can help address a wide range of ethnic and social disparities, push employers to become inclusive, significantly contribute to our ambition to be zero carbon and deliver value for money for Oxford's citizens.

3.2 AMBITION

¹ [Public Expenditure Statistical Analysis 2025](#)

² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)

COMMERCIAL PROCUREMENT STRATEGY 2026- 2029

To be a highly effective customer focused team with processes and systems in place to ensure the timely award of fit for purpose contracts minimising the risk to the Council of challenge, reducing costs and increasing quality whilst supporting localisation and the delivery of social value specifically to Oxford. To apply innovation to streamline the procure to pay process to decrease procurement cycle time, decrease the complexity of the process and increase efficiency.

3.3 VISION

The Procurement Strategy plays an indirect role in support of the Council's five key priorities (Good, affordable homes, Strong, fair economy, Thriving communities, Zero carbon Oxford and A well run council) by adding value to all procurements for our stakeholders through strategic thinking, efficient process integration, and exceptional customer care and by offering our services outside of the Council where practical to do so promoting the long term interests of the communities we represent.

4. OUR AIMS, OBJECTIVES AND KEY PRIORITIES

4.1 AIMS

Procurement commits to the following to support the delivery of the Corporate Priorities:

- To increase spend with Small and Medium sized Enterprises (SME's), Local (OX Postcodes) and VCSE's (Voluntary, Community and Social Enterprise) Organisations. The Government within the National Procurement Policy Statement has set out a requirement to drive economic growth and the strengthening of supply chains giving small and medium sized enterprises and voluntary, community and social enterprises a fair chance at public contracts, and have stated that all central government departments must set a 3 year target for direct spend with SME's (from 1st April 2025) and a two year target for direct spend with VCSEs (From 1st April 2026). In-line with this, procurement will identify VCSE suppliers in Oxford and ascertain before April 2026 those that the Council currently engage with in order to baseline and set a target of spend with VCSE's from April 2026 onwards.
- To increase understanding of and to deliver the benefits of Social Value and Community Wealth Building;
- To support Equality Diversity and Inclusion by embedding principles in the procurement process;
- To support Sustainable requirements in the procurement process using the Sustainability Impact Assessment;
- To treat suppliers and customers with respect and courtesy, and respond to their needs with a sense of urgency;
- To encourage suppliers to implement the Oxford Living Wage and or Living Wage Foundation Rate;
 - Procurement will seek to promote and increase the number of suppliers that adopt the Oxford Living wage or Living Wage Foundation rate on supply of services or works by incorporating the requirement into both tender documents and terms and conditions;
- Work with all the council entities and other authorities across Oxfordshire;
- Promote opportunities for local businesses either directly with the Council or indirectly through contracts that it holds with prime contractors;
- Utilise the procurement portal to support the reserving (not direct award) of below threshold SME, VCSE and local contracts (set up a database of local suppliers that could be approached to tender for below threshold requirements). This will still need to be in-line with the requirements of the Councils Constitution, the achievement of value for money and the use of good commercial judgement.
- Ensure the Council delivers on the procurement of ethical and sustainable goods / services and works;
- Embed net zero in procurement;
 - Procurement will ensure that where practical to do so, climate change adaptations will be incorporated into major projects at all stages of the procurement exercise;

¹ [Public Expenditure Statistical Analysis 2025](#)

² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)

COMMERCIAL PROCUREMENT STRATEGY 2026- 2029

- Promote “Selling to the Council” on its website [About Selling to the Council | Oxford City Council](#) and by the holding of annual Meet the Buyer Events.

In the above context, delivery of the Council’s priorities, including better outcomes from public services and regeneration of places, requires resourcefulness and Procurement is responding to this requirement by maximising value for money – gaining further social value benefits, supporting stakeholders in the use of frameworks and other procurement portals like the digital marketplace where value for money can be demonstrated. It will create commercial opportunities – promoting revenue generation through promotion and support of the Council’s two wholly owned companies. It will also support smarter ways of working – embracing innovation, collaboration and embedding change.

4.2 OBJECTIVES

Procurement is a continuously evolving area and with the recent implementation of the Procurement Act 2023, significant budgetary constraints and the Local Government Reorganisation it is important that procurement not only delivers fit for purpose goods, works, services and or Utilities, but also ensures that it is innovative, agile and delivers on value for money.

The overarching objective is to achieve the best commercial results, whilst supporting key social outcomes that meet Oxford’s needs strategically; creating opportunities for local people, and encouraging spend with local SMEs, social enterprises, co-operatives and voluntary bodies and organisations committed to environmental improvement by:

Considering throughout the commissioning cycle what community benefits can be derived through social value, and where building provisions for such in all our contracts is beneficial;

Incorporating social and environmental aspects into specifications award criteria and contract conditions where appropriate and proportionate to what is being procured or provided;

Promoting innovation, employment and social inclusion, protection of the environment, energy efficiency and combating climate change; and

Creating and nurturing a vibrant, healthy, innovative, competitive rich and representative diverse marketplace of suppliers reflecting Oxford localities that include and encourage small business, mutual, charities, community groups, co- operatives and social enterprises;

Varying the extent to which social value might be measured by the Council. Some contracts will be well placed to deliver greater social value in the communities they serve than others.

The Council is committed to sustainable procurement and its procurement activities are not solely based on the economic factors but aim to achieve the best value based on the whole life costs, the associated risks, measures of success and implications for the society and environment.

Procurement is focused on developing its approach to how it assesses, manages and monitors the use of community benefits in its contracts to ensure the additional benefits offered by the Council’s suppliers will deliver the best possible social value for the communities of Oxford City.

Further details can be found on the “Selling to the Council” web pages. [Supplier's Guide – Oxford City Council](#)

4.3 KEY PRIORITIES

¹ [Public Expenditure Statistical Analysis 2025](#)

² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)

COMMERCIAL PROCUREMENT STRATEGY 2026- 2029

The Group Finance Director (Section 151 Officer) and the Strategic Procurement Manager will be responsible for the delivery of the Key Priorities as detailed below and captured in an Action Tracker at appendix 2.

- Social value and climate change
 - Re-tendering during the period of this Strategy the Procurement portal
 - Collaborative procurement
 - Yearly Constitutional review
 - Template document review (as and when required)
 - Further embed the new procurement regulations
 - Commercial focus
 - Contract Management
 - Improve procurement skills throughout the Council
 - Maintenance of the Contract Register
 - Transparency reporting
- Ensuring Equality and Diversity, Sustainability and other factors are considered in the procurement process where relevant to do so.

5. MEASURING AND MONITORING OUR PERFORMANCE

Procurement monitors key indicators linked to its activity which are tracked over a Financial Year.

5.1 SPEND

The tables below detail spend for the council, OCHL, ODSL and ODSTL for the last 4 financial years (includes grant payments).

| 2021/22 | External Supplier Spend £ | Inter-OCC Company Spend £ | Business Grants | Total Spend £ |
|-----------------|---------------------------|---------------------------|-------------------|--------------------|
| Council Revenue | 31,499,484 | 36,948,453 | 16,628,603 | 85,076,540 |
| Council Capital | 62,269,858 | 8,576,557 | | 70,846,414 |
| ODSL | 7,629,735 | 4,473,456 | | 12,103,191 |
| ODSTL | 1,213,044 | 191,131 | | 1,404,175 |
| OCHL | 14,359,303 | 781,111 | | 15,140,414 |
| Total | 116,971,423 | 50,970,707 | 16,628,603 | 184,570,734 |
| Notes: | | | | |

| 2022/23 | External Supplier Spend £ | Inter-OCC Company Spend £ | Business Grants | Total Spend £ |
|-----------------|---------------------------|---------------------------|-----------------|---------------|
| Council Revenue | 25,644,117 | 42,801,680 | 3,158,725 | 71,604,522 |
| Council Capital | 49,792,217 | 26,497,563 | | 76,289,781 |
| ODSL | 25,836,188 | 2,867,197 | | 28,703,386 |

¹ [Public Expenditure Statistical Analysis 2025](#)

² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)

COMMERCIAL PROCUREMENT STRATEGY 2026- 2029

| | | | | |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------|------------------------|----------------------|
| ODSTL | 3,342,073 | 10,174,883 | | 13,516,956 |
| OCHL | 14,586,290 | 585,457 | | 15,171,747 |
| Total | 119,200,886 | 82,926,780 | 3,158,725 | 205,286,391 |
| Notes: | | | | |
| 2023/24 | External Supplier Spend £ | Inter-OCC Company Spend £ | Business Grants | Total Spend £ |
| Council Revenue | 26,570,866 | 47,564,736 | 4,705,171 | 78,840,773 |
| Council Capital | 26,301,075 | 24,686,734 | | 50,987,810 |
| ODSL | 23,016,928 | 4,612,284 | | 27,629,212 |
| ODSTL | 4,955,345 | 7,706,870 | | 12,662,215 |
| OCHL | 3,928,351 | 1,804,185 | | 5,732,536 |
| Total | 84,772,565 | 86,374,808 | 4,705,171 | 175,852,544 |
| Notes: | | | | |
| 2024/25 | External Supplier Spend £ | Inter-OCC Company Spend £ | Business Grants | Total Spend £ |
| Council Revenue | 37,660,159 | 48,363,878 | 4,876,012 | 90,900,048 |
| Council Capital | 64,637,991 | 81,461,435 | | 146,099,426 |
| ODSL | 31,278,981 | 6,437,290 | | 37,716,271 |
| ODSTL | 6,700,245 | 8,044,913 | | 14,745,158 |
| OCHL | 11,842,481 | 427,240 | | 12,269,721 |
| Total | 152,119,857 | 144,734,755 | 4,876,012 | 301,730,624 |
| Notes: | Council Revenue – increase in part from Temporary Accommodation Council Capital – £59.81M intercompany spend is the purchase of properties from the housing company ODSL – Sub-contractor spend increased by £7M year on year OCHL - £7.91M Old Marston Paddock development (Building contract Payments) | | | |

5.2 LOCAL (OX POSTCODE) AND SME (SMALL/MEDIUM ENTERPRISE) SPEND

SME Spend

The following charts illustrate the council's performance on the utilisation of both local and SME suppliers. The Council do not monitor spend with VCSE's currently. That is in the pipeline for April 2026.

The Council, whilst not required to, has set an annual target of 45% (2024 onwards) of spend to be with SME's.

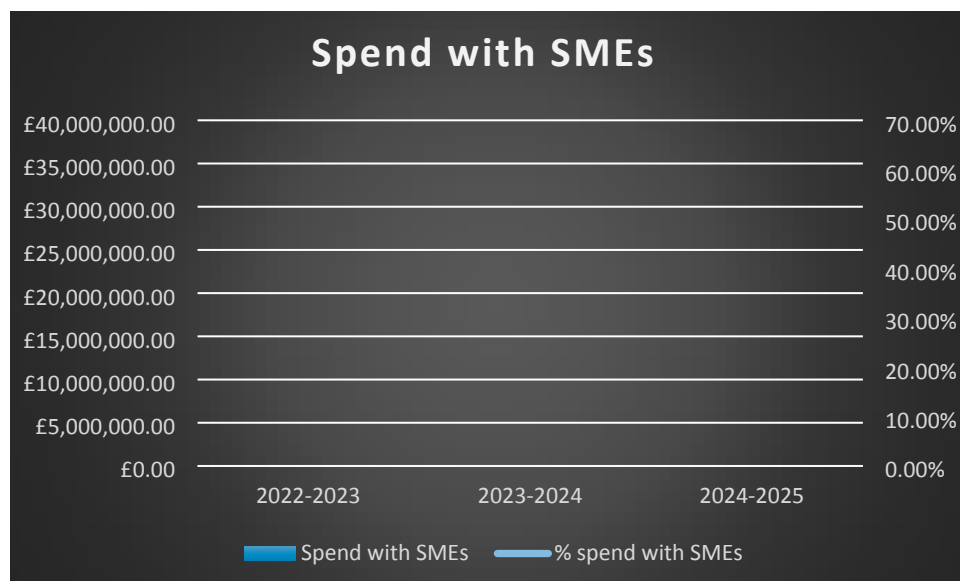
¹ [Public Expenditure Statistical Analysis 2025](#)

² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)

COMMERCIAL PROCUREMENT STRATEGY 2026- 2029

A large proportion of the Council spend is with ODSL. ODSL are not classed as an SME although indirectly ODSL may use suppliers classed as SME's or VCSE's.



The council has exceeded its SME spend target consistently throughout the last strategic period and continues to do so.

SME spend has increased in 2024 – 2025 although the percentage of spend figure has fallen, mainly due to an increase in payments made to major projects including Hill Residential Limited and Network Rail Infrastructure. These 2 organisations alone represent a £5M increase in non-SME spend for 2024/25 impacting on the SME%

The two suppliers detailed above may use local suppliers (indirect SME spend), but this is not tracked.

An additional £1.5M was spent with Zurich Municipal (non-SME) in 2024-25 compared to previous years further impacting on the SME%

The provision of additional work to ODSL, who are not classed as an SME also impacts on the councils SME spend percentage.

Altogether from the top 15 suppliers by spend £10M more was spent in 2024/25 causing the reduction in the SME % spend.

Local Spend

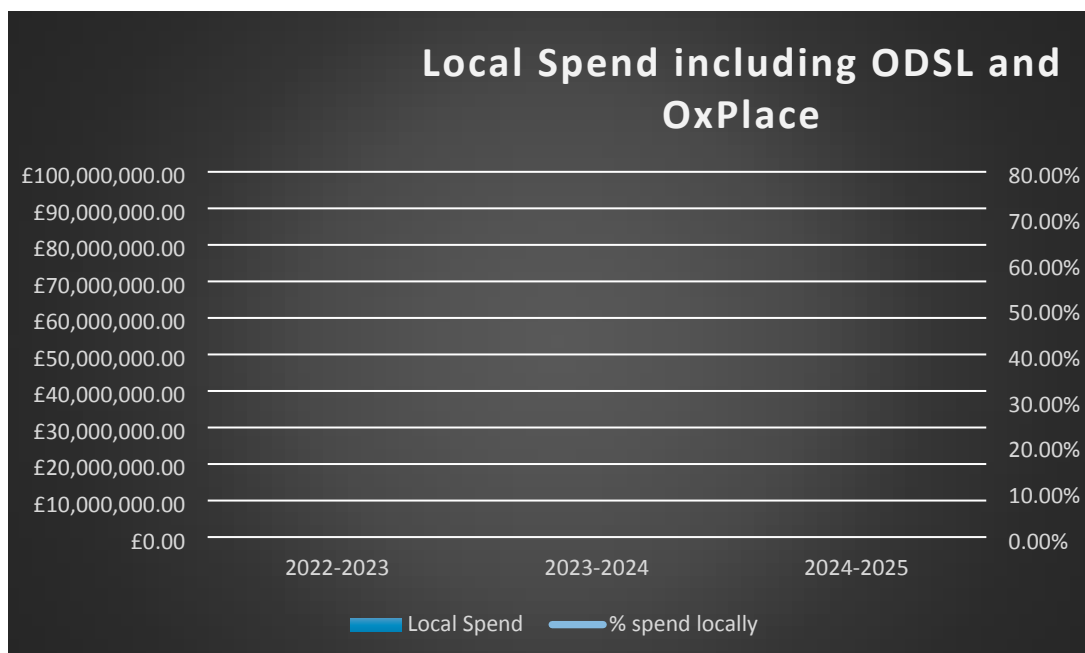
The Council, whilst not required to, has set an annual target of 70% of spend (2024 onwards) to be with local suppliers (Ox Post code).

The Council as part of the Constitution requires that one quotation should be sought from a local supplier when more than one quotation is necessary for a purchase of goods, works or services.

¹ [Public Expenditure Statistical Analysis 2025](#)

² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)



The councils spend with local suppliers has increased year on year and whilst it is accepted that the % of local spend has reduced, as detailed within the SME spend section the use of large contractors where large payments are being made will impact on the overall percentage.

We do ask that on large contracts a supplier uses local supply chains where possible, however the council does not track this indirect local spend.

Reed Specialist Recruitment and Easy Hotel are local suppliers, but they are not classed as local suppliers due to their registered address not being in Oxford i.e. an OX postcode. In 2024-25 there has been a significant increase in the use of agencies such as Reed. This is just a small example of the impact of the suppliers registered office can have on the percentage of local spend.

The use of Frameworks is increasing, and this has and will have an impact on the use of local suppliers.

5.3 CONTRACT REGISTER_PIPELINE

The Contract register and Pipeline is managed daily by the Procurement team providing visibility to enable effective management and proactive engagement with stakeholders on contracts.

With the commencement of the Procurement Act 2023 (PPA 2023), the procurement team are having to capture and record additional information on the Contract register to enable it to satisfy the requirements of the PPA 2023.

Procurement is required to capture contracts with a value in excess of £30,000 including VAT on the contract register. This value was increased from £10,000 in November 2024 in line with the procurement Act and the Constitution.

August 2025 – Categories of Spend

¹ [Public Expenditure Statistical Analysis 2025](#)

² [National Procurement Policy Statement - GOV.UK](#)

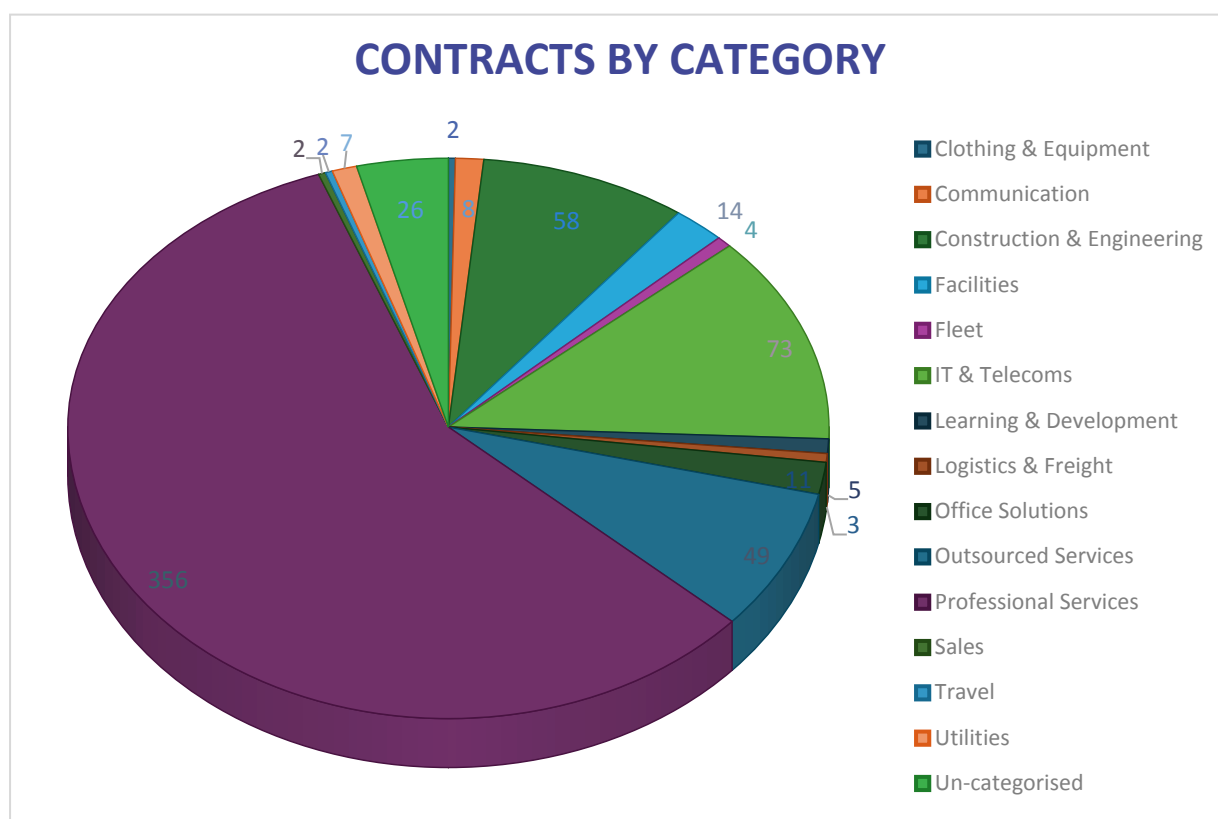
³ [Common Areas of Spend definitions - Procurement](#)

COMMERCIAL PROCUREMENT STRATEGY 2026- 2029

The high-level Categories (Common Areas of Spend (CAS) ³ used for the Contract Register are those set by the Government. The latest version of CAS has some new Categories that over time the procurement team will incorporate into the register.

As shown in the chart below, Professional Services is the highest category area and includes contracts for application support, Quantity Surveyors and other types of surveyors, survey initiative, engineering frameworks, energy quality assurance. subscriptions, temporary labour, architects, project managers, commercial agents, auditors, valuations and so on. IT and telecoms are the second highest category followed by construction and engineering and outsourced services.

When the team start to look at the updated CAS a number of contracts assigned to professional services will be re-aligned to other categories.



August 2025 Contracts by Service Area

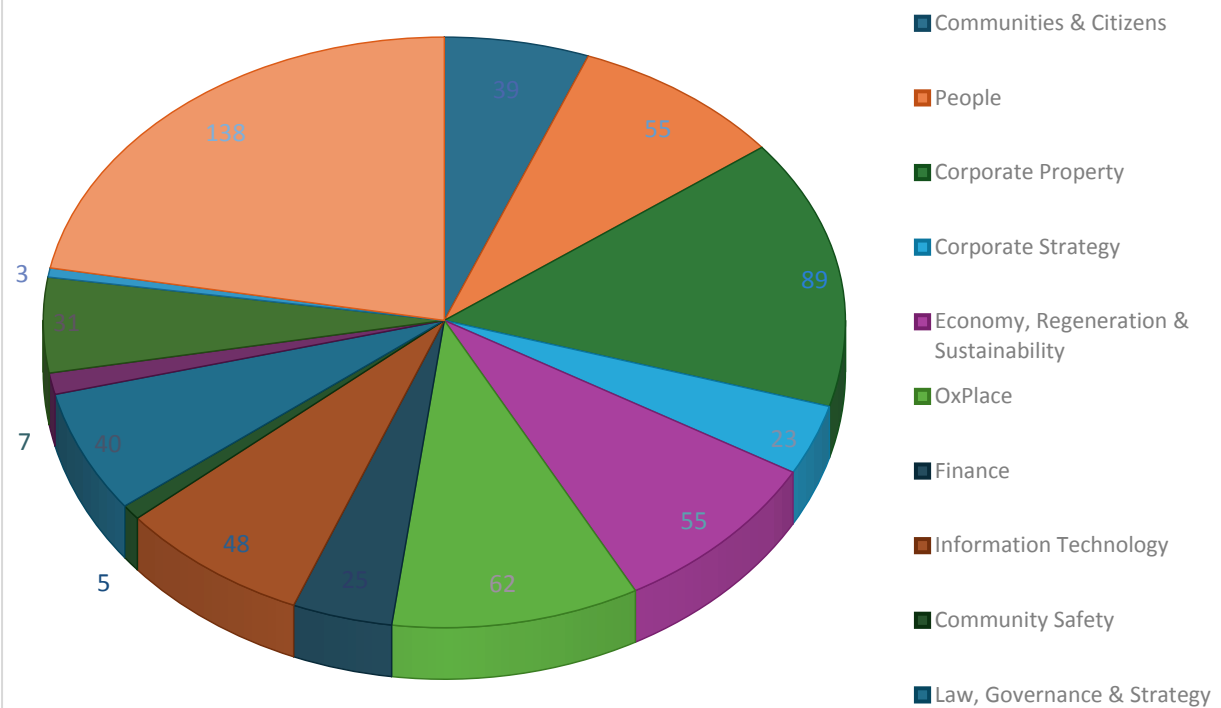
Housing Services has the highest number of live contracts at the Council with 138 followed by corporate property with 89 and OxPlace with 62. This chart does not demonstrate the value of the contracts, purely the number of live contracts at the point of running the report.

¹ [Public Expenditure Statistical Analysis 2025](#)

² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)

CONTRACTS BY SERVICE AREA



August 2025 Contracts by published value by service area

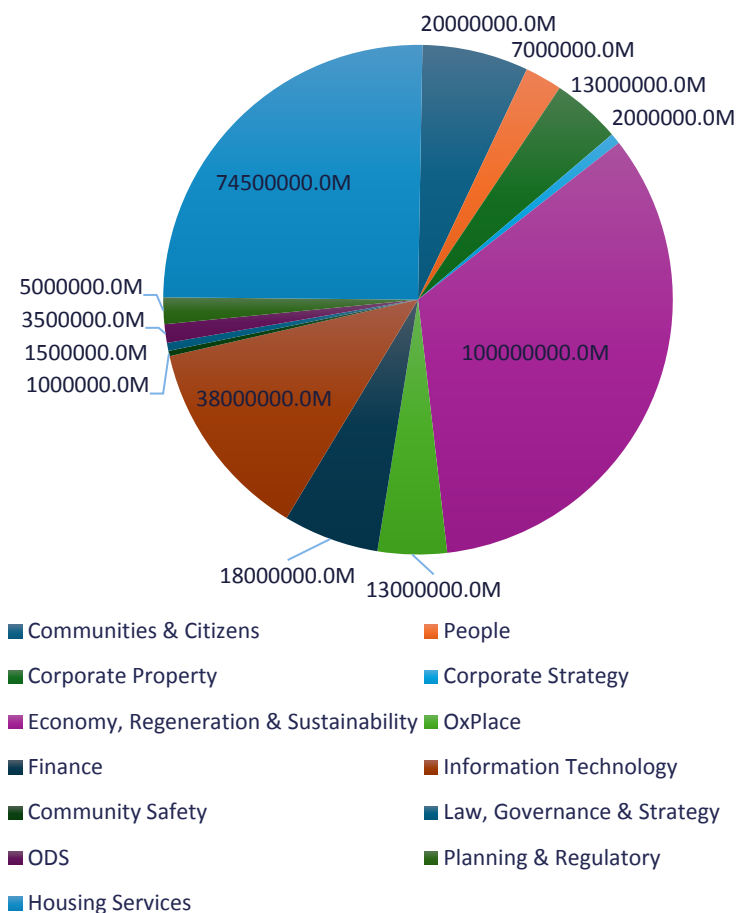
Whilst Housing Services has the highest number of actual contracts followed by Corporate Property and OxPlace, when we look at the published contract value (the initial contract award value), it is Economy, Regeneration & Sustainability that has the highest contract value followed by Housing Services and Information Technology

¹ [Public Expenditure Statistical Analysis 2025](#)

² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)

Contract Value by Service Area



5.4 EXEMPTION REQUESTS

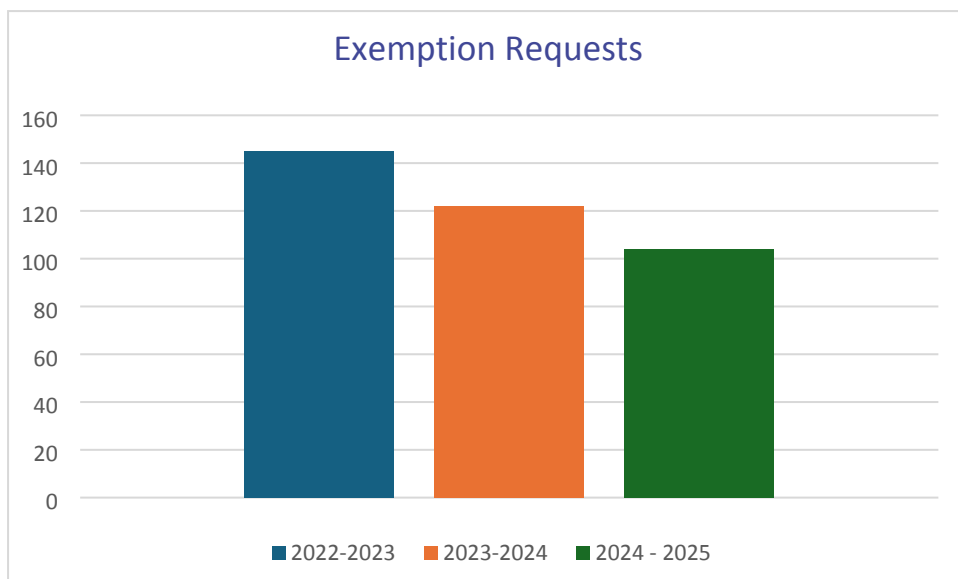
Officers are able to request exemptions from following the procurement process in a limited number of instances including emergencies and when no competitive market exists (sole supplier). Such requests require authorisation by the Service Director, Deputy Chief Executive or Cabinet and where such exemptions are in excess of £100,000 in conjunction with Director of Law and Governance & Strategy.

The chart below indicates the number of exemptions over the last 3 years. Procurement have worked with service areas to reduce the number of requests over the years, helping service areas become more pro-active in their contract management in an effort to drive more value for money.

¹ [Public Expenditure Statistical Analysis 2025](#)

² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)



5.5 TENDERS UNDERTAKEN VIA THE PROCUREMENT PORTAL

Procurement monitors the number and type of procurements run on the Procurement Portal. There are competitions undertaken outside of the portal which cannot be tracked due to the devolved nature of the council procurement structure. Those undertaken outside of the portal are generally call offs from a framework utilising the buying organisations systems, or low value below £30,000 where only one quote is required. Following proactive training by the Procurement Team on the use of the corporate procurement portal the number of recorded procurements undertaken via the portal increased in 2024 and to date in 2025 (October 2025) 158 procurements have been run through the portal.

| Competition Type | 2022 | 2023 | 2024 | 2025 to date |
|-----------------------------------|------------|------------|------------|--------------|
| Closed - Invitation only | 209 | 92 | 231 | 114 |
| Open Tenders | 13 | 38 | 30 | 15 |
| Restricted tenders | 2 | 1 | 4 | 1 |
| Unspecified (Framework Mini Comp) | 6 | 72 | 63 | 27 |
| Direct Award | 0 | 0 | 1 | 1 |
| | | | | |
| Year Total (Jan - Dec) | 230 | 203 | 329 | 158 |

There continues to be a Regulatory requirement under the Procurement Act 2023 for electronic tendering and within the Constitution it sets out the requirement to administer quotations and tenders through the Councils portal to ensure uniformity of documentation, template terms and conditions and notifications to the required publications such as Find a Tender Service (FTS) (Contract Finder replacement).

The Portal Contract is due to be tendered during the life of this strategy. Once the new contract is awarded, its use will be further rolled out to potentially encompass on-line evaluation and contract management models.

¹ [Public Expenditure Statistical Analysis 2025](#)

² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)

COMMERCIAL PROCUREMENT STRATEGY 2026- 2029

5.6 TRANSPARENCY REPORTING

As well as measuring and monitoring the above performance measures, procurement will publish transparency reports in line with the Procurement Regulations this includes but is not limited to:

- Councils Contract register (a redacted version, providing only required data)
 - [Council contracts | Oxford City Council](#)
- Expenditure Data on items over £500 and Government Procurement Card Transactions. This is a Regulatory requirement as set out in the Local Authorities (Data Transparency) Code 2015, requiring local authorities in England to publish information relating to expenditure over £500
 - [Our spending data | Oxford City Council](#)
- Under the new Procurement Act 2023 there will be an increase in transparency reporting including, but not limited to:
 - Key Performance Indicators (KPIs) for all contracts above £5M
 - Publishing contracts (redacted sensitive data) for all contracts above £5M
 - Payment Compliance Notice (which is likely to replace the payment chart below)
 - Payment Notices for payments over £30,000
 - 17 Procurement Notices ranging from a pipeline notice (expected value of contracts exceeding £2M) to Termination notices even for contracts with a natural expiration date.
- Procurement engages with the payments team to publish the Percentage of undisputed invoices paid within 30 days of receipt.

| | 2022_23 | 2023_24 | 2024_25 |
|--------------------------------|---------|---------|---------|
| Paid within 30 days of receipt | 76,787 | 71,301 | 66,845 |
| Total no of invoices | 85,682 | 95,945 | 83,100 |
| Percentage paid within 30 days | 89.62 | 74.31 | 80.44 |
| | | | |

- The council is tracking below its target of 95%. The procurement and payment team are working with finance to increase Agresso and procure to pay training.
- Issues identified within this area are failure to complete Goods Receipting (GRN), not setting out of office notifications (causes delays), invoices sent outside of the system not being sent to the payments team in a timely manner, purchase orders not being raised prior to invoice receipt, notification of invoice disputes and officers not acting promptly.

6. CONTRACT MANAGEMENT

The process of managing agreements from their creation through to their execution by the chosen party, and to the eventual termination of the contract.

With the Procurement Act in force, the level of required transparency and a need to effectively manage and monitor contractual performance (managing time, maximising value, mitigating risk, fostering strong supplier relationships), training in contract management for around 75 buyers across the Council was fulfilled between September and December 2024.

It is the intention of the procurement team to undertake further contract management training for all new potential buyers into the Council by running a monthly training course. This will include refresher training for those that need it.

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² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)

COMMERCIAL PROCUREMENT STRATEGY 2026- 2029

Procurement has a number of tools to support the contract management lifecycle which will be continuously reviewed and updated, but includes

- Effectively defining the contract's purpose, deliverables and performance expectation
- Evaluation and Selection training
- Work with legal to support proper contract drafting
- Effective use of Key Performance Indicators and Service Levels.
- Risk management tools
- Ensuring that contracts are reviewed and or renewed or terminated in a timely manner using the contract register and pipeline.

With the introduction of the Business Partnering Model, the procurement team will provide more hands-on support to service areas as and when required.

7. SOCIAL VALUE

The Public Services (Social Value) Act 2012 which came into force on 31st January 2013 applies when a procuring authority in England procures the provision of services, or the provision of services together with the purchase or hire of goods or carrying out of works, that was subject to Part 2 of the Public Contracts Regulations 2015. Under the Procurement Act 2023, primarily within the National Procurement Policy Statement there is a requirement on commissioners to consider the economic, environmental and social benefits of their approaches to procurement.

Social value can be defined as the additional benefit to the community from a procurement process over and above the direct purchasing of services and or works.

Adopting social value, economic and environmental factors alongside the typical price and quality considerations into procurement processes and procedures, increase the potential for sustainability in a contract.

The Council requires quotes and tenders to include a minimum 10% social value weighting where proportionate and relevant. Where a supplier proposes to deliver social value as part of a contract, the Council must ensure those commitments are adhered to using suitable KPIs. Procurement will work with commissioning officers and contract managers throughout the procurement lifecycle to incorporate social value completely in the process. In the last 3 years of the previous procurement strategy there had been success, but monitoring and measuring of results has been difficult. In this new strategic period, procurement intends to further increase the commitment and monitoring of social value by the following

- **Continued Support of the Oxford Living Wage**
 - The Council incorporates the Oxford Living Wage or National Living Wage Foundation rate into its standard template documents ensuring that local suppliers pay a fair wage to employees. The Council cannot legally enforce this; however, it is taken into consideration when reviewing the tenderers submitted costs.
- **Using the Procurement Business Partners to help record deliverables against social value contractual commitments**
 - Business Partners will support service areas with their contract management and ensure that social value is part of contract management meeting agendas and that the results are logged centrally with procurement.
- **Publication to the internet and intranet by January 2026 of an updated local version of the National TOM's (a range of social value themes, outcomes and measures aligned with the Councils 5 priorities).**

¹ [Public Expenditure Statistical Analysis 2025](#)

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³ [Common Areas of Spend definitions - Procurement](#)

COMMERCIAL PROCUREMENT STRATEGY 2026- 2029

- **Meet the Buyer event in February 2026**
 - At each Meet the Buyer event the Council offers guidance on Social Value. There will be a social value forum at the 2026 Meet the Buyer event.
- **How to Tender workshops**
 - The procurement team host “How to Tender” workshops to support suppliers in the procurement process. This includes how a local supplier might be able to add value to its bid by the incorporation of social value.
- **Match my Project**
 - For the last year the Council has published within its tender documents a link to a platform called “Match my Project”. The portal use has increased its reach in 2025 to incorporate all of the Oxfordshire Councils.
 - The platform allows communities / schools etc to request support for a project / requirement, and for suppliers to commit to the project/requirement. This means that the social value deliverable is more meaningful and can be tracked.
- **National Procurement Policy Statement**
 - Under the Procurement Act 2023 the Council when procuring above threshold works or services must consider how it can remove barriers to VCSE and SME engagement; how it can encourage local suppliers.
 - Tenders are to be evaluated by MAT (Most Advantageous Tender) which means that cost is not necessarily the prevailing priority for tenders and that Social and environmental considerations can play a more important role.

The Council’s commitment to Community Wealth Building and economic inclusion also recognises the social value inherent in spending money within the local economy and through socially purposeful organisations. The council encourages procuring officers to use legally compliant processes to open tender opportunities for local SMEs, and VCSE organisations (such as reserve contracts and direct awards for lower value contracts) where it is possible to demonstrate that value for money and quality thresholds can be met.

In the period 1st April 2025 to 31st August 2025 there were 97 contracts set up. Only eighteen contracts were above the procurement threshold at which social value is applicable and 4 of these related to products to which social value did not apply. Of the remaining 14 contracts:

Eight were awarded to a local supplier (including ODS) which provides social value as a basic, money spent with those suppliers should be invested back into the local economy.

One contract was under a framework where social value is not always generated.

Five contracts have social value, the value of which is difficult to ascertain.

The opportunity is provided to winning bidders to register with the portal, Match my Project to identify where best they can support the communities in Oxford. Detailed below are the delivered projects to date in 2025

| Month | Hours Value* | Resources | Cash Donations | Total Value Monthly |
|----------|--------------|-----------|----------------|---------------------|
| January | £0 | £0 | £0 | £0 |
| February | £0 | £0 | £0 | £0 |
| March | £0 | £0 | £0 | £0 |
| April | £0 | £0 | £0 | £0 |
| May | £0 | £0 | £0 | £0 |
| June | £0 | £0 | £0 | £0 |
| July | £135.44 | £200.00 | £0 | £335.44 |
| August | £0 | £0 | £0 | |

¹ [Public Expenditure Statistical Analysis 2025](#)

² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)

COMMERCIAL PROCUREMENT STRATEGY 2026- 2029

| | | | | |
|-----------|---------|----------|----|----------|
| September | £592.55 | £4900.00 | £0 | £5492.55 |
| Total | £727.99 | £5100.00 | £0 | £5827.99 |

- Based on the National TOMs (Theses, Outcomes and Measures) framework values each volunteer hour at £16.93

As well as the above through the Match my Project portal the following commitments have also been made

- Health and safety training for VCSE's
- Employment opportunities
- Work placements
- 18 hours supporting unemployed people into work
- Delivering career talks to schools and colleges within Oxford
- Using 100% public transport for face-to-face meetings
- Volunteering allowances to be used to support local initiatives
- Development of waste reduction strategies for projects in Oxford
- Internship/gap year placement
- Work with Aspire
- Job skills training for rehabilitating your offenders
- Donation of Kit
- Sponsorship of sports organisations
- Workplace safari

Social value may also be delivered in sub-threshold procurements for the provision of services and the procurement team has recently updated the contract set up form for all contracts with a value exceeding £30,000 asking the requester to provide information to the procurement team in terms of whether social value is included. It is hoped that this will provide greater visibility moving forward.

This is still a manual area of data collection and reliant on the individual contract managers, managing their contracts effectively to ensure that the social value commitments are delivered.

8. SUSTAINABLE PROCUREMENT

Sustainable procurement is the act of adopting social, economic and environmental factors alongside the usual price and quality consideration by the organisation handling the procurement process and procedures. The approach seeks to ensure that the organisation meets their need for goods, services, works and utilities in a way that achieves value for money on a whole life basis in terms of generation benefits not only to the organisation but also to society and the economy whilst minimising damage to the environment.

A sustainable Procurement Guide has been developed with the Sustainability team which incorporates what sustainable procurement is, why it matters, consideration in the procurement process, a checklist of considerations and how to manage sustainability post award of Contract. The Council also has a Carbon and Environmental Considerations in Projects and Programmes guidance for Project Designers.

For all procurements with an estimated contract value in excess of £5m it is recommended that we incorporate within the tender documents a range of questions related to carbon reduction including.

- Carbon reduction plan
- Steps being taken to reduce GHG Emissions
- Net zero target date
- Emission declaration.

¹ [Public Expenditure Statistical Analysis 2025](#)

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With the Council's drive towards a zero carbon Oxford this should also be considered in contracts with a lower value where relevant.

9. ETHICAL PROCUREMENT

Ethical procurement refers to the consideration of a wide range of issues relating to the ethical and sustainability goals of an organisation. It ensures that suppliers and the organisations in their supply chains are monitored on a regular basis to assess whether workers' rights and labour conditions conform to the International Labour Organisation core conventions. Ethical procurement should ensure that there is no disadvantage to those working or living on or near a supply site and that the price paid for the product/service or works reflects a fair and equitable market value.

The Government under the Procurement Act 2023 has developed a Central Digital Platform to enable it to register excluded or excludable suppliers. If a supplier is excluded for any reason, which could include illegal supply chain practices, bribery, coercion and intimidation, extortion etc, the Council must not use that supplier. If the supplier is excludable then the Council must assess the risk of using that supplier before making its final decision.

The Council has an [EDI Strategy](#) which provides a framework for buyers to consider how its supply chain initiatives meet equality criteria as enshrined in the Equality Act 2010 and the Oxford City Council EDI Strategy.

Buyers need to undertake an equality impact assessment as part of the procurement process and procurement support the EDI policy by including it in template tender documents:

Modern Slavery Act 2015

The modern slavery regulations came into force on 29 October 2015. The Modern Slavery Act requires businesses in the UK to prepare a slavery and human trafficking statement for each financial year. The requirement to prepare a slavery and human trafficking statement applies to commercial organisations with an annual turnover – or group turnover - of at least £36 million. Organisations have to be transparent about what they are doing to tackle modern slavery, not just within their own operations, but in their supply chains as well.

The Council supports the Act by ensuring that suppliers tendering for contracts disclose whether the Modern Slavery Act 2015 is applicable in terms of compliance with annual reporting. If applicable, Modern Slavery statements are checked and logged on the contracts register.

Fair Tax

The Council has signed up to Fair Tax Principles. While there are limits to our power, we will do what we can and will also support the Fair Tax Foundation to lobby for more powers around procurement. At the moment we can exclude suppliers who have been proven to have had tax offences, but we are prevented from specifying 'responsible tax' as a contract award criterion, e.g., a policy shunning the artificial use of tax havens, as 'tax' cannot be linked straightforwardly to the subject matter of a contract.

Signing up to the fair tax principles means that we support the proper accounting for and payment of tax and specifically for:

- Ensuring IR35 is implemented robustly, and a fair share of employment taxes are paid by contractors.

¹ [Public Expenditure Statistical Analysis 2025](#)

² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)

- Shunning the use of offshore vehicles for the purchase of land and property, especially where this leads to reduced payments of stamp duty.
- Undertaking due diligence to ensure that not-for-profit structures are not being used inappropriately by suppliers as an artificial device to reduce the payment of tax and business rates.
- Demanding clarity on the ultimate beneficial ownership of suppliers, be they UK based or overseas, and their group consolidated profit and loss position, given lack of clarity could be strong indicators of poor financial probity and weak financial standing.

We have included a question into the selection phase of a tender to enable it to ascertain whether there is a concern prior to awarding an in-scope contract (above threshold).

Safeguarding

Within the standard template tender documents, the Council requests that bidders confirm that they have a safeguarding policy and that they adhere to the requirements set out by various safeguarding boards, that they have a whistleblowing policy and employ staff in line with Safer Recruitment Practices.

Oxford Living Wage

Within the standard template tender documents, the council seeks to promote and increase the number of suppliers that adopt the Living Wage Foundation rate or where the work is undertaken in Oxford, seek to understand whether a bidder currently pays or can commit to pay its employees the Oxford Living Wage.

Central Digital Platform

Bidders, their associated persons, or connected persons must disclose within their tender submission whether they are an excluded or excludable supplier. The Procurement team can check the bidder's statement against the excludable supplier list held on the Central Digital Platform. Grounds for exclusion include

- Convictions for offences including (although not limited to): bribery, blackmail, organised crime, fraud, robbery, terrorism, money laundering, modern slavery, corporate manslaughter, corporate homicide, labour market offences and tax-related offences;
- Been found by the CMA or another regulator to have participated in a cartel;
- Been deemed a threat to national security
- Failed to provide information requested by the authority

These exclusion criteria apply to offences and misconduct committed both in the UK and abroad.

There are further grounds for discretionary exclusion covering

- Bankruptcy, insolvency, or equivalent situations;
- Convictions relating to significant actual or potential environmental impacts;
- Professional misconduct, dishonesty, and impropriety;
- Potential competition infringements;
- Serious labour misconduct, even without conviction;
- Poor performance on a previous contract or breach of a previous contract that was not remedied after the opportunity was given to do so;
- Poor performance on a previous contract that led to contract termination and/or damages to have been awarded or a settlement to have been reached;
- Instances where a supplier acts improperly in a procurement, thereby putting itself at an unfair advantage;
- Instances where the supplier poses a risk to national security.

¹ [Public Expenditure Statistical Analysis 2025](#)

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³ [Common Areas of Spend definitions - Procurement](#)

Payment in Contracts (where appropriate)

For certain contracts questions are set in the tender templates relating to a bidder's performance in paying its supply chain promptly and effectively within the agreed contractual terms.

Skills and Apprentices (where appropriate)

For certain contracts bidders will be asked if they will be supporting apprenticeships and skills developments through the contract and to explain how it will develop and maintain skills relevant to the contract.

The Council commits in this strategy to consider adopting an ethical code of conduct for the purposes of contracts such as the Ethical Trading Initiatives base code.

10. CONCLUSION AND SUMMARY

With inadequate funding to meet constantly escalating demands on services, it is more important than ever to get the most possible value out of every pound spent. This is particularly the case when it comes to the procurement and management of a council's contracts with third parties.

When you consider that local government spent over £80bn with suppliers in the last financial year, Councils should explore how they can unlock the strategic value of procurement, especially in light of the new flexibilities introduced by the 2023 Procurement Act. It argues that procurement should move beyond compliance and be seen as a tool for delivering better outcomes for communities through better contract management, and a cultural shift to treat procurement as a strategic enabler rather than a transactional process.

Procurement at Oxford City has evolved over the last 5 years taking the procurement register from a difficult to manage excel spreadsheet to a manageable SharePoint tool enabling procurement to effectively engage with internal and external stakeholders in the timely management of their contracts, more recently with the introduction of the Business Partnering model, and the addition of information within the contract register to enable implementation and management of the new transparency requirements of the Procurement Act 2023.

This has resulted in a reduction in the level of exemptions being requested year on year, and an increase in the number of competitions undertaken through the procurement portal.

Procurement is now represented early in projects by the formation of the Procurement Board in 2024 which meets monthly, by attendance at Front Door of Change meetings and input into forms that require completion for Development Board – asking for more clarity on Procurement route / options and timescale.

Procurement must review the current procurement portal and the option to integrate the procurement Portal with the Procure to Pay system to enable transparency reporting, support KPI monitoring, contract management, and on-time publication of required notices. This will be included as part of the specification for the re- procurement of both systems during this strategic period.

Procurement needs to remain agile and needs to consistently evolve to deal with external changes, further updates to the Procurement Act, the Local Government Reorganisation, increased transparency requirements and a forward-thinking Council that wants to deliver for its people.

¹ [Public Expenditure Statistical Analysis 2025](#)

² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)

11. GLOSSARY

| | |
|--------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CWB | Community Wealth Building – a people centred approach to local economic development, which redirects wealth back into the local economy |
| FTS | Find a Tender Service – Noticing section of the Central Digital Platform for high value UK notices for publication of new procurements |
| H & S | Health & Safety |
| KPI's | Key Performance Indicators a quantifiable measure used to evaluate the success of Suppliers in meeting service level objectives |
| NPPS | National Procurement Policy Statement which the Council must give regard to for all above threshold procurements |
| PPA 2023 | Procurement Act 2023 which came into force on 24 th February 2025. |
| SLA's | Service Level Agreements – level of service expected by a customer from a supplier |
| SME | Small and Medium sized Enterprises defined by number of employees and turnover |
| SV | Social Value – measures the positive value businesses create for the economy, communities and society |
| SV Weighting | The percentage weighting applied in the evaluation stage of a tender process. |
| VCSE | Voluntary Community and Social Enterprise – a non-governmental organisation, which principally reinvests its surpluses to further social, environmental or cultural objectives. |

¹ [Public Expenditure Statistical Analysis 2025](#)

² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)

APPENDIX 1

HOW PROCUREMENT WILL SUPPORT INTERNAL STAKEHOLDERS

Procurement will support all new employees to the Council and its entities by delivering a range of training courses (the courses are also available as a refresher for existing employees). The courses include, but are not limited to:

- Procurement overview incorporating the external Regulations and the internal rules (the Constitution);
- Procure to Pay – Training of the Councils financial management system, Agresso ;
- Procurement Portal training;
- Evaluation training
- Contract management training

Procurement Business Partners will attend service area meetings to support and offer guidance in the planning process where new contracts / contract extensions may be required.

As part of its Service Level Agreement to internal stakeholders and to ensure compliance with Regulatory requirements, Procurement will continue to:

- Monitor SME and Local spend;
- Respond to requests for new supplier set up within 7 days (in conjunction with the payment team);
- Publish transparency reports in-line with the transparency requirements on the Council website;
- Respond to emails sent to procurement@oxford.gov.uk within 3 days
- Run tender processes within Regulation guidelines;
- Adhere to agreed service levels with both ODSL and OCHL as agreed from time to time.

A range of templates to support the contract lifecycle will continue to be updated and available.

CONTRACT MANAGEMENT

To support internal stakeholders in the management of the Council contracts procurement have produced a number of guides and assessments. All documents can be found on the Intranet

- A contract management guidance document detailing the Contract Manager Obligations.
- A selection of contract management KPI's and SLA's.

Procurement will continually review and update the documents in line with external Regulations and internal rules and will work with service areas to ensure that contract managers understand the requirements from both the buyer and supplier perspective.

All Guidance documents and templates can be found at [How do I?](#)

Contract Management must be embedded in a more holistic way across the Council and commercial knowledge of both the buyer and seller side understood if the Council is to improve its reputation as a good customer to do business with. This will increase the number of suppliers that wish to tender for Council opportunities which will ultimately result in better value for money (cost and quality).

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The Procurement Team have developed a contract Management Guide for Managers (Found on the intranet [Contract Handover.docx](#)). Procurement will support and train if required commissioning and contract managers throughout the procurement process but more specifically in ensuring that the contract delivers over and above what is expected by following the Contract Lifecycle Management including

1. Request or initiation (new or review an existing contract)
2. Contract creation & authoring (assemble a contract using existing and approved templates – self service capability)
3. Contract negotiation & Review (version control & audit trail)
4. Contract approval & execution (correct approval, signing & sealing)
5. Contract performance and analytics (milestones, obligations, payments, rebates, discounts) tracking, assigning and completing is critical to achieving the full value from the contract.
6. Contract amendment (part of the contract lifecycle whether we like it or not) dealt with efficiently without compromising the process or the guidelines in place
7. Contract expiry or renewal (using the procurement contract register/pipeline)

Procurement will keep up to date with relevant training available and will encourage commissioning officers and contract managers within the authority to access external training courses available on the subject such as the Contract Management Foundation course on offer from the Government Commercial College [Foundation \(govcommercialcollege.co.uk\)](#)

Under the new Procurement Act 2023 the Council has an obligation to publish up to 17 notices throughout the lifetime of a procurement project (pre procurement, during the procurement, post procurement during the delivery stage and at the end of the contract). Contract management is a critical role in ensuring that the contract delivers what it was procured to deliver and enables procurement to adhere to the requirements of the procurement Regulations. Contract Management must be embedded as a culture within the Council.

¹ [Public Expenditure Statistical Analysis 2025](#)

² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)

COMMERCIAL PROCUREMENT STRATEGY 2026- 2029

APPENDIX 2 ACTION PLAN TO DELIVER THIS STRATEGY

| Priority | Actions to Achieve | Timeline | Lead Procurement Officer |
|---------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------|-------------------------------|
| Social Value and Climate Change | Finalise new version of a social value template developed with other local authorities, universities and groups across Oxfordshire. | January 2026 | Strategic Procurement Manager |
| | Brief all Service Areas | January 2026 | Procurement Business Partners |
| | Improve Contract management, monitoring and reporting of Social Value | In force now and on-going | Strategic Procurement Manager |
| Deliver the procurement Portal | Extend Contract | Autumn 2025 | Procurement Business Partner |
| | Re-tender | Autumn 2026 | Procurement Business Partner |
| | Train all Buyers | Spring /Summer 2027 | Procurement Business Partner |
| | Transfer Data from incumbent provider to New Provider | Spring/Summer 2026 | Procurement Business Partner |
| Collaborative procurement | How to tender workshops | In force now and on-going | Procurement Business Partner |
| | Meet the buyer | February 2026, then yearly | Strategic Procurement Manager |
| | Working with company entities | In Force Now and on-going | Strategic Procurement Manager |
| | Industry days | When required | Procurement Business Partner |
| | Working with Social Enterprise Companies | In Force Now and on-going | Strategic Procurement Manager |
| Constitution Review | Continuous review on a yearly basis | Complete 2025 – review 2026 | Strategic Procurement Manager |
| Procurement template review | Continuous review | Complete February 2025 – constant review Addition of “Proscribed Activities” into the Conditions of Participation | Strategic Procurement Manager |
| Procurement Training | Procurement Overview | Delivered monthly from November 2025 | Procurement Business Partner |
| | Agresso | Delivered monthly | Procurement Officer |
| | Portal training | Delivered monthly or when required | Procurement Officer |
| Commercial Focus | Sell our services | When opportunities arise | Strategic Procurement Manager |
| | Manage the EV DPS | On-going | Strategic Procurement Manager |

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² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)

COMMERCIAL PROCUREMENT STRATEGY 2026- 2029

| | | | |
|----------------------|----------------------------------------------------------------------------------------------------------------------|---------------------------------------------|--------------------------------------------------|
| Contract Management | Basic contract management training | January 2026 then monthly | Procurement Business Partner |
| Spend Data | Analysis of Tail end spend (Maverick / Rogue spend) | Initial review by February 2026 then yearly | Procurement Support Officer |
| Audit | Audit of below threshold spend | To commence January 2026 then quarterly. | Procurement Support Officer |
| Intranet | Review of the intranet site | In-force – on-going | Strategic Procurement Manager |
| Terms and Conditions | Addition of" Proscribed Activities" – ability to terminate the Contract | 31 st March 2026 | Strategic Procurement Manger with Legal Services |
| Reports | Create a report to identify spend with VCSE's | Started October 2025 | Procurement Officer |
| | Review fields within Agresso to identify whether we will be able to extract FTS contract numbers into spend reports. | Started October 2025 | Procurement Officer |
| | Review the National Procurement Strategy Toolkit to identify areas for development | January – December 2026 | Strategic Procurement Manager |

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² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)

APPENDIX 3 CURRENT THRESHOLDS

Table 1: Oxford City Council Procurement Rules (Constitution Section 19)

| Value including VAT | Type | Quotes or Tendering | Process Led by |
|---------------------------------------|------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------|
| Up to £29,999.99 | Goods Works Services Concession | Minimum 1 quote in writing (local supplier if possible) or Use of an approved Framework | Officer authorised by the relevant Service Director |
| £30,000.00 and over up to FTS | Goods Services | Minimum of 3 written quotes (one from a local supplier if possible). 6 recommended as best practice or Use of an approved Framework | Officer authorised by the relevant Service Director |
| £30,000.00 and over up to £999,999.99 | Works Concession | Minimum 4 written quotes or Use of an approved Framework. Full tender process recommended as best practice. | Officer authorised by the relevant Service Director |
| Over FTS | Goods Services | Tender process in compliance with legal requirements undertaken via the Procurement Portal or Use of an approved legally compliant Framework or Dynamic Market | Authorised Procurement Practitioner or Procurement Team. |
| £1M and over up to FTS | Works Concession | Minimum 6 written quotes. A full tender process is recommended as best practice or Use of an approved legally compliant Framework or Dynamic Market | Authorised Procurement Practitioner or Procurement Team. |
| Over FTS | Works Concession | Tender process in compliance with legal requirements undertaken via the Procurement Portal or Use of an approved legally compliant Framework or Dynamic Market | Authorised Procurement Practitioner or Procurement Team. |
| | | | |

Table 2: Current Procurement Act Thresholds

| Type of Contract | Thresholds (Including VAT); 1 January 2024 to 31 December 2025 |
|--------------------------------|----------------------------------------------------------------|
| Works and Concession Contracts | £5,372,609.00 |
| Goods and Services Contracts | £214,904.00 |
| Light Touch | £663,540.00 |
| | |
| | |

¹ [Public Expenditure Statistical Analysis 2025](#)

² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)

APPENDIX 4 EXAMPLE SCORING MECHANISM

Conditions of Participation

Suppliers can be excluded on the following grounds

| Section | Assessment |
|---------------------------|-------------------------------|
| Exclusion Information | Pass/Fail |
| Financial Capacity | Pass/Fail |
| Insurance | Pass/Fail |
| Legal Capacity | Pass/Fail |
| Relevant Experience | Information only or Pass/Fail |
| Sub-Contractor Management | Information only or Pass/Fail |
| Organisational Standards | Pass/Fail |
| Health & Safety | Pass/Fail |
| Tackling Modern Slavery | Pass/Fail |
| Oxford Living Wage | Information Only |
| Safeguarding | Pass/Fail |
| Payment in Contracts | Information only or Pass/Fail |
| Carbon Reduction | Information only or Pass/Fail |
| Skills & Apprentices | Information only or Pass/Fail |
| | |
| | |

Bidders who successfully pass the conditions of participation will then be scored under the award criteria.

| Example headings for the Award Criteria | Weighting |
|-------------------------------------------------------|-----------|
| Technical Capacity | XX% |
| Understanding of the brief including program of works | XX% |
| Method Statements | XX% |
| Environmental and or Energy Management | XX% |
| Innovation and or Added Value | XX% |
| Social Value | 10% |
| Price | XX% |
| | |
| | |

ICT requirements including Cyber Security and GDPR are linked documents to be included as and when appropriate

The weighting is project based and is based on determining the Most Advantageous Tender (MAT)

¹ [Public Expenditure Statistical Analysis 2025](#)

² [National Procurement Policy Statement - GOV.UK](#)

³ [Common Areas of Spend definitions - Procurement](#)

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To: Cabinet
Date: 10 December 2025
Report of: Nigel Kennedy Group Finance Director
Title of Report: Delegation to purchase fleet vehicles 2025/26

| Summary and recommendations | |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Decision being taken: | To delegate authority to the Group Finance Director for the remainder of the current financial year to award any fleet contracts valued in excess of £750k following a compliant procurement process. |
| Key decision: | Yes |
| Cabinet Member: | Councillor Nigel Chapman, Cabinet Member for Citizen Focused Services and Council Companies |
| Corporate Priority: | A well run Council |
| Policy Framework: | None |

| |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Recommendation(s): That Cabinet resolves to: |
| 1. It is recommended that Cabinet resolves to delegate authority, for the remainder of the current financial year, to the Group Finance Director to award contracts with values in excess of £750k for the purchase of fleet vehicles. |

| Information Exempt From Publication |
|-------------------------------------|
| N/A |

Introduction and background

1. Fleet utilised by Oxford Direct Services Limited (“ODSL”) and Oxford Direct Services Trading Limited (“ODSTL”) are purchased by the Council. The Council enter into the contracts and make payment to the suppliers, with ODSL working with OCC Procurement carrying out the procurement. The vehicles are owned by the Council, depreciated over 7 years but leased to ODSL over that time with an appropriate leasing charge inclusive of interest payable to Council under the lease arrangements.

2. ODSL scope and determine need in terms of fleet management. Fleet is used across a range of functions, including housing, waste, streets and parks. Life cycle of the fleet ranges typically from 7 to 10 years.
3. The fleet that is being replaced is at multiple years in its life span and therefore with a number of the vehicles there is a reliability risk, though they are currently operational. None of the existing vehicles will be sold until the delivery of replacement vehicles.
4. A number of Fleet Frameworks (including but not limited to CCS (Crown Commercial Services), ESPO (Eastern Shires Purchasing Organisation), YPO (Yorkshire Purchasing Organisation), TPPL (The Procurement Partnership) will be reviewed for potential use to establish value for money for the purchase of vehicles.
5. The procurement team may also run Request for Proposal or Invitation to Tender processes if the framework option does not represent value for money.
6. Fleet that remain to be purchased within this financial year are as follows

| Vehicle Type | Quantity | Draft price (excluding VAT) |
|---------------------|-----------------|------------------------------------|
| Medium Van | 9 | £315,000 |
| Large Van | 14 | £560,000 |
| Luton Van | 2 | £90,000 |
| 7.5t Box Lorry | 1 | £55,000 |
| Tippers | 29 | £1,218.000 |
| Cars | 3 | £71,000 |
| 4x4 Pick Up | 4 | £200,000 |

Contract Rules Compliance and Financial Assessment

7. All procurements will be undertaken in accordance with the Public Procurement Regulations and OCC procurement policies and the Council's Constitution. All vehicle procurement falls under the Vehicle Capital Replacement Programme. The budget is allocated from OCC Finance and monitored via Smartsheet to the City Council Capital Monitoring Board.

Alternative Options Considered

8. N/A

Financial implications

9. The fleet vehicle budget is approved within the capital budget provision for the vehicle replacement programme by Council in February each year. The last approval for this financial year 2025 – 2026 was made in February 2025 in the sum of £3.5million.
10. The budget for the replacement of fleet vehicles together with the leasing repayments are included within the Council's revenue and capital programmes.

ODSL will be responsible for the leasing payments to the Council as well as the running costs in relation to the vehicles.

Legal issues

11. Under Part 4.5 (11) and Rule 19 (17) of the Constitution Cabinet is responsible for the award of contracts valued at £750,000 and over. Under section 9E (3) (c) of the Local Government Act 2000 Cabinet is empowered to delegate its functions to officers.
12. The purchase of vehicles needs to comply with Part 19 of the Council's constitution. Where the estimated spend under a contract for the purchase of vehicles is in excess of the applicable threshold under the Procurement Act 2023 the procurement exercise must comply with the act. Legal services can support and advise on the procurement process and provide the contract documentation if needed.
13. Any decision taken under the proposed delegation (to award a contract of £750,000 or greater) will be a Key Decision and will need to comply with the procedure for taking Key Decisions set out in the Council's Constitution.
14. The Council must ensure that the proposed leasing is compliant with the applicable Subsidy Control requirements and legal advice must be sought where necessary.

Level of risk

15. To not replace life expired vehicles will impact on the ability of ODSL to deliver effective services.
16. The delay in the procurement of the vehicles increase the risk of additional costs to ODSL should they need to hire replacement vehicles before the replacement of the aging fleet.

Equalities impact

17. Not applicable

Carbon and Environmental Considerations

18. Investigations are being made by the fleet team and the Council's Sustainability team.

| | |
|----------------------------|-------------------------------|
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| | |
|--------------------------------|-----------------------|
| Background Papers: None | |
| 1 | Councils Constitution |
| 2 | |
| 3 | |
| 4 | |

| | |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------|
| To: | Cabinet |
| Date: | 10th December 2025 |
| Report of: | Head of Environmental Sustainability |
| Title of Report: | Land Quality Strategy – December 2025 |
| Summary and recommendations | |
| Purpose of report: | To agree the adoption of the Land Quality Strategy 2025 |
| Key decision: | Yes |
| Cabinet Member: | Councillor Anna Railton |
| Corporate Priority: | Zero Carbon |
| Policy Framework: | Part 2a of the Environmental Protection Act (1990) |
| Recommendation(s): That Cabinet resolves to: | |
| <ol style="list-style-type: none"> 1. To approve the revised Land Quality Strategy for adoption. 2. To continue to endorse the approved procedure for dealing with contaminated land by: <ul style="list-style-type: none"> - Using the development control regime wherever possible in order to assess and remediate land affected by contamination. - Where this is not possible we will utilise powers under Part 2a of the Environmental Protection Act (1990) in order to ensure contaminated land is remediated. 3. To note that if works are required under Part 2a Of the Environmental Protection Act (1990), then this will be funded from contingencies and reserves. | |

| Appendices | |
|-------------------|----------------------------------|
| Appendix 1 | Draft Land Quality Strategy 2025 |
| Appendix 2 | Risk Register |

Introduction and Background

1. There is a statutory requirement for the Council to have a Land Quality Strategy in accordance with national contaminated land legislation. Part 2A of the Environmental Protection Act 1990(EPA) was introduced in April 2000 to provide a system for the identification and remediation of land with the potential to cause a risk to human health or the environment from contamination. The legislation places a duty on local authorities to produce a strategy outlining how it will identify and address potentially contaminated land in its district area.
2. The proposed Land Quality Strategy seeks to provide a clear framework for addressing land contamination at a local level within the national policy framework. The Strategy has been developed following consultation with internal stakeholders. The Strategy is required to be reviewed on a 5 yearly cycle.
3. The Council first published a Contaminated Land Inspection Strategy in 2001 and an updated Land Quality Strategy in 2014. This was reviewed in December 2020. This proposed Draft Land Quality Strategy 2025 presents a minor update to the 2020 Strategy which is required following changes to guidance and legislation.
4. Since 2001 the City Council has prioritised over 800 potentially contaminated sites according to risk and ten proactive investigations have been undertaken by the Council. No sites in Oxford have to date been determined as “contaminated land” as defined in the Act.
5. The legal definition of “contaminated land” set out in the Act is as follows:
“Any land which appears to the local authority in whose area it is situated to be in such a condition, by reason of substances in, on or under the land that (a) significant harm is being caused or there is a significant possibility of such harm being caused; or (b) significant pollution of controlled waters is being caused, or there is a significant possibility of such pollution being caused”
6. It is important to note that a site will not meet the definition of “contaminated land” just because contamination is found to be present. For a site to be determined as “Contaminated Land” it must be proven that there is a clear contaminant – pathway – receptor linkage and that significant harm (or significant possibility of significant harm) is being caused as a result.
7. In December 2020 Cabinet approved a Land Quality Strategy for Oxford. This report presents and recommends adoption of an updated Land Quality Strategy for Oxford. This draft Land Quality Strategy 2025 represents a very minor update to the existing Land Quality strategy, so it is not proposed to hold a public consultation.
8. The amendments to this strategy over the current strategy include updated links to documents, updates to paragraph references within the National Planning Policy Framework, a short paragraph about the potential impact of Local Government Reorganisation, changes to formatting and minor additions regarding sustainable remediation.

Strategy Aim

9. To deliver an efficient and effective framework for managing land affected by contamination by;
 - Using the development control regime wherever possible in order to assess and remediate land affected by contamination.

- Where this is not possible we will utilise powers under Part 2a of the EPA (1990) in order to ensure contaminated land is fully remediated.

Strategy Objectives

10. The strategy contains the objectives below as the means to comply with our statutory duties both as enforcement authority and land owner.
- Objective 1 – To deal with land contamination through the development control and building control processes wherever possible.
 - Objective 2 – To implement the Part 2A detailed inspection process where strong evidence becomes available that significant harm is occurring or will occur unless the council intervene, and remediation through planning, building control or voluntary action is not possible.
 - Objective 3 – To maintain and continue to update a comprehensive land quality database for Oxford.
 - Objective 4 – To promote the use of sustainable remediation where possible.
 - Objective 5 – To act as a responsible landowner to ensure the Council achieves full legal compliance.
11. The approach of the draft Strategy is to maximise redevelopment through the planning process to address contamination issues and to use Part 2A powers only where appropriate. Efficient information management is fundamental to applying the appropriate controls through the planning process to ensure affected land is made suitable for use.

Review

12. It is proposed to continue to review the Strategy every 5 years or as required through changes to legislation or statutory guidance.

Environmental Impact & Sustainability

13. The effective management of land affected by contamination positively contributes to reducing environmental impacts. Improving the quality of our soil and water resources leads to healthier ecosystems which increases our resilience to climate change.
14. Re-using land and the redevelopment of brown-field sites, is by its nature a sustainable approach, and underlies the government's commitment and overall objective to bring damaged land back into beneficial use.
15. A commitment to encourage sustainable remediation methods as set out in the Strategy should contribute to reducing the amount of waste soils sent to landfill and reduce lorry movements associated with site re-development. By reducing the amount of waste that is sent to landfill and reducing traffic movements we are helping to reduce the carbon footprint of remediation activities and reducing potential impacts to air quality.

Consultation and Communications

16. Internal consultation with legal and finance will be completed in accordance with standard Council procedures. External consultation with nearby local authorities within Oxfordshire has also been completed. As the draft Land Quality Strategy 2025 represents a minor update to an existing approved strategy, it is not proposed to hold a public consultation.

Financial Implications

17. If land is determined as “contaminated land”, the Local Authority has a duty to secure remediation and to ensure the “appropriate person” (principally, the polluter) pays for remediation wherever possible. Where the polluter cannot be identified, the owner or occupier of the land may be liable. Detailed inspection and remediation can be very costly and a significant part of the legislation is focused on identifying and recovering the costs of remediation from the appropriate person.
18. The [Contaminated Land Statutory Guidance 2012](#) sets out that in general the enforcing authority should seek to recover all of its reasonable costs. However, it further states that the authority should “waive or reduce” the recovery of costs to avoid any undue hardship which the recovery may cause. Hardship should be taken into account for individuals, trusts, charities etc. The guidance states that “in making such decisions, the authority should bear in mind that recovery is not necessarily an “all or nothing” matter (i.e. where reasonable, appropriate persons can be made to pay part of the authority’s costs even if they cannot reasonably be made to pay all of the costs).”
19. It should be noted that it is theoretically possible that the Council could be identified as the appropriate person as a landowner and/or as “the polluter” (e.g. pollution from former council landfill sites, council depots with fuel tanks etc.).
20. To help cover the costs of investigation and remediation, local authorities have previously been able to apply for funds from DEFRA. However, in December 2013 this funding mechanism was removed. Should a high risk site be identified as needing further investigation and/or remediation there are now limited funding options for local authorities to manage the risks efficiently. Furthermore, in cost recovery, if hardship is to be taken into account, the Council may need to be able to finance all or part of the work.
21. The strategy proposes to encourage investigation and remediation through the planning process and through voluntary action and to only use Part 2A powers as a last resort. The Council does not currently have any sites which have been identified as having a significant possibility of significant harm occurring. However, this may change as new information becomes available.
22. The bulk of the workload of data management, planning control and review can be delivered within present funding levels.
23. Funding is not available to cover action under Part 2A following the Governments withdrawal of grant money and it would therefore be prudent that the City Council ensure that contingency funding is made available in the event that action under Part 2A is required. Based upon previous experience it is estimated that the Council should be aware that around £150k may be required for this purpose. In the event that this is required, then the Head of Finance Services will arrange for this to be funded from reserves and contingencies.

Legal issues

24. Under Part 2A of the Environmental Protection Act 1990, local authorities have a statutory duty to inspect their area with a view to identifying contaminated land and to do this in accordance with the Contaminated Land Statutory Guidance. The relevant sections of the Act include:
- (a) Section 78B(1): Every local authority shall cause its area to be inspected from time to time for the purpose – (a) of identifying contaminated land; and (b) of enabling the authority to decide whether any such land is land which is required to be designated as a special site.*
 - (b) Section 78B(2): In performing [these] functions... a local authority shall act in accordance with any guidance issued for the purpose by the Secretary of State.

Level of risk

25. The updated land quality strategy sets out our statutory responsibilities and how we intend to meet them. The adoption of the strategy itself should reduce reputational risk to the council by communicating our roles and responsibilities clearly. The Strategy also clearly explains the definition of contaminated land in a legal sense, which should help to clarify possible misconceptions surrounding contaminated land responsibilities and management. However, there are potentially significant reputational and financial risks to Oxford City Council if contaminated land is not managed appropriately.
26. There are potentially significant financial implications of undertaking Part 2A work. Our responsibilities under Part 2A are not new but changes to the statutory guidance and limited government financial support for the regime mean that there remains a degree of financial risk for local authorities. The adoption of the strategy should enable the Council to be better prepared in the event that a significant issue relating to land contamination occurs.
27. The emphasis on using the development control process to remediate land should minimise this risk and ensure that land owners and developers bear this cost rather than local tax payers.
28. The financial risks associated with these statutory duties have been mitigated by previous actions to identify and assess sites so that there is now a good level of knowledge about potentially contaminated sites in the city.
29. The progress of local government reorganisation and devolution should not significantly impact the overall strategic aims of the Land Quality Strategy since all local authorities require one. However it is highly likely that responsibility for the delivery of the Land Quality Strategy will fall to the successor authority and there will likely be a requirement for amalgamation of those local authority Land Quality Strategies that exist following local government reorganisation and consequent adoption by the new successor authority.
30. A risk register has been completed and is available to view in Appendix 2.

Equalities impact

31. An Equalities Impact Assessment was carried out prior to the previous Strategy being adopted by the City Executive Board in 2014. No equalities impacts were identified at the time. The updated Strategy contains only minor amendments from

the previous Strategy which are not expected to impact on equalities so a further Equalities Impact Assessment has not been considered necessary.

* *Special sites* are cases of land contamination where the Environment Agency is the enforcing authority for the purposes of the Part 2A regime.

| | |
|----------------------------|----------------------------------------------------------------|
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| |
|----------------------------------|
| Background Papers: |
| Draft Land Quality Strategy 2025 |

Land Quality Strategy

December 2025



A Land Quality Strategy for Oxford

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Introduction

What is Land Quality?

In the UK the legacy of our industrial past can have a significant impact on land quality. Land quality refers to the extent to which land is free from contamination, which is most commonly associated with former industrial land uses. It is important to manage these effects to improve the quality of our natural and built environment, both at a local and national level.

There are significant environmental, social and economic benefits to improving land quality and managing contaminated land efficiently. Socially these include opening up the potential for urban regeneration and improved quality of life. Environmentally, the pressure for greenfield development can be reduced, soil can be recycled and the quality of the natural environment (especially water resources) can be dramatically improved. Economically, there are local and national benefits including the development of innovative new remediation technologies and increasing the potential for brownfield redevelopment.

This strategy is a requirement of national contaminated land policy and seeks to provide a clear approach for addressing land contamination at a local level within the national policy framework. This strategy is a review of the previous approved strategy adopted and published in 2020.

This strategy seeks to ensure that Oxford's residents and natural environment are not exposed to unacceptable risks from land contamination and to improve our environment for a sustainable future. This will be achieved by working together with developers, landowners and other key stakeholders to manage the risks from land affected by contamination efficiently and effectively.

The Policy Framework

The Contaminated Land regime in the UK seeks to address the legacy of historic pollution using a risk based approach. The risk based approach is applied in the planning system through new development, and through provisions in the Environmental Protection Act 1990 (EPA). In 2012 Defra published revised [statutory guidance](#) which clarifies local authority's responsibilities for managing land contamination.

Land contamination can harm:

- human health
- drinking water supplies, groundwater and surface water
- soils
- ecosystems including wildlife, animals and wetlands
- property

It can also affect the current and future land use.

For a risk to exist from contamination there must be a complete contaminant linkage involving; a contaminant, a pathway and a receptor¹.



The risk assessment process seeks to identify viable contaminant linkages and then assesses whether they pose an unacceptable risk to an identified receptor. A Conceptual Site Model is produced which summarises the most plausible contaminant linkages. Remediation and mitigation measures are used to break unacceptable contaminant linkages for example, by removing either the contaminant, the pathway or the receptor.

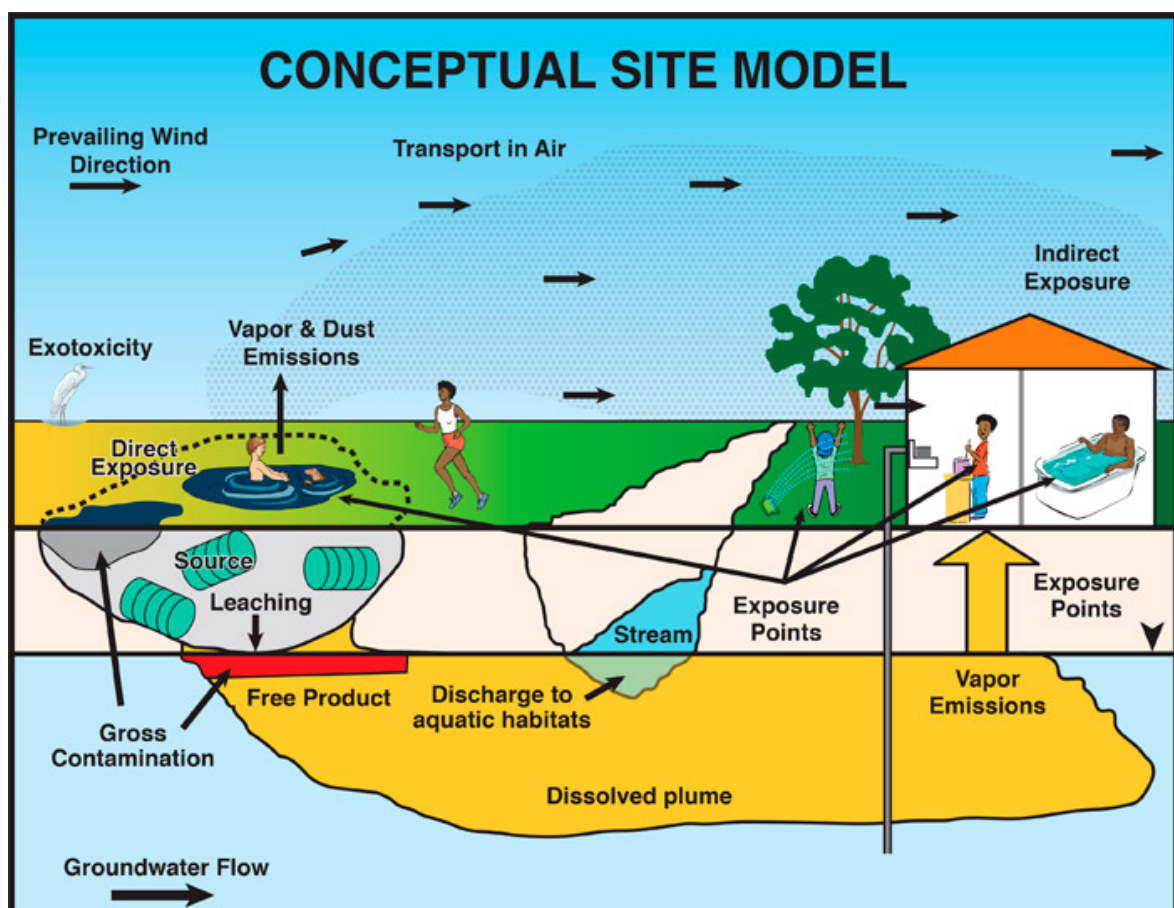


Figure 1: Example of a conceptual model

¹ A contaminant is a substance that is in, on or under the land that has the potential to cause harm or pollution. A receptor is something that could be adversely affected by a contaminant, such as people, ecological systems, property or a water body. A pathway is a route or means by which a receptor can be exposed to, or be affected by, a contaminant.

Part 2A of the Environmental Protection Act

All local authorities have a duty to identify contaminated land in its district area under Part 2A of the [Environmental Protection Act 1990](#).

The objectives of the Part 2A regime are:

- a) To identify and remove unacceptable risks to human health and the environment.
- b) To seek to ensure that contaminated land is made suitable for its current use.
- c) To ensure that the burdens faced by individuals, companies and society as a whole are proportionate, manageable and compatible with the principles of sustainable development.

Local authorities are required to undertake strategic and detailed inspections to identify contaminated land. Sites should be prioritised according to those that are most likely to pose the greatest risk to human health or the environment. If contaminated land is identified, the Local Authority has a duty to secure remediation, and to ensure the “polluter” pays wherever possible. The definition of contaminated land is defined in the Act as:

“Any land which appears to the local authority in whose area it is situated to be in such a condition, by reason of substances in, on or under the land that (a) significant harm is being caused or there is a significant possibility of such harm being caused; or (b) significant pollution of controlled waters is being caused, or there is a significant possibility of such pollution being caused”

For a site to be determined as “Contaminated Land” it must be proven that there is a clear contaminant – pathway – receptor linkage and that significant harm (or significant possibility of harm) is being caused as a result.

If land is legally determined as “Contaminated Land” a remediation strategy must be agreed and the details must be entered onto the local authority’s [Public Register of Contaminated Land](#), in accordance with the requirements of the Contaminated Land Regulations (Section 78R of the Environmental Protection Act 1990).

Part 2A is primarily used where no other options to remediate the land are available, such as voluntary action or as a requirement of redevelopment through the planning system.

NOTE: Since the removal of central Government funding for local authorities to carry out the inspection of potentially contaminated land, and remediation where unacceptable risks are identified, budgetary constraints mean that proactive Part2a site inspection within Oxford City Council area will only occur where unacceptable risks have been identified and harm is being caused.

The Planning System

Land contamination is a material planning consideration. This means that the impact of contamination must be taken into account in the determination of all planning applications. The [National Planning Policy Framework](#) 2012 (NPPF), as revised most recently in December 2024, sets out that the planning system is central to bringing land affected by contamination back into use and puts the responsibility for ensuring safe developments onto the developer and/or landowner (Paragraph 197).

Paragraph 187 of the revised National Planning Policy Framework (NPPF) states that; “planning policies and decisions should contribute to and enhance the natural and local environment by:

- e) preventing new and existing development from contributing to, being put at unacceptable risk from, or being adversely affected by, unacceptable levels of soil, air, water or noise pollution or land instability. Development should, wherever possible, help to improve local environmental conditions such as air and water quality, taking into account relevant information such as river basin management plans; and*
- f) remediating and mitigating despoiled, degraded, derelict, contaminated and unstable land, where appropriate.”*

Importantly, the NPPF (paragraph 196) states that planning policies and decisions should ensure that:

- “a) a site is suitable for its proposed use taking account of ground conditions and any risks arising from land instability and contamination. This includes risks arising from natural hazards or former activities such as mining, and any proposals for mitigation including land remediation (as well as potential impacts on the natural environment arising from that remediation);*
- b) after remediation, as a minimum, land should not be capable of being determined as contaminated land under Part 2A of the Environmental Protection Act 1990; and*
- c) adequate site investigation information, prepared by a competent person, is available to inform these assessments.*

Oxford City Council works with developers to ensure that land is properly assessed and remediated in line with legal requirements and up to date guidance.

Table 1.1 summarises the interactions between the two policy mechanisms for the management of contaminated land in the UK.

Table 1.1

| Part IIA | Planning |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> • Takes a proactive approach | <ul style="list-style-type: none"> • Takes a reactive approach |
| <ul style="list-style-type: none"> • Considers all sites (particularly sites without potential for redevelopment) | <ul style="list-style-type: none"> • Only considers sites that are being redeveloped |
| <ul style="list-style-type: none"> • Identifies “Contaminated Land” using the legal definition | <ul style="list-style-type: none"> • Seeks to ensure land cannot be determined as “Contaminated Land” in the future |
| <ul style="list-style-type: none"> • Only considers the current use of the site | <ul style="list-style-type: none"> • Considers the proposed use of the site |
| <ul style="list-style-type: none"> • Responsibility lies with the council to demonstrate that significant possibility of significant harm exists. <p>The starting point is that the land is not contaminated and it must be proved that it is.</p> | <ul style="list-style-type: none"> • Responsibility lies with the developer to demonstrate that significant harm is unlikely and the site is suitable for use. <p>The starting point is that the land may be contaminated and it must be proved that it isn't.</p> |

Source: LQM

Environmental Sustainability in Oxford

The Environmental Sustainability service at the Council is the policy lead on carbon, energy and the environment. It is responsible for the City Council's Carbon Management plan and the city-wide collaborative programme of Net Zero Carbon Oxford. It works across the organisation to assist in carbon emission reductions alongside key regulatory functions on air quality, biodiversity, tree protection, flood mitigation and land quality. The Land Quality Strategy sets out the positive steps that are taken by the City Council to address pollution affecting land with an emphasis on dealing with land affected by contamination through the planning development control process.

This Land Quality Strategy recognises the importance of sustainability in the management and remediation of contaminated land. Re-using land and the redevelopment of brown-field sites, is by its nature a sustainable approach, and underlies the government's commitment and overall objective to bring damaged land back into beneficial use.

The City of Oxford

The impacts of contamination are affected by site specific circumstances and the interactions between the natural and built environment. To fully assess the impacts, former and current land use combined with geological, hydrogeological and ecological factors need to be understood.

Oxford, as with the rest of the UK, has seen significant land use changes, particularly with regard to industry. The Thames was linked by canal with the Coventry Canal in 1789 and this provided efficient access to fossil fuel and led to the growth of industry along Oxford's watercourses. Oxford has also been a centre for car and car parts manufacturing as well as printing and publishing. However, more recently, the manufacturing industry has relatively declined, and there has been a shift into the service industries.

Oxford covers an area of 17.6 square miles and has very high levels of housing density, yet 52% of land in the city is made up of open space. 27% of Oxford is in the Green Belt with much of this land located in the flood plain. Furthermore, extensive areas of the City are of importance for nature conservation and could potentially be affected by contamination. The Oxford Meadows Special Area of Conservation (SAC), part of which is within Oxford's boundary, is designated by the European Commission as being of European importance for its biodiversity interest. There are 12 sites designated as Sites of Special Scientific Interest (SSSIs) and many wetland habitats of importance including the City's watercourses, ponds and nationally rare fen habitat.

As part of the continuing implementation of the [Oxford Core Strategy 2026](#) an Oxfordshire Strategic Housing Market Assessment was undertaken to identify the housing needs in the City in 2014. The evidence shows that over the period 2011-2031, there is a projected need for between 4,678 – 5,328 homes a year across Oxfordshire to meet projected demand. In Oxford, this equates to an annual average demand of 1,400 dwellings. There is, therefore, significant pressure to develop and redevelop the City. The constraints to development in Oxford mean that a significant number of housing proposals are likely to come forward on brownfield sites which may be affected by contamination.

[The Oxford Local Plan 2016-2036](#) contains detailed policies which planning applications will be judged against. Within Chapter 4 '*Making wise use of our resources and securing a good quality local environment*' **Policy RE9: Land Quality** states that;
'Planning applications where proposals would be affected by contamination or where contamination may present a risk to the surrounding environment, must be accompanied by a report which:

a) details the investigations that have been carried out to assess the nature and extent of contamination and the possible impacts it may have on the development and its future users, biodiversity, the natural and built environment; and

b) sets out detailed mitigation measures to allow the development to go ahead safely and without adverse effect, including, as appropriate:

i. removing the contamination;

ii. treating the contamination;

iii. protecting and/or separating the development from the effects of the contamination;

iv. validation of mitigation measures.

Where mitigation measures are needed, these will be required as a condition of any planning permission.'

Strategy Vision

To ensure that Oxford's residents and its natural environment are not exposed to unacceptable risks from historic contamination and to improve the quality of our environment for a sustainable future.

Strategy Aim

To deliver an efficient and effective framework for managing land affected by contamination.

Doing this by:

- **Using the development control regime wherever possible in order to assess and remediate land affected by contamination.**
- **Where this is not possible and there is a pressing need we will utilise powers under Part 2a in order to ensure contaminated land is fully remediated.**

In order to realise this aim and to undertake our duties as set out in the [Contaminated Land Statutory Guidance 2012](#), the following strategic objectives have been identified:

Strategy Objectives

- Objective 1 – To primarily deal with land contamination through the development control and building control processes wherever possible.
- Objective 2 – To implement the Part 2A detailed inspection process where strong evidence becomes available that significant harm is occurring or will occur unless the council intervene, and remediation through planning, building control or voluntary action is not possible.
- Objective 3 – To maintain a comprehensive land quality database for Oxford.
- Objective 4 – To promote the use of sustainable remediation where possible.
- Objective 5 – To act as a responsible landowner to ensure the Council achieves full legal compliance.

Objective 1

To deal with land contamination through the development control and building control processes wherever possible.

What have we achieved to date?

Oxford has seen significant industrial change to the present day. Oxford's industrial history has resulted in a substantial amount of land affected by contamination. Almost all of the major former industrial sites have been remediated and redeveloped, such as Lucy's in Jericho and the former car factory site in Cowley. The former Wolvercote Paper Mill has also been remediated and re-developed for residential use. However, there remain a significant number of smaller sites that may still have the potential to be affected by contamination.

In partnership with the other districts in Oxfordshire, the guidance document [Dealing with Land Contamination During Development: A Guide for Developers](#) has been produced for developers which sets out local requirements for contaminated land management.

Processes have been implemented within the planning department to ensure that land quality is considered at the planning application stage and to make it easier for developers to submit the appropriate information.

How will this objective be achieved?

It is expected that the development of brown field sites for housing and other uses will continue to be the main way that the remediation of sites containing contaminants is accomplished. In order to ensure we maximise the potential of the planning system, Oxford City Council will:

- Continue to provide comprehensive information to developers to ensure that they are able to meet local and national requirements.
- Engage in pre-application discussions with developers to ensure that contamination is taken into account in the early stages of development.
- Continue to secure appropriate site investigation information in the early stages of development.
- Continue to secure appropriate investigation and remediation through planning conditions.
- Ensure that land contamination is taken into account when developing planning policy documents. 'Policy RE9: Land Quality' is already within the current Local Plan (2016-2036) and will be updated for the forthcoming local Plan 2045.

Objective 2

To implement the Part 2A detailed inspection process where strong evidence becomes available that significant harm is occurring or will occur unless the council intervene, and remediation through planning, building control or voluntary action is not possible.

What have we achieved to date?

In 2001, Oxford City Council adopted a Contaminated Land Inspection Strategy as required by Part 2a of the Environmental Protection Act 1990. The legislation places a duty on local authorities to inspect their area “from time to time” for contaminated land. The statutory guidance sets out that local authorities should undertake strategic inspections of their area and detailed inspections on sites where an unacceptable risk may exist.

Strategic Inspection

In 2001 Oxford City Council undertook a strategic inspection of its district area to identify land that has the potential to be affected by historic contamination. This involved a systematic review of historic land use maps to identify sites such as landfill sites and those with a former industrial use. The process has now resulted in the derivation of a comprehensive list of potentially contaminated land but no formal determinations have been required to date. These sites are managed by the use of Geographic Information System (GIS) and are prioritised according to risk. Sites with a high priority status are earmarked as needing detailed inspection.

Detailed Inspection

The statutory guidance sets out that detailed inspection should involve carrying out investigations of identified land to obtain information on ground conditions. Risk assessment shall then be undertaken to support decisions under the Part 2A regime.

Prior to 2001 a number of sites were remediated outside of the planning process through voluntary action. Between 2001 and 2007, nine proactive detailed inspections were undertaken by the City Council with only two requiring some level of remediation. The South Oxford Adventure Playground was inspected in 2020 and no remedial treatment work was required. In addition, a review of all closed former landfill sites in Oxford City has been completed and none was identified as presenting any significant potential contamination risks. This assessment will be updated as and when any new information becomes available.

At present it is considered that there is a good knowledge of potentially contaminated land within the city and no sites present an immediate and unacceptable risk to occupiers or the surrounding environment.

How will this objective be achieved?

The 2001 Contaminated Land Inspection Strategy was updated in 2014 to reflect changes in the contaminated land regime, principally the publication of revised statutory guidance in April 2012. This 2025 updated strategy still includes the procedures involved in identifying priority sites and undertaking detailed inspections but also includes the relevant updates to the National Planning Policy Framework.

Significant resources are required to undertake detailed inspections. At present we are not aware of any unacceptable risks presenting themselves from any of our prioritised sites. The process for prioritising sites for detailed inspection is included in Appendix 1.

In line with our statutory duties Oxford City Council is committed to the following:

- Undertake regular reviews of the current prioritisation list and update preliminary risk assessments as required.
- Seek funding opportunities where possible to undertake any necessary further investigations by specialist consultants.
- Implement the detailed inspection process should any significant harm or significant possibility of significant harm become apparent.
- Maintain the Public Register of Contaminated Land, in accordance with the requirements of the Contaminated Land Regulations (Section 78R of the Environmental Protection Act 1990).
- Ensuring that the precautionary approach is taken to land contamination whilst seeking to ensure that disproportionate burdens are not placed on local communities and local businesses.

Objective 3

To maintain a comprehensive land quality database for Oxford.

What have we achieved to date?

Oxford City Council has developed Geographical Information System (GIS) layers for the management of site investigation data held on sites with known or suspected contamination. This land quality GIS is linked to a database where all site records are stored.

The land quality database and GIS system enables Oxford City Council to undertake the following:

- Prioritisation of sites for detailed investigation under Part 2A.
- Identification of potentially contaminated sites to be investigated or remediated through the planning process.
- To facilitate the provision of an environmental search service for prospective house buyers, solicitors and environmental consultants.

Historic land use information on over 800 sites has been added to the Land Quality GIS together with the first 4 editions of the Ordnance survey maps. These have been incorporated into the GIS layers along with data sets from the Environment Agency and the British Geological Survey (BGS).

How will this objective be achieved?

- Continue to store all new site investigation information in the electronic database and manage this data efficiently.
- Continue to update contaminated land GIS layers as sites are assessed and remediated or new site information becomes available, through liaison with planning, the Environment Agency and landowners.
- Identify potential opportunities to continually improve the system.

Objective 4

To promote the use of sustainable remediation where possible.

What have we achieved to date?

The most widely used method of remediation in Oxford and nationally to date has been the removal and offsite disposal of contaminated soil. Whilst this is often the most cost-effective solution on smaller sites, this method often contributes to sending waste to landfill. Some less contaminated soils can be removed to off-site soil hubs where soil mixing and treatment options can occur to allow re-use of soils. Other more sustainable on-site methods exist for particular types of ground contamination, such as soil washing, chemical oxidation and bio-remediation. However this usually requires suitable areas set aside for this work and can be time consuming to achieve.

Other remediation methods widely used include applying cover systems to affected areas such as clean soil layers or membranes. Whilst these methods can be effective in breaking contaminant linkages and often render sites suitable for use in accordance with current guidance, future redevelopment of these sites may again expose contamination risks, so it is important to ensure such remediation is fully documented to alert future landowners.

In order to contribute to the sustainable development of Oxford, it is important that we encourage developers to use sustainable remediation techniques wherever possible.

How will this objective be achieved?

- Encourage developers to use best-practice techniques for remediation and identify the requirement for sustainable remediation within the [Oxfordshire Planning Advice Note](#)
- Signpost to best practice on our website, for example the standard methodology provided in ISO 18504:2017 and the principles and best practice promoted by [SuRF-UK](#).
- Work towards requiring a remediation options sustainability appraisal from developers for sites where remediation is necessary.
- Work with planning policy to require high quality sustainable remediation from developers and make reference to it within policy in the upcoming Local Plan 2045.

Objective 5

To act as a responsible landowner to ensure the Council achieves full legal compliance.

What have we achieved to date?

In 1989 Oxford City Council commissioned a review of former landfill sites in the city. It was a comprehensive piece of work that has allowed the city council to manage risks associated with those sites. A review of council owned allotments sites was also undertaken in the 1990s following some concerns about the quality of the land as a growing medium. Since then council owned land, such as former depots, have been redeveloped to housing and the necessary site investigations and remediation secured through the planning process. More recently, a further review of former council landfill sites has been completed to assess potential residual risks and confirm that they are suitable for their current use. Some of these sites are now subject to re-development proposals under the Local Plan 2016-2036.

How will this objective be achieved?

- Continue to review and assess City Council owned land as necessary to ensure any potential contaminants continue to be appropriately managed.
- Ensure that all development undertaken by the city council or on city council land seeks to maximise the use of in-situ sustainable remediation techniques to reduce the amount of waste sent to landfill.
- Ensure that the council undertakes voluntary remediation on its own land where necessary and encourages other landowners to do the same.
- Identify opportunities for bioremediation projects to improve land quality and enhance biodiversity.²
- Explore new and innovative best practice on remediation methods.

² Bioremediation is the treatment of land through the use of micro-organisms.

Risks and Implications

Communication

Communication around contamination must be done carefully to avoid unwarranted alarm and property blight issues. Land should only be described as “Contaminated Land” where it meets the legal definition and has been officially determined as such. In all other cases, where an unacceptable risk has not been identified, land should be described as having the potential to be affected by contamination.

Funding

Detailed Inspection and remediation of potentially contaminated sites can be very costly and local authorities have previously been able to apply for funds from the Government Department of Food and Rural Affairs (DEFRA) to cover the cost through the Land Capital Grants Scheme. This funding was available to local authorities for detailed investigation and remediation under Part 2A of the EPA(1990). However, in December 2013 DEFRA wrote to all local authorities in England to advise them that they will no longer be supporting this grant scheme. DEFRA’s justification for the removal of funding is based on the publication of the 2012 revised statutory guidance which enables local authorities to dismiss lower risk sites more easily. This means that now, should a high-risk site be identified as needing further investigation and/or remediation, there are very limited funding options available for local authorities to manage the risks. In such cases, funding would need to be sought from the owner or operator of that land under the polluter pays principle and voluntary action encouraged. Failing this, enforcement action can be taken using statutory powers under the EPA(1990).

Where potentially contaminated sites are identified that the Council owns and/or where the Council is the polluter, then the Council will be responsible for sourcing funding from its own budget to investigate and remediate such sites where it is demonstrated that potentially significant pollution impacts have occurred or are occurring. There could be a significant cost implication in undertaking such work.

Routine inspection and re-assessment of council owned land will occur to ensure that they continue to NOT present an unacceptable contamination risk to occupiers or nearby receptors such as watercourses or ecological systems.

References and Resources

[Contaminated Land Statutory Guidance 2012](#)

This document replaced Defra Circular 01/2006 and now addresses contaminated land excluding radioactively contaminated land.

[Environment Agency](#)

The land contamination pages on the Environment Agency website provide a useful source of information on land contamination assessment.

[National Planning Policy Framework](#) (revised)

Sets out the government's planning policies (including those for contaminated land) and how these are expected to be applied.

[Environmental Protection Act 1990](#)

The contaminated land regime is set out in Part 2A of the Environmental Protection Act 1990.

General Guidance

<https://www.gov.uk/contaminated-land>

Appendix 1 - Process for Identifying sites for Detailed Inspection

The inspection and remediation of contaminated land is a progressive activity. The council identifies areas and/or sites through the strategic inspection process where a more detailed study may be required. The process for identifying and prioritising sites has been developed using a GIS based site prioritisation tool.

In summary, for contaminated land to be identified the following are pre-requisites:

- One or more contaminant substances present, and;
- One or more specified receptors present, and;
- At least one plausible pathway between contaminant and receptor, (suggesting a contaminant linkage exists) and;
- A likelihood that the contaminant linkage will result in significant harm to one of the specified receptors or, the significant pollution of controlled waters.

Strategic Inspection

It is a requirement of the strategy that potentially contaminated land shall, prior to detailed investigation, be listed and categorised according to a preliminary assessment of risk. The method used is based on that described in DETR Contaminated Land Research Report 6, 'Prioritisation & Categorisation Procedure for sites which may be Contaminated' (CLR 6). This is to ensure all further investigative work relates directly to seriousness of the potential risk and therefore the most pressing problems are identified and quantified first. CLR 6 has four Priority Categories which assist in the prioritisation process. These are outlined in the table below.

The Environment Agency will be consulted in respect to the priorities concerning controlled waters. Likewise Natural England and others who have specific interest will be consulted on ecologically significant issues.

| | |
|----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Priority Category 1 | Site likely not to be suitable for present use and environmental setting. Contaminants probably or certainly present and very likely to have an unacceptable impact on key targets. Urgent assessment action needed in the short term. |
| Priority Category 2 | Site may not be suitable for present use and environmental setting. Contaminants probably or certainly present and likely to have an unacceptable impact on key targets. Assessment action needed in the medium term. |
| Priority Category 3 | Site considered suitable for present use and environmental setting. Contaminants may be present but unlikely to have an unacceptable impact on key targets. Assessment action unlikely to be needed whilst the site remains in present use or otherwise remains undisturbed. |
| Priority Category 4 | Site considered suitable for present use and environmental setting. Contaminants may be present but very unlikely to have an unacceptable impact on key targets. No assessment action needed while site remains in present use or undisturbed. |

This preliminary risk assessment process seeks to identify contaminant-pathway-receptor linkages. Initial research may identify sites where either particular contaminants are likely or known to exist, or sensitive receptors are known to exist. No on-site assessment will be undertaken unless both are suspected or confirmed. Where evidence is inconclusive the situation will be kept under review.

As Priority Category 1 sites are likely not to be suitable for their present use, these will be investigated as soon as possible after they are identified.

It must be understood that the assessments at this preliminary stage are made on a limited amount of incomplete basic data and information, such as old surveys, maps, geological information and previous site investigation information where available etc. As more knowledge of the site is obtained, these assessments are revised and their Priority Category may change. The assessment of a site as Priority Category 1 does not necessarily infer the existence of a significant risk to one of the specified receptors.

Detailed Inspection

Where evaluation of all available data suggests a significant contaminant linkage may exist, a requirement to consider determination of a site or part of a site as contaminated land under Part2A may exist. The statutory guidance is the principle point of reference in this regard.

Following the strategic inspection process, sites can become candidates for detailed inspection. In every case a detailed inspection is carried out by a, “suitable person”, adequately qualified to undertake the work. Discretion is used at all times to minimise the effect on occupiers of the land.

To ensure the most appropriate technical procedures are employed the Council will have regard to the most up to date guidance available. Reference will be made to the CIRIA series and the CLR documents and the BS Code of Practice for Site investigation. In particular, if contractors or consultants are appointed they should be quality assured and have appropriate Professional Indemnity Insurance.

Determining if land is contaminated

There are four possible grounds for determining if land is contaminated:

1. Significant harm is being caused,
2. There is a significant possibility of significant harm being caused,
3. Significant Pollution of controlled waters is being caused,
4. Significant Pollution of controlled waters is likely to be caused.

In making any determination the Council will take all relevant information into account, carry out appropriate scientific assessments, and act in accordance with the statutory guidance and its categorising principles. The determination will identify all three elements of a contaminant linkage and explain their significance.

Once an area of land has been determined as likely to be contaminated land by statutory definition, the Council will prepare a Risk Summary as required by the statutory guidance.

The Council will then formally notify in writing all relevant parties that the land has been declared contaminated, these include:

- the owner(s),
- the occupier(s),
- those liable for remediation ('appropriate persons' in the statutory guidance),
- the Environment Agency who maintain a National database.

Maintaining the public register

Should land be determined as "Contaminated Land" a remediation strategy should be agreed and the details must be entered onto Oxford City Council's [Contaminated Land Register](#).

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Appendix 2: Land Quality Strategy 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 |
| Financial | New information indicating significant possibility of significant harm received. OCC responsible for investigating the land to determine if it is "Contaminated Land" | T | Responsibilities of Local Authority under Part 2A of the EPA 1990. | Oxford City Council may need to fund all or part fund investigation and remediation and communicate carefully if the appropriate person cannot be identified. | 20.10.2025 | PS | 3 | 1 | 3 | 1 | 3 | 1 | | Accept the Risk | | | | |
| Financial, Reputational and Physical | Oxford City Council identified as the "appropriate person" (as defined in Defra's Contaminated Land Statutory Guidance 2012). ie. City Council liable for remediation costs etc. | T | New information received indicating that historic contamination is causing significant harm, land is investigated and determined as "Contaminated Land" under the Environmental Protection Act 1990. | Oxford City Council would need to fund investigation and remediation and communicate carefully. | 20.10.2025 | PS | 3 | 2 | 3 | 2 | 3 | 2 | | Accept the Risk | | | | |
| Financial | Oxford City Council is not the "appropriate person" but still incurs costs due to hardship assessment. | T | New information received indicating that historic contamination is causing significant possibility of significant harm, land is investigated and determined as "Contaminated Land" under the Environmental Protection Act 1990. | Oxford City Council would need to fund or part fund investigation and remediation and communicate carefully. | 20.10.2025 | PS | 3 | 1 | 3 | 1 | 3 | 1 | | Accept the Risk | | | | |
| Reputational | Council fails to "lead by example" | T | Poor planning/ poor management/ lack of communication between departments. | Damage to Council standing. | 20.10.2025 | PS | 2 | 2 | 2 | 2 | 2 | 1 | | Reduce the Risk | | | | |
| Reputational/ Physical | Investigation and remediation through the planning process is not properly monitored or enforced through the planning process. | T | Lack of resource in planning department to monitor and enforce planning conditions etc. | Damage to Council standing. Potential risk to public health/environment. | 20.10.2025 | PS | 4 | 3 | 4 | 3 | 4 | 2 | | Reduce the Risk | | | | |
| Reputational/ Physical | Investigation causes property blight | T | Investigation not managed properly by the Council. Poor communication. | Damage to Council standing. Damage to local economy and local communities. | 20.10.2025 | PS | 4 | 2 | 4 | 2 | 4 | 1 | | Reduce the Risk | | | | |
| Reputational/ Physical | Land quality data not managed efficiently | T | Resources for internal contaminated land work reduced and/or processes not followed. | Inability for the Council to control management of contaminated land through planning and meet Land Quality Strategy objectives. | 20.10.2025 | PS | 4 | 2 | 4 | 2 | 4 | 1 | | Reduce the Risk | | | | |

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To: Cabinet
Date: 19 November 2025
Report of: Group Finance Director
Title of Report: Treasury Management Annual Report 2024/25

| Summary and recommendations | |
|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Decision being taken: | The report sets out the Council's Treasury Management activity and performance for the financial year 2024/25, (including any prudential borrowing limits which are in line with the capital programme and proposed financing), in line with requirements from CIPFA's code of practice. |
| Key decision: | No |
| Cabinet Member: | Councillor Ed Turner (Cabinet Member for Finance and Assets) |
| Corporate Priority: | All |
| Policy Framework: | Treasury Management Strategy |

Recommendation(s): That Cabinet resolves to:

- Note the Treasury Management Annual Report for 2024/25 and the Council's compliance with the Prudential and Treasury Indicators.**

| Appendix No. | Appendix Title | Exempt from Publication |
|--------------|----------------|-------------------------|
| Appendix 1 | Risk Register | 1. No |

Introduction and background

- The primary principle governing the Council's investment decisions is the security of the investment, with liquidity and yield being secondary considerations.
- The Council has a statutory duty to set, monitor and report on its prudential indicators in accordance with the Prudential Code, which aims to ensure that the capital investment plans of local authorities are affordable, prudent and sustainable.
- When considering whether to borrow, the Council's Debt Strategy requires a number of factors to be considered. These include:

- prevailing interest rates;
 - the profile of the Council's debt portfolio;
 - the type of asset being financed; and
 - the availability of cash balances to finance capital expenditure.
4. The Council fully complied with its Treasury Management Strategy in relation to both debt and investment management in 2024/25.
 5. The prudential indicators detailed in the body of this report compare the Council's outturn position against the target set for 2024/25

Executive Summary

6. The Council held investments of £19.349 million (based on the investment value) as at 31st March 2025. Net interest earned during the year, including from loans to the Council's companies and external borrowing, was a net £4.21 million against a target of £4.96 million, an adverse variance of £0.75 million. This is due to the use of internal borrowing. The overall outturn position for treasury transactions during the year was a favourable variance of £2.63 million. The position for the general fund can be broken down as follows:

Favourable

- Borrowing costs lower by £1.52 million due to long term borrowing on the General Fund not being required, following slippage in the capital programme including lower loan requirements from the Council's housing companies.
- £0.77 million interest charged to the Housing Revenue Account (HRA) in lieu of external borrowing
- £0.50 million lower payment to the HRA for cash balances due to the use of HRA balances being used for capital financing before borrowing
- Minimum Revenue Provision charges lower by £0.59 million due to lower general fund borrowing and only financing repayable loans or schemes with a long life from borrowing;

Adverse

- £0.61 million lower interest income from the Council's companies due to slippage in loans to the Council's housing development company and the Barton Properties now transferring into the HRA
 - £0.14 million less general investment interest due to lower cash balances following the use of resources for internal borrowing
7. The average rate of return on the Council's investments in 2024/25 was 4.97% compared to 4.52% in 2023/24. The Bank of England base Rate decreased steadily in the later part of 2024/25, starting at 5.25% and finishing at 4.50%.
 8. The Council held £288.528 million of fixed rate Public Works Loan Board (PWLB) debt as at 31st March 2024. £198.528 million was originally borrowed in March 2012 to fund the self-financing of the HRA with one of the loans that had matured being replaced on 28th March 2022. Additional debt was taken out in 2023/24 of £20 million and an additional £70 million has been borrowed in 2024/25 to replace internal borrowing taken out by the HRA in order to replace cashflow resources. All of the debt relates to the Council's housing function and the maturity profile ranges

from 5 to 50 years. Interest paid on the debt in 2024/25 and charged to the HRA was £6.40 million.

Financing the Capital Programme 2024/25

9. Table 1 below shows actual capital expenditure and expected financing compared to the original budget.

| Table 1 Capital Expenditure and Financing 2024-25 | | | |
|----------------------------------------------------------|--------------------------------------------------|-------------------------------------|----------------------------|
| Capital Expenditure | 2024/25 Original Budget £'000 | 2024/25 Actual £'000 | Variation £'000 |
| Commercial investments | 0 | 0 | 0 |
| Service Investments | 17,802 | 6,002 | -11,800 |
| Other General Fund | 59,662 | 33,669 | -25,993 |
| HRA | 158,255 | 105,678 | -52,577 |
| Total Capital Expenditure | 235,719 | 145,349 | -90,370 |
| Resourced by: | | | |
| Developer Contributions | 7,973 | 7,633 | -340 |
| Capital Grants and contributions | 13,734 | 16,974 | 3,240 |
| Capital Receipts | 24,324 | 24,509 | 185 |
| Revenue | 12,367 | 3,677 | -8,690 |
| Major Repairs Reserve | 9,901 | 12,030 | 2,129 |
| Prudential Borrowing | 167,420 | 80,526 | -86,894 |
| Total Capital Resources | 235,719 | 145,349 | -90,370 |

10. Much of the variation to the original budget relates to slippage in the programme, the resources for which will be moved into funding the expenditure in future financial years.

The Council's Overall Borrowing Need

11. The Council's underlying need to borrow, or Capital Financing Requirement (CFR), is the measurement and control of the Council's overall debt position. It represents all prior years' net capital expenditure which has not been financed by other means, i.e. revenue, capital receipts, grants etc.
12. The CFR can be reduced by:
- The application of additional capital resources, such as unapplied capital receipts;
 - Repayment of debt financed by borrowing (including repayment of capital debtors); or
 - Charging a Minimum Revenue Provision (MRP), or a Voluntary Revenue Provision (VRP).
13. Table 2 below shows the Council's CFR as at the 31st March 2025, this is a key prudential indicator, and shows that actual borrowing is below the CFR:

| Table 2 Capital Financing Requirement (CFR) 2024-25 Estimate and Actual | | | |
|--------------------------------------------------------------------------------|---------------------------------------------------|-------------------------------------------------|----------------------------|
| CFR | 31st March 2025 Estimate £'000 | 31st March 2025 Actual £'000 | Variation £'000 |
| Opening Balance | 393,980 | 342,752 | -51,228 |
| Prudential Borrowing | 167,420 | 80,526 | -86,894 |
| Repayment of debt | -6,436 | -32,003 | -25,567 |
| Minimum Revenue Provision | -660 | -154.00 | 506 |
| CFR Closing Balance | 554,304 | 391,121 | -163,183 |
| External Borrowing | 364,358 | 288,528 | -75,830 |
| Internal Borrowing | 189,946 | 102,593 | -87,353 |

14. New external debt of £70 million was taken out during 2024/25 in relation to HRA capital financing and as at 31st March 2025 the Council's total external debt is now £288.528 million, all in relation to the HRA. This is below the CFR and indicates that the Council continues to internally borrow from its cash balances which is the cheapest form of borrowing.

Treasury Position at 31st March 2025

15. Whilst the Council's gauge of its underlying need to borrow is the CFR, the treasury function manages the Council's actual need to borrow by either:

- Borrowing to the CFR;
- Choosing to utilise temporary cash flow funds, instead of borrowing (known as "under borrowing"); or
- Borrowing for future increases in the CFR that are reasonably certain

16. The Council's treasury position as at the 31st March 2025 for both debt and investments, compared with the previous year is set out in Table 3 below:

| Table 3 : Borrowing and Investments 2023-24 and 2024-25 | | | | |
|---------------------------------------------------------|--------------------|-------------------------------|--------------------|-------------------------------|
| Treasury Position | 31st March 2024 | | 31st March 2025 | |
| | Principal £'000 | Rate as at 31st March % | Principal £'000 | Rate as at 31st March % |
| Borrowing | | | | |
| Fixed Interest Rate Debt | 218,528 | 3.41 | 288,528 | 3.84 |
| Total Debt | 218,528 | 3.41 | 288,528 | 3.84 |
| Investments | | | | |
| Fixed Interest Investments | 0 | 0.00 | 0 | 0.00 |
| Call Accounts | 0 | 0.00 | 0 | 0.00 |
| Variable Interest Investments | 330 | 5.28 | 5,530 | 4.51 |
| Property Funds | 20,000 | 4.58 | 13,819 | 5.13 |
| Total Investments | 20,330 | 4.93 | 19,349 | 4.82 |
| Net Position | 198,198 | | 269,179 | |

17. Overall, the Council earned a weighted average return of 4.97% on its investment which is higher than our internal target of 0.1% above the average bank base rate of a weighted average of 4.75% in the year to 31st March 2025.

Prudential Indicators and Compliance Issues

18. Some of the prudential indicators provide an overview, others a specific limit on treasury activity. These are detailed below:

19. **Net Borrowing and the CFR** – In order to ensure that borrowing levels are prudent, the Council's external borrowing (net of investments) over the medium-term must only be for a capital purpose, and not exceed the CFR except in the short-term. In the short term the Council can borrow for cash flow purposes. Table 4 below highlights the Council's net borrowing position against the CFR, and shows that it is significantly below the limit, due to the level of internal borrowing that has been undertaken.

| Table 4 : Net Borrowing CFR 2023-24 and 2024-25 | | |
|-------------------------------------------------|-----------------|-----------------|
| Net Borrowing & CFR | 31st March | 31st March |
| | 2024 | 2025 |
| | Actual £'000 | Actual £'000 |
| Total Debt | 218,528 | 288,528 |
| Total Investment | 20,330 | 19,349 |
| Net Borrowing Position | 198,198 | 269,179 |
| CFR | 342,752 | 391,121 |
| Under Borrowing plus Investments | 144,554 | 121,942 |

20. In the current climate, internal borrowing is still preferable to borrowing externally as the interest rate payable on an external loan is much higher than that which can be earned on investments. Therefore, forfeiting interest receivable on investments is more economical than paying additional interest charges for new external debt. If the net borrowing position, interest rate position and/or CFR changed significantly, the prospect of taking on additional debt would be reviewed.

21. **The Authorised Limit** – The Authorised Limit is the ‘affordable borrowing limit’ required by section 3 of the Local Government Act 2003. The Council does not have the power to borrow above this level unless it explicitly agrees to do so. Table 5 below demonstrates that during 2024/25 the Council’s gross borrowing was within its Authorised Limit. The Authorised Limit allows for some headroom above the Council’s projected CFR.

| Table 5 : Authorised Lending Limits 2023-24 and 2024-25 | | | | |
|----------------------------------------------------------------|------------------------|----------------|------------------------|----------------|
| Authorised Limit compared to Actual Borrowing | 31st March 2024 | | 31st March 2025 | |
| | Limit | Actual | Limit | Actual |
| | £'000 | £'000 | £'000 | £'000 |
| Borrowing | 815,820 | 218,528 | 944,287 | 288,528 |
| Other Long Term Liabilities | 0 | 0 | 0 | 0 |
| Total Borrowed | 815,820 | 218,528 | 944,287 | 288,528 |
| Amount under Limit | 597,292 | | 655,759 | |

22. **The Operational Boundary Limit** – the Operational Boundary Limit is the expected borrowing position of the Council during the year. It is possible to exceed the Operational Boundary Limit, for a short period of time, providing that the Authorised Borrowing Limit is not breached. Table 6 below shows the limits for the last two financial years. Actual borrowing increased by £70 million to £288.5m but the limits were not breached during either period.

| Table 6 : Operational Boundary Limits 2023-24 and 2024-25 | | |
|------------------------------------------------------------------|------------------------|------------------------|
| Operational Boundaries | 31st March 2024 | 31st March 2025 |
| | £'000 | £'000 |
| Operational Borrowing Limit | 499,685 | 574,304 |
| Other Long Term Liabilities | 0 | 0 |
| Totals | 499,685 | 574,304 |

Investment Income

23. High inflation put pressure on the Bank of England to increase the interest rate to reduce the rate of inflation. The rate rose to a peak of 5.25% and was not reduced until 1st August 2024 to 5.0%. The Council manages its investments in-house and invests with institutions listed in the Council’s approved counterparty list. The Council generally invests for a range of periods from overnight to 364 days, dependant on cash flow requirements and its view on interest rates and duration limits set out in the Council’s Investment Strategy which is within the Treasury Management Strategy 2024/25. Due to the use of internal resources to internally borrow to fund the capital programme, most of the council’s balances are invested in money market funds which are instant call.

24. During 2024/25, the Council maintained an average investment balance of £34.1m million and received a weighted average return of 4.97%. The upper limit of non-specified investments allowed in the strategy is 25% of the average investment balance for the preceding calendar year or £25 million, whichever is the higher. The average balance for 2023/4 was £59.7 million giving a limit on non-specified investments of £25 million. Property funds and Multi Asset Funds fall into the non-specified investment category; their original investment value was £20 million which is within the non-specified limit of £25m Limit
25. The property funds and the Multi asset Funds are classified as Non-specified Investments within the approved Investment Strategy. The weighted average rate of return on the pooled investments in the year to 31st March 2025 was circa 4.92% per annum.
26. The capital value of the Communities, Churches and Local Authorities (CCLA) Fund has increased by 22.61% between April 2013 and March 2025. The Lothbury investment has been closed and we are receiving capital repayments back as assets are disposed of. As at the 31st March 2025, £6.181 million of our initial £7 million investment had been redeemed at a value of £5.427 million, a loss of £0.754 million on the initial investment value. It is estimate that there will be a £0.854 million capital loss overall once all of the remaining funds are returned. This is mitigated by an earmarked reserve being held to cover this risk. It should also be noted that the Lothbury Property Fund investment has returned £2.16 million which is around £0.8 million above the prevailing interest rate.
27. Two Multi Asset Funds each for the amount of £5m are held with two fund managers, Fidelity and Artemis. The values as at 31st March 2025 were £4.00 million and £5.67 million respectively. The position on both continues to fluctuate. As with the property funds any gains or losses should be considered over the long term. Aggregate Multi Asset Fund Investment value is currently approximately 3.2% lower than the original investment amount. It is expected that this will improve as bank interest rates fall further.
28. Fund managers are reporting that the funds continue to deliver stable income in line with objectives. Yields across asset classes have risen materially and have been incorporating higher yield investments- in the fund, which will remain the focus over the coming months. The funds are well positioned to continue to deliver objectives of a stable yield of around 4-6% per annum over a market cycle.
29. Treasury investment income for 2024/25 was £1.41 million; £0.14 million lower than the estimate of £1.55 million. This has to be seen in context of the overall treasury management activity due to internal borrowing replacing external investment resulting in savings in borrowing costs. Overall, the treasury activity in 2024/25 resulted in a favourable variance to budget of £2.6 million which is broken down in paragraph 1 of this report.
30. Fluctuations in the Council's balances have been managed through a mix of instant access and notice accounts, money market funds and short term deposits (up to 364 days). This approach is in line with the Investment Strategy approved by the Council.

Other Loans

31. The Council currently have non treasury loans to its Oxford City Housing group of companies (known as OxPlace) of £8.4 million with interest rates varying in line with

PWLB rates plus a subsidy control markup and £13.54 million to Oxwed LLP with an interest rate up to the end of 2024/25 of 6.5% per annum. There are also 2 loans with the Low Carbon Hub of £1.80 million with an interest rate of 2.85% and £1.82 million with an interest rate of 1.45%.

Treasury Advisers

32. The Council takes advice from MUFG (previously Link Asset Services) on the appropriate durations to place investments with counterparties. These durations and also the availability of individual counterparties are subject to change dependant on market conditions and the credit ratings of the individual institutions. This means that the investment portfolio has to be actively managed to ensure both the availability of enough suitable counterparties and that the Council achieves the best interest rates possible within the agreed security and liquidity parameters.

Interest Rates since 31st March 2025 and forecasts

33. Interest rates have been falling through 2024/25 finishing at a 4.5% base rate at the end of the year and forecasts suggested further gradual falls in short, medium and longer-term rates during 2025/26 and onwards. The current base rate is 4%.
34. The Consumer Price Index (CPI) measure of inflation was 3.8% in September 2025 and is expected to fall back to 2.1% over time.
35. The Council continues to use money market funds and instant access accounts for liquidity purposes, whilst seeking to maximise its returns by arranging longer term deposits where possible, it is vital to maintain a robust cash-flow model which is continuously reviewed and updated.

Environmental Social and Governance (ESG)

36. The Council adopted an ethical investment policy in 2015/16. No changes were made to the policy in setting the 2024/25 Treasury Management Strategy which is set out below:

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:

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

37. The Council set a separate ESG policy within the 2023/24 Treasury Strategy which was then updated in the 2024/25 Treasury Strategy. ESG criteria are a set of measures of a company's operations that socially conscious investors can use to inform potential investments. Environmental criteria consider how a company performs as a steward of nature. Social criteria examine how it manages relationships with employees, suppliers, customers, and the communities where it operates. Governance deals with a company's leadership, executive pay, audits, internal controls, and shareholder rights. Due to the number of different agencies producing ESG data, which are not comparable between the agencies because of

the different methodologies used, the Council is limited on how this information can be used to inform investment decisions. Due to the focus that has to be placed on the treasury management principles of Security, Liquidity and Yield, caution needs to be applied in order to not restrict the number of counterparties that the Council can invest in such that there is no remaining capacity for further investments or so that the level of interest income is not significantly affected which would cause unexpected financial pressure on the Council. However, the Council does monitor the activities of its various counterparties and questions and challenges them on their ESG credentials at any meeting held with them.

Financial implications

38. These are set out within the body of the report.

Legal Issues

39. The Council is required by regulations issued under the Local Government Act 2003 specifically the Local Authorities (Capital Finance and Accounting) (England) Regulations 2003 and guidance from CIPFA, to produce an annual treasury management review of activities and the actual prudential and treasury indicators for 2024/25. This report meets the requirements of both the CIPFA Code of Practice on Treasury Management (2021) (the Code), and the CIPFA Prudential Code for Capital Finance in Local Authorities, (the Prudential Code).

Level of risk

40. The risk register is attached at Appendix 1.

Equalities impact

41. The Council follows an ethical investment policy, investment interest helps provide council services, which has a beneficial equalities impact.

| | |
|----------------------------|----------------------------------------------------------------|
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Risk Register
Treasury Management
As at: 1 August 2024

| Ref | Title | Risk description | Risk | | Consequence | Date Raised | Owner | Gross | | Current | | Target | | Comments | Controls | | Status | Progress | Action Owner |
|---------------------|-------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------|-------------|--------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|------------|-------|---|---------|---|--------|---|----------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|---------|----------|--------------|
| | | | Opp/ threat | Cause | | | | I | P | I | P | I | P | | Control description | Due date | | | |
| Treasury Management | | | | | | | | | | | | | | | | | | | |
| 1 | Loss of capital investment due to a counterparty collapsing | The Council loses its principal investment or an investment becomes impaired. | T | 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 | 05/08/16 | Bill Lewis | 5 | 3 | 5 | 3 | 5 | 3 | | 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. | Ongoing | Ongoing | 100% | Bill Lewis |
| 2 | Pooled fund investments lose value | The value of the Council's units held in pooled fund investments decreases. | T | Uncertainty in the commercial property market and investment markets following Brexit, Covid and slowdown in general economic activity. | Capital depreciation will decrease the overall value of the investment. | 05/08/16 | Bill Lewis | 4 | 3 | 3 | 3 | 3 | 2 | | The Council receives monthly valuations from the 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. | Ongoing | Ongoing | 100% | Bill Lewis |
| 3 | Changes in interest rates | Interest rates continue to change affecting investment and borrowing rates. | T | Changing national and global economic conditions resulting in interest rates being higher or lower than anticipated | The Council may not achieve its target level of interest income; the Council may lock in to fixed term investments with the interest rate subsequently rising; or the Council may take out borrowing at higher rates than subsequently achievable. | 15/10/22 | Bill Lewis | 3 | 4 | 3 | 4 | 3 | 4 | | The Council continually monitors base rates and projection of rates from its treasury advisors and general economic data and plans investments accordingly. The same approach is taken for planning borrowing by monitoring forecasts against the different rates of interest offered for different periods and loans are then planned accordingly. | Ongoing | Ongoing | 100% | Bill Lewis |
| 4 | Fraudulent activity | Potential fraud by staff | T | Fraudulent activity | Loss of money for the Council Disciplinary action for the staff involved | 05/08/16 | Bill Lewis | 3 | 3 | 2 | 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. | Ongoing | Ongoing | 100% | Bill Lewis |
| 5 | Money laundering | Money laundering by external parties | T | External parties pay a transaction by cash and subsequently request a refund | Fine and/or imprisonment | 05/08/16 | Bill Lewis | 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 | Ongoing | Ongoing | 100% | Bill Lewis |
| 6 | Network failure/Barclays.net being inaccessible | The Council is unable to carry out its daily treasury functions due to a network failure | T | Barclays.net is unavailable or the Council's network has failed | Daily Treasury functions will not be carried out | 05/08/16 | Bill Lewis | 2 | 3 | 1 | 2 | 1 | 2 | | Invoke the business continuity plan to minimise the effects of a network issue. | Ongoing | Ongoing | 100% | Bill Lewis |
| 7 | Revenue Budgets | Revenue budgets are unable to meet borrowing costs of capital schemes | T | 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. | 05/08/16 | Bill Lewis | 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. | Ongoing | Ongoing | 100% | Bill Lewis |
| 8 | Lack of suitable counterparties | The Council does not have enough "space" with approved counterparties to place investments/deposit surplus cash balances. | T | Rising cash balances and a restricted counterparty list | Use of counterparties not paying best value rates. | 05/08/16 | Bill Lewis | 3 | 4 | 3 | 3 | 3 | 3 | | 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. | Ongoing | Ongoing | 100% | Bill Lewis |
| 9 | Environmental Social and Governance | Inability to place investments | T | Environmental Social and Governance factors not being compatible with the Security Liquidity and Yield principles; limiting counterparties | Inability to find satisfactory counterparties to take all of the investments | 10/01/23 | Bill Lewis | 3 | 4 | 3 | 3 | 3 | 3 | | Environmental Social and Governance factors are being used as an overlay in order to not restrict counterparties. These will be used as a means to select counterparty where there is more than one available. | Ongoing | Ongoing | 100% | Bill Lewis |
| 10 | Staff Resource | Staff capacity issue | T | Additional CIFPA requirements on treasury management increases pressure on staff; training, additional reporting, etc | Reports not produced to comply fully with the code | 10/01/23 | Bill Lewis | 3 | 4 | 3 | 3 | 3 | 3 | | Reporting will be undertaken at a reasonable level to include reporting on indicators that can be measured during the year. | Ongoing | Ongoing | 100% | Bill Lewis |

Current Risk Score

This is the risk score at the time that the risk is reviewed. When the risk is first identified it will be the same as the gross risk score. The current risk score is tracked to ensure that progress is being made to manage the risk and reduce the Council's exposure.

Residual Risk Score

This is the risk score after mitigating actions have taken place. The residual risk score shows how effective your action plans are at managing the risk.

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