

Extraordinary Cabinet



Forest Heath
District Council

Title:	Agenda																				
Date:	Tuesday 17 March 2015																				
Time:	<p>5.30 pm Public Speaking Prior to the start of the informal discussions, members of the public are invited to put questions/statements of not more than 3 minutes duration relating to items to be discussed in Part 1 of the agenda only.</p> <p>5.30 pm Informal discussions with St Edmundsbury Borough Council's Cabinet on the two substantive items listed below under Items 3. to 4., to be held in the Council Chamber.</p> <p>5.45 pm The formal meeting of the Cabinet will commence at 5.45 pm or immediately following the conclusion of the informal discussions, whichever is the later, in the Council Chamber.</p>																				
Venue:	<p>Council Chamber District Offices College Heath Road Mildenhall</p>																				
Membership:	<table> <tr> <td>Leader</td> <td>James Waters</td> </tr> <tr> <td>Deputy Leader</td> <td>Nigel Roman</td> </tr> <tr> <td>Councillor</td> <td>Portfolio</td> </tr> <tr> <td>David Bowman</td> <td>Economic Development and Tourism</td> </tr> <tr> <td>Rona Burt</td> <td>Planning, Housing and Transport</td> </tr> <tr> <td>Stephen Edwards</td> <td>Resources, Governance and Performance</td> </tr> <tr> <td>Warwick Hirst</td> <td>Health, Leisure and Culture</td> </tr> <tr> <td>Robin Millar</td> <td>Families and Communities</td> </tr> <tr> <td>Nigel Roman</td> <td>Deputy Leader/Environment and Waste</td> </tr> <tr> <td>James Waters</td> <td>Leader</td> </tr> </table>	Leader	James Waters	Deputy Leader	Nigel Roman	Councillor	Portfolio	David Bowman	Economic Development and Tourism	Rona Burt	Planning, Housing and Transport	Stephen Edwards	Resources, Governance and Performance	Warwick Hirst	Health, Leisure and Culture	Robin Millar	Families and Communities	Nigel Roman	Deputy Leader/Environment and Waste	James Waters	Leader
Leader	James Waters																				
Deputy Leader	Nigel Roman																				
Councillor	Portfolio																				
David Bowman	Economic Development and Tourism																				
Rona Burt	Planning, Housing and Transport																				
Stephen Edwards	Resources, Governance and Performance																				
Warwick Hirst	Health, Leisure and Culture																				
Robin Millar	Families and Communities																				
Nigel Roman	Deputy Leader/Environment and Waste																				
James Waters	Leader																				
Interests – Declaration and Restriction on Participation:	Members are reminded of their responsibility to declare any disclosable pecuniary interest not entered in the Authority's register or local non pecuniary interest which they have in any item of business on the agenda (subject to the exception for sensitive information) and to leave the meeting prior to																				

	discussion and voting on an item in which they have a disclosable pecuniary interest.
Quorum:	Three Members
Committee administrator:	Sharon Turner FHDC Cabinet Officer/Committee Administrator Tel: 01638 719237 Email: sharon.turner@westsuffolk.gov.uk

Procedural Matters

All Members of St Edmundsbury Borough Council's Cabinet will be in attendance to enable informal discussions on the reports listed in Items 3. to 4. inclusive below to take place between the two authorities:

Councillors:

Terry Clements
Anne Gower
John Griffiths
Sara Mildmay-White

Portfolios:

- Planning and Regulation
- Housing
- Leader
- Deputy Leader
Health and Communities
- Economic Growth
- Resources and Performance
- Leisure, Culture and Heritage
- Waste and Property

QUORUM: Three Members

On the conclusion of the informal joint discussions, the Cabinet will hold its formal meeting as follows:

Part 1 - Public

1. Apologies for Absence

2. Public Participation

(This item will be undertaken at the beginning of the informal discussions, to allow Members to consider the issues raised by the members of the public)

3. West Suffolk Annual Report 2014/2015

1 - 44

Report No: **CAB/FH/15/015**

Cabinet Member: James Waters

Lead Officer: Davina Howes

(For reference purposes, St Edmundsbury Borough Council's Report Number is CAB/SE/15/018)

4. Universal Credit Delivery Partnership Agreement

45 - 78

Report No: **CAB/FH/15/016**

Cabinet Member: Stephen Edwards

Lead Officer: Davina Howes

(For reference purposes, St Edmundsbury Borough Council's Report Number is CAB/SE/15/019)

5. Urgent Business

Such other business, which in the opinion of the Leader and as set out Paragraphs 15 and 16 of Part 4E of the Access to Information Rules, should be considered as a matter of urgency to be specified in the minutes.

Extraordinary Cabinet



Forest Heath
District Council

Title of Report:	West Suffolk Annual Report 2014/2015	
Report No:	CAB/FH/15/015	
Report to and date:	Extraordinary Cabinet	17 March 2015
Portfolio holder:	James Waters Leader of the Council Tel: 07771 621038 Email: james.waters@forest-heath.gov.uk	
Lead officer:	Davina Howes Head of Families and Communities Tel: 01284 757070 Email: davina.howes@westsuffolk.gov.uk	
Purpose of report:	The West Suffolk Annual Report highlights the key activities and developments that have been achieved over the financial year 2014-15, with regard to the priorities set out in the West Suffolk Strategic Plan 2014-16.	
Recommendation:	It is <u>RECOMMENDED</u> that the West Suffolk Annual Report 2014/15 be approved.	
Key Decision: (Check the appropriate box and delete all those that <u>do not</u> apply.)	<p><i>Is this a Key Decision and, if so, under which definition?</i></p> <p>Yes, it is a Key Decision - <input type="checkbox"/></p> <p>No, it is not a Key Decision - <input checked="" type="checkbox"/></p>	
<i>The decision made as a result of this report will be published within 48 hours and cannot be actioned until seven working days have elapsed. This item is included on the Decisions Plan.</i>		
Consultation:	<ul style="list-style-type: none"> The Annual Report summarises progress in achieving the priorities set out in the 2014-16 West Suffolk Strategic Plan which was informed by feedback from residents, business and stakeholders. 	
Alternative option(s):	<ul style="list-style-type: none"> It is good practice for councils to report on progress against their priorities in this way and ensures transparency on how they spend public money. Forest Heath and St Edmundsbury could report separately on their work to achieve their priorities. However, this would not reflect some of 	

		the excellent work which has been delivered jointly across the whole of West Suffolk. Also, it would not show the continued joint working between Forest Heath and St Edmundsbury.	
Implications:			
Are there any financial implications? <i>If yes, please give details</i>		Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	
Are there any staffing implications? <i>If yes, please give details</i>		Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	
Are there any ICT implications? <i>If yes, please give details</i>		Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	
Are there any legal and/or policy implications? <i>If yes, please give details</i>		Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	
Are there any equality implications? <i>If yes, please give details</i>		Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> <ul style="list-style-type: none"> The Annual Report covers evidence to support the achievement of the equality objectives from the Strategic Plan. 	
Risk/opportunity assessment:		None	
Risk area	Inherent level of risk (before controls)	Controls	Residual risk (after controls)
Misunderstanding of the role of the report (i.e. it can only give highlights of W Suffolk's activities, not every action taken).	very low	Develop a communications plan to clearly explain the role of the report	Negligible
Ward(s) affected:		All wards	
Background papers: <i>(all background papers are to be published on the website and a link included)</i>		West Suffolk Strategic Plan 2014-16 (http://westsuffolk.gov.uk/Council/Policies_Strategies_and_Plans/strategicplan.cfm)	
Documents attached:		Appendix A: West Suffolk Annual Report 2014-15	

1. Key issues and reasons for recommendation(s)

1.1 West Suffolk Annual Report 2014-15

- 1.1.1 The West Suffolk Annual Report highlights the key activities and developments that have been achieved over the financial year 2014-15, with regard to the priorities set out in the West Suffolk Strategic Plan 2014-16.
- 1.1.2 The Overview and Scrutiny Committee will consider the West Suffolk Annual Report after the Cabinet papers are issued for consideration at the Cabinet meeting on 17 March 2015. Therefore, any amendments recommended by Overview and Scrutiny Committee will be reported at the Cabinet meeting on 17 March 2015.
- 1.1.3 The final version of the report will be designed and include photographs to highlight our progress during the year. The report contains a number of case studies and examples from West Suffolk to illustrate the achievements described. These have been carefully drawn from a range of localities, urban vs rural locations, and service areas, in order to demonstrate the range of activities undertaken by the councils. In some cases, initiatives were only focused on one specific area, however, so examples are necessarily drawn from these localities.

This page is intentionally left blank

Forest Heath & St Edmundsbury councils



West Suffolk

working together

Annual Report

2014/15

Contents

Foreword from the Leaders of the councils	2
Introduction	3
A vision and priorities for West Suffolk 2014-16	4
Priority 1: Increased opportunities for economic growth	5
Priority 2: Resilient families and communities that are healthy and active	16
Priority 3: Homes for our communities	25
West Suffolk ways of working	32
The future	39

Foreword from the Leaders of the councils

This is the second joint annual report which Forest Heath and St Edmundsbury councils, working together as West Suffolk, have produced and it reflects a very busy year. For the first time both councils share a West Suffolk Strategic Plan which sets out the priorities to drive the way we work and allocate our resources from 2014-16.

Both councils regularly talk, and listen, to those who live and work in West Suffolk and these discussions, along with several shared meetings of councillors, helped us to develop a shared vision and three priorities. Our vision is:

“Working together, Forest Heath and St Edmundsbury councils will support communities to create the best possible future for people in West Suffolk.”

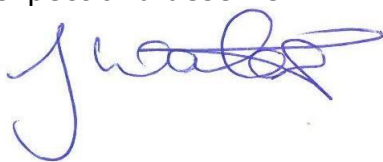
This vision is reflected in our annual report because what you will see is that we rarely work alone. The days when a single organisation such as a council can do everything it used to do – or in the same way that it always has – are long gone. The financial climate of today – and no doubt well into the future – means we all have to be much more innovative about services, whether in the way they are delivered and funded; or indeed whether they are still needed. Reducing the demand for all public, not just council, services would also be helpful to ensure we use taxpayers’ money in the best possible way. And that is why our vision is not just about our West Suffolk councils, but about helping our communities to help themselves, and those around them.

While we continue to deliver non-discretionary services (which are our legal duty), such as bin collections or making planning and licensing decisions, the three West Suffolk priorities (below) provide a focus for the rest of our budgets.

- Increased opportunities for economic growth.
- Resilient families and communities that are healthy and active.
- Homes for our communities.

You will see elsewhere in this report why we believe these should be our priorities when it comes to making decisions about where money is spent. They are about making sure we have the jobs, homes and all that needs to go with them to create strong, supportive communities who look out and care for each other. And although there are significant changes to the way Government funds us (we receive around half the revenue support grant that we had two years ago, for example) this has not stopped us from being extremely active as you will see within these pages.

There are undoubtedly challenges ahead but we will be better placed to face them with a strong West Suffolk partnership which influences those who have the power and money to invest locally and which listens to those who live and work here. The partnership also works well with others in the private, voluntary and public sectors to make every pound count and provide the services which our residents and businesses expect and deserve.



Councillor James Waters
Leader
Forest Heath District Council



Councillor John Griffiths
Leader
St Edmundsbury Borough Council

Introduction

In 2011 neighbouring Forest Heath District Council and St Edmundsbury Borough Council agreed to build on several years of informally sharing services by creating a West Suffolk partnership. This is designed to retain each council's individual identity while having a single staff team working across our boundaries (and beyond, through working with other partners). We started by appointing a Joint Chief Executive in 2012, then a Joint Leadership Team followed by a restructure in 2013 which resulted in every member of staff having the same terms and conditions.

The past year has seen further changes, which are outlined in this report along with the progress that the West Suffolk partnership of councils has made in delivering our shared vision and priorities.

The vision and priorities set out in the West Suffolk Strategic Plan are shown on the next page and a set of more specific actions is contained in the document itself, available at: www.westsuffolk/strategicplan

A vision and priorities for West Suffolk 2014-2016

Forest Heath and St Edmundsbury Councils have a joint Strategic Plan which sets out our vision, priorities and key actions for West Suffolk in 2014 -16

Our vision:

“Working together, Forest Heath and St Edmundsbury councils will support communities to create the best possible future for people in West Suffolk.”

Our priorities:

To help us deliver our vision we have developed priorities. They provide direction for focusing our efforts and resources in those areas which are the biggest priorities for West Suffolk over the next two years.

Priority 1 Increased opportunities for economic growth

We want to see:

1. beneficial growth that enhances prosperity and quality of life;
2. existing businesses that are thriving and new businesses brought to the area;
3. people with the educational attainment and skills needed in our local economy; and
4. vibrant, attractive and clean high streets, village centres and markets.

Priority 2 Resilient families and communities that are healthy and active.

We want to see:

1. a thriving voluntary sector and active communities who take the initiative to help the most vulnerable;
2. people playing a greater role in determining the future of their communities;
3. improved wellbeing, physical and mental health; and
4. accessible countryside and green spaces.

Priority 3 Homes for our communities

We want to see:

1. sufficient housing for current and future generations, including:
 - more affordable homes;
 - improvements to existing housing;
2. new developments that are fit for the future, properly supported by infrastructure, and that build communities, not just housing; and
3. homes that are flexible for people's changing needs.

Find out more at www.westsuffolk.gov.uk/strategicplan

Priority 1: Increased opportunities for economic growth

What we want to see:

1. growth that enhances prosperity and quality of life
2. existing businesses that are thriving and new businesses brought to the area;
3. people with the educational attainment and skills needed in our local economy; and
4. vibrant, attractive and clean high streets, village centres and markets

Why this was a priority for 2014/15

A strong local economy is essential as a basis for achieving all of West Suffolk's ambitions and priorities and for enhancing the prosperity and quality of life for our residents. West Suffolk has a relatively strong economy, but we still need to work hard to remain competitive to attract new enterprise to the area, expand into new sectors and make sure that the local economy offers employment opportunities for all. We also need to ensure that there is sufficient, appropriate housing for future generations to accommodate this growth (along with the schools, roads and other infrastructure that goes with it) which will be delivered through our planning policies.

What we have done to support this priority:

1. Create the right conditions for growth: transport connections, employment land allocations and supporting incubation

Having the transport infrastructure in place to secure economic growth is essential. This year has seen significant developments in terms of transport links in West Suffolk.

A11 Improvements and Fiveways redevelopment

In December 2014 we saw the opening of the long-awaited A11 improvements between the Fiveways roundabout at Barton Mills and Thetford. Over a number of years we had petitioned and lobbied for the dualling of this key stretch of road and the completion of the A11 represents a huge opportunity for our businesses to grow, particularly in our primary sectors of manufacturing, logistics and food production. The road improvements will also make our area more accessible for tourism, particularly for key developments such as the National Heritage Centre for Horseracing and Sporting Art which is due to open in Newmarket in 2016. We are now exploring how West Suffolk can benefit from the growth potential opened by the A11 corridor from Norwich to Cambridge.

We have been working with developers on the redevelopment of the former garage on the north side of the Fiveways roundabout. The £3 million project will include a Shell petrol station and a McDonald's drive-through restaurant – both of which have signed lettings agreements and is due for completion in spring 2015. Once completed the facility will create around 40 new jobs. The redevelopment was made possible after Forest Heath District Council and St Edmundsbury Borough Council helped the

developer to secure a £500,000 loan from the New Anglia Local Enterprise Partnership (LEP).

Eastern Relief Road

In September 2014 St Edmundsbury Borough Council agreed to invest £3 million to support the progression of the £15 million road (identified in the local plan Vision 2031 further details under Priority 3) which will link the east side of Bury St Edmunds and the Suffolk Business Park to Junction 45 of the A14 at the Rookery Crossroads. By acting commercially through investment in the relief road, we are also looking to ensure a return that presents value for money for our residents and taxpayers.

The £15 million cost of the project comes from contributions from the New Anglia Local Enterprise Partnership (£10 million) towards the relief road, Suffolk County Council (£2 million) and St Edmundsbury Borough Council (£3 million).

The commitment to the development of this road has a major impact on the potential for economic development in the area. The road will unlock a 68 hectare expansion of the Suffolk Business Park, a prime location next to the A14. The area will now have the potential to attract the head offices of major companies, creating 14,000 to 15,000 jobs over a 20 to 25 year period. It will also enable the delivery of a new secondary school, and 500 new homes, while bringing infrastructure improvements to the Moreton Hall area of Bury St Edmunds. It is envisaged that the road could be completed by September 2016.

Innovation centre at Haverhill Research Park

In July 2014 the Government approved a £2 million joint bid by the New Anglia and the Greater Cambridge Greater Peterborough Local Enterprise Partnerships working with the West Suffolk councils for the establishment of a £5.4 million innovation centre within the Haverhill Research Park, known as "the Epicentre".

The Epicentre which could be open as soon as September 2015, has the potential to deliver up to 2000 new jobs in Haverhill. It will comprise:

- high specification offices;
- research and development accommodation;
- conference and meeting rooms;
- training facilities;
- a work hub for shared working, allowing people to 'hot desk' by renting a desk for an hour, day, weekly or monthly;
- up to 52 individual office suites from 184 sq ft upwards; and
- a coffee shop.

West Suffolk Operational Hub

The Cabinets of the West Suffolk councils and Suffolk County Council have agreed to proceed with developing plans for a West Suffolk Operational Hub. The proposal would see Forest Heath, St Edmundsbury and Suffolk County Councils' public recycling, waste transfer and depot operations working on one site on the outskirts of Bury St Edmunds. If this project comes to fruition the benefits will include reduced costs, the current sites being released for redevelopment and new uses and the establishment of a modern facility fit for operational requirements with the capacity to respond to population and business growth. We will provide further updates on this development as the work progresses.

2. Build skills, attributes and employment opportunities through apprenticeship support, ensuring business skills needs are met

Improving educational attainment

West Suffolk supported Suffolk County Council's Raising the Bar initiative throughout 2014-15. Raising the Bar aims to develop skills, aspirations and attainment levels across the whole of Suffolk. Projects supported in Forest Heath and St Edmundsbury have included two pilot schemes to develop links between employers and schools at Mildenhall College Academy and Castle Manor Academy in Haverhill. It is proposed that this project will be rolled out to other school pyramids in West Suffolk over the next two years as it is extended across the whole of the county.

The councils have also worked throughout the year with colleagues at Suffolk County Council to develop a scheme to deliver an online portal for careers education, information, advice and guidance. This scheme gives local employers the opportunity to have contact, through the portal, with young people to provide information around careers and job opportunities. It is expected that this project will move into its delivery stage during the course of 2015.

We continue to liaise directly with local employers, the Chambers of Commerce and other business groups such as the Federation of Small Businesses, through the West Suffolk Business Forum. In this year, the forum has continued to provide an opportunity to discuss local issues relating to skills and apprenticeships and has also offered financial assistance to secondary and high schools in the area wishing to participate in the Young Enterprise Company Programme, a scheme that allows young people to experience what it is like to run a company for themselves.

Through all of this work, we have been fulfilling one of our 2014-16 equality objectives to ensure West Suffolk has '*people with the educational attainment and skills needed in our local economy*'.

Doing our bit as an employer

As a large employer in the area we have an important role to play in building skills and providing employment opportunities.

Working with West Suffolk College we now have 19 apprentices working in the organisation across all service areas. We are pleased to report that in this year, four apprentices have moved to established posts within the councils. We also offer a specific horticultural placement as part of a qualification delivered by Otley College. The apprentices receive advice and guidance from the learning and development team regarding their general training needs as well as support with their progression towards their qualification.

Working in collaboration with Suffolk County Council as part of the 'Rising High in Suffolk' initiative, we recruited four paid interns who worked with us for 12-weeks during the summer of 2014. The interns, who were second or third year university students, had placements across a range of service areas and worked on a number of projects. All of the interns gave feedback that their experience and time with us was highly valuable to their future careers. Based on the success of the 2014 programme, we are looking to provide 12 paid intern placements in the summer of 2015, working across a number of service areas within the organisation.

We are also working with staff to encourage personal development. We continue to promote apprenticeship qualifications for staff of all ages where available and where funding eligibility criteria are met. We currently have nine members of staff working towards NVQ qualifications in customer services, business administration and management.

We are also pleased to report that we have received a silver award from the Ministry of Defence Employer Recognition Scheme for being a good employer for recruiting reservists.

Case Study: Young entrepreneurs to showcase their talents on special markets

As part of the national promotion Love Your Local Market in May, the Bury St Edmunds and Haverhill markets offered young people a free stall to "road-test" their businesses.

Working with West Suffolk College, the special youth event was designed to help would-be traders aged 16-24 years old promote their enterprises. The stalls were free and people were able to sell anything – something they had made, a service they were promoting or things they had bought to sell on. The stall judged the best in Bury and Haverhill was also offered a free pitch for three months. As a result of this initiative one trader still has a stall on Haverhill market.

Stalls included:

- homemade jams, jellies and lemon curd;
- gifts, homewares;
- 'shabby chic' jewellery and accessories;
- purses, tea cosies and sachets filled with local lavender;
- colourful cushions; and
- recipe books and bags of herbs and spices for particular dishes.

The National Association of British Market Authorities (NABMA) held its annual conference and awards in Birmingham in January with St Edmundsbury named as winner in the Best Love Your Local Market event. The award was for both youth markets and a motor show on the Haverhill market, both of which were organised by St Edmundsbury Borough Council in conjunction with the town traders.

3. Engaging with businesses to support expansion

Small business grants

Since its introduction in 2011, the Forest Heath small business grant scheme has supported 30 start-up or new businesses. Three years on from the launch, a total of £43,000 has been invested, helping support the creation of 54 new jobs, and a collective turnover of around £2.1 million a year.

Building on this success the scheme was introduced in St Edmundsbury in July 2014, using funding from developer contributions. The scheme is administered on the councils' behalf by Suffolk enterprise agency Menta and enables new businesses, or

those still within their first year, subject to criteria, to apply for a grant of up to £1500. So far this year, nine grants have been awarded across West Suffolk.

On the wider skills agenda we continue to work with all the relevant delivery partners, such as West Suffolk College, other training providers, the county council, the two LEPs and (when appropriate) local schools to try and improve the aspirations and achievements of our residents and especially our young people. Our aim is to ensure that "lack of skills" is not something that holds back growth for our local businesses.

A key part of the Economic Development and Growth Team's Six Point Plan for Jobs and Growth is to encourage inward investment. With this in mind, an inward investment pack has been produced and was launched in February 2015 at the Hong Kong trade council business event. The pack, titled "West Suffolk business fact pack; promoting growth, relocation and start-ups", includes valuable information on lifestyle, education, housing, infrastructure, together with town profiles and business case studies – all to show potential investors that choosing West Suffolk is a sound business decision.

Closure of RAF Mildenhall and expansion of RAF Lakenheath

The US Government has announced its decision to close RAF Mildenhall while expanding RAF Lakenheath. We have been exploring the potential effects of this. These announcements will mean a change to the landscape of Forest Heath but we will look for opportunities for reinvention, growth and investment and that future plans for the bases are the right ones for local people. We will work with local businesses and local communities to help them prepare for, and adapt to, these changes.

Forest Heath has hosted a series of meetings to discuss the impact of the closure and residents, businesses, community groups and partners such as Suffolk County Council were invited to attend the meetings. Different meetings focused on the following three areas that would be impacted upon by the closure: housing, local communities and the economy, business and jobs.

Central government has created the "Mildenhall, Alconbury and Molesworth (MAM) Working Group" which we attend and have presented feedback to from our own meetings with local representatives. This group will support Ministry of Defence personnel and locally employed staff potentially facing unemployment and identify and develop longer-term activity needed to support the sites' local economies. The Local Enterprise Partnerships, the MP for West Suffolk, local councils, the Ministry of Defence and US representatives attended for the first meeting at the end of January. The meeting was very positive because there is a firm commitment to work together and tackle any impact that the closure may have on jobs and the local economy.

In parallel to this work, we need to gain an understanding of the opportunities that the expansion of RAF Lakenheath may bring. Detailed discussions have taken place to understand the exact nature of this growth and the impact it will have on local communities, which we will feedback to them. We are also carrying out a study to gather data which will identify the impact the bases have on our economy now (which will help to inform future plans).

Encouraging international trade links

We have been working to encourage international trade between West Suffolk and Hong Kong by establishing links between the councils and Hong Kong business leaders. The Hong Kong Trade Development Council (HKTDC) visited Bury St Edmunds in

November 2014 and delegates were impressed with the area's good transport links to London and the productivity of the region, acknowledging that foreign investors should give West Suffolk serious consideration.

Following this initial visit we were very pleased to welcome the HKTDC back with their Think Asia, Think Hong Kong: Finding your business partners event which was held at the Athenaeum in Bury St Edmunds in February 2015 and at which the inward investment packs were launched. We very much look forward to developing our relationship with the HKTDC in the coming years.

4. Promote West Suffolk by developing an investment brand

In partnership with OurBuryStEdmunds and Bury St Edmunds Town Council, St Edmundsbury Borough Council is funding the creation of a Destination Management Plan for Bury St Edmunds. A group of local stakeholders has been set-up and this work will see businesses and organisations working together to determine the long term strategy for tourism. At the end of 2014 an independent assessment was completed of the value of tourism to Bury St Edmunds, where baseline data was gathered and workshops held with local stakeholders. This will be followed by a Destination Management Plan that will include recommendations for how to deliver growth in tourism, which will in turn lead to the creation of a Destination Management Organisation (DMO). This will be a new partnership between local businesses and organisations, setting out an aspiration for how they want to grow the town's tourism in the future.

Once established, the DMO will coordinate tourism activities, bring together resources and expertise and provide long-term strategic direction for tourism and a strong brand identity.

Business Festival

October's Business Festival attracted over 1500 attendees. Entitled 'Going for growth' the festival, which was organised by the West Suffolk councils in conjunction with more than 20 partner organisations, provided events across West Suffolk in Mildenhall, Newmarket, Bury St Edmunds, Haverhill and Brandon and also outside the area in Cambridge and Sudbury. Forest Heath District Council and St Edmundsbury Borough Council jointly sponsored the West Suffolk Award for International Trade and we were very pleased to present the award to Andrew Denny of Denny Bros/Fix-a-Form International.

Improving how we communicate with local businesses

As set out in the Six Point Plan for Jobs and Growth, staff have been visiting businesses throughout West Suffolk to offer support, disseminate suitable information and highlight relevant funding opportunities. In addition, the newly formed West Suffolk Business Forum, that brings together the Bury St Edmunds, Haverhill, Newmarket and Suffolk Chambers of Commerce, Menta, the Federation of Small Businesses and other business support organisations, has offered the opportunity for a wider, more joined-up, approach in support of businesses in West Suffolk.

5. Create a brighter future for market towns and support town centres

Thriving town centres

2014-15 has seen a significant reduction in the number of empty shops in Bury St Edmunds town centre and the town's market is enjoying a revival. In July 2013 Bury St Edmunds had a 10.5% vacancy rate for retail units – outside of the 5-10% deemed

healthy by the Association of Town Centre Management. However less than a year on, the figure has reduced to 6.5%, despite a rise in the national rate to 10.6%.

We are pleased to report a similar picture across West Suffolk. The five main town centres (Brandon, Bury St Edmunds, Haverhill, Mildenhall and Newmarket) have an overall vacancy rate of 5.5%. We are encouraged to note that 60% of the units across West Suffolk's town centres are occupied by independent retailers, compared with a national average of 32%.

During 2014-15 Newmarket Retailers' Association (NRA) in partnership with Forest Heath District, St Edmundsbury Borough and Newmarket Town Council, Newmarket and District Chamber of Commerce (NDCC) and key representatives of the horse racing industry, hoteliers and tourism businesses agreed to embark on a campaign to implement a Newmarket Business Improvement District (BID). Consultation has taken place and a proposal has been put forward to deliver a BID. Work is ongoing and Forest Heath, along with other stakeholders, is part of a task group set up to manage the process for putting forward the BID, which will lead to a vote later in 2015.

OurBuryStEdmunds is the Business Improvement District (BID) in Bury St Edmunds and in November 2014 they were re-elected to continue to support the Bury St Edmunds economy, not only by bringing in more visitors, shoppers and businesses to the town, but also by reducing costs to businesses through joint events and marketing that are subsidised for BID members. We value the work that the BID delivers and work closely with them to deliver events in the town such as the Whitsun Fayre beach and initiatives such as the 'Free from 3' parking scheme.

ONE Haverhill is an independent partnership that brings organisations and resources together and supports residents to make the changes they want to see in their town. Set up initially as a Government pilot the partnership continues to be active and in 2014 ONE Haverhill worked with local businesses to create 51 apprenticeship opportunities for young people. This initiative has also attracted funding from Jobcentre Plus to ensure that opportunities can continue to be created.

The growing town of Clare is a self-sufficient community which draws shoppers and visitors from an immediate population of 8000 including neighbouring villages, as well as tourists all year round. Clare has about 100 local businesses. The bank, GP surgery, library, optician and many professional firms also bring customers into Clare, which local people describe as 'a market town without the market'. There are small commercial areas for businesses needing workshop space.

Newmarket Vision

The Newmarket Vision was established in 2012 and is a partnership of public, private and voluntary sector groups working to improve the town centre, tourism and educational opportunities, traffic and community planning. The Newmarket Vision Steering Group coordinates the work of four groups:

- Community planning delivery group;
- Town centre, retail, local economy and tourism delivery group;
- Traffic and highways delivery group; and
- Education delivery group.

This year the group was successful in securing more than £800,000 of investment from supermarket developers and Suffolk County Council, as it works to help people shape

and improve the town's future. The money has already been put to good use on projects across the town, including, the Bill Tutte memorial and shop front improvements. A further £450,000 has been allocated to schemes to improve pedestrian access and horse movements across the town.

The education delivery group is working with the local schools as part of the county-wide Rising High in Suffolk initiative to raise educational attainment.

Improving the market offer in Newmarket

Since January 2015 we have been working with the Newmarket market traders to develop plans to revitalise the Newmarket market. This was prompted by consultation on the revised Market Licence Regulations for Newmarket market detailing how the market should be operated, which was a recommendation by the National Association of British Markets. These are very similar to the regulations introduced in Bury St Edmunds and Haverhill markets in 2014. The regulations offer traders and the councils a consistent approach to how the market should be operated.

The consultation with the traders has included the introduction of the Newmarket Trader Market Liaison meeting. The purpose of this is to develop and promote the market to attract new shoppers and traders which builds on our commitment to the revitalisation of the market as one of the key aims of the Newmarket Vision programme.

As part of our work to revitalise Newmarket market we held four events in the town. These included an Easter family day, Christmas party day, Guineas Shopping Centre 40th birthday celebration and Love Your Market campaign day. All of these events were well supported by customers and stallholders and promoted Newmarket as a great place to visit, shop and do business.

We are delighted to report that Newmarket has become the first town in the country to meet an Olympic standard in customer care and has achieved WorldHost Recognised Destination Status. Twenty businesses and over 230 staff in Newmarket took part in WorldHost training, which was supported by Forest Heath and the county council.

The status is hoped to bring more tourists and shoppers into Newmarket and encourage them to return after receiving excellent customer service. The WorldHost training programme was first used to train thousands of staff during the London Olympics in 2012.

Newmarket Vision, which is also working on boosting retail and tourism in Newmarket, has also supported the initiative.

Christmas shopping in our towns

Once again this year we supported the Merry Mildenhall Christmas community celebration event. Forest Heath District Council provided a £5,000 grant and worked with Mildenhall Parish Council and many partner organisations and retailers to hold this community event to promote Mildenhall as a shopping destination. Retailers remained open later than usual and provided sherry and mince pies to their visitors. This was the sixth year for the celebration and responsibility has now passed to Mildenhall Parish Council who will be organising it in the future.

Newmarket Winter Wonderland was organised by Newmarket Town Council and supported by Forest Heath District Council with a financial contribution. It was a three-day event held over the weekend of 19 to 21 December at the Memorial Gardens in Newmarket. Showstopper events included ice sculptures and an ice skating rink.

We worked with Greene King to enable extra car parking in Bury St Edmunds in the run-up to Christmas and into the New Year. Greene King made their 400 space staff car park available for public use for the five Saturdays across the festive season.

This initiative, along with the extension of the 'Free from 3' car parking initiative to include Thursdays in the run up to Christmas, park and ride facility in Saxham, and the opening of the council staff car park in Olding Road as a park-and-walk destination, significantly increased the number of available parking spaces. This enabled Christmas shoppers to take advantage of the retail offer in Bury St Edmunds. We also worked with Haverhill Chamber of Commerce on a 'Free from 3' initiative which commenced on 12 December and ran every night until Christmas Eve.

The Bury St Edmunds Christmas Fayre consolidated its position as one of the country's foremost seasonal events with another record year in terms of visitor numbers. It is estimated that over the four day event around 120,000 visitors enjoyed the Fayre. The fayre began on Thursday with a community night, including half price fair rides and a firework display. Over 300 stalls offered products ranging from local crafts and food and drink to gifts from around the world.

Love your market

Over the year we have organised a range of promotional events to encourage people to use their local market and shop locally. During the year we organised a number of special events around the markets:

- Mildenhall Market on Halloween – making Halloween decorations and face painting.
- Bury Market at Easter - an egg hunt, bonnet making and the Easter bunny.
- Haverhill Market - dancing in the street, live entertainment, hula hooping, graffiti wall, street dancing and beat boxing.
- Newmarket – two Love your Local Market events, including the Guineas Shopping Centre 40th birthday celebration.

6. Developing growth projects in key sectors of the economy

Tourism in Newmarket

July saw the launch of a campaign to attract new visitors to Newmarket and encourage them to experience more of the town's attractions. The project was supported by a granting of a £30,000 loan from the council to the Discover Newmarket group (formerly Newmarket Experience).

The Discover Newmarket Group includes businesses and visitor attractions such as The Jockey Club (Newmarket Racecourses, The National Stud and Jockey Club Estates), the Animal Health Trust and the National Horseracing Museum. Following loan funding from Forest Heath District Council, the Group was launched in November 2014 and is developing a strategy for maximising the tourism potential of the town through offering tours to the wide array of horseracing attractions in and around the town. The new website can be found at: www.discovernewmarket.co.uk. We help to promote what Discover Newmarket has to offer through our tourism partners.

The opening of the National Heritage Centre for Horseracing and Sporting Art in 2016 will attract tens of thousands of additional visitors to the area, and is a nationally significant £15 million regeneration of a range of listed buildings right in the heart of

Newmarket. The district council is the freeholder of the entire site and is responsible for the delivery of the new heritage centre, which will become the National Horseracing Museum (currently operating from premises in the High Street). This year we worked with the Museum to enable visitors to use it as a tourist information point, thus creating new links between many visitors to the museum and the plethora of other local events and places to visit.

7. Vibrant streets and recycling in West Suffolk

Dealing firmly with fly-tipping

We take pride in the beauty of our towns and villages and understand that this plays a key part in attracting people to our area. We do all we can to maintain the area's attractiveness and take firm action when necessary.

During August West Suffolk brought three successful prosecutions at the Magistrates' Court against residents and a trader who illegally dumped their waste. Forty paint tins were dumped in Coney Weston after a trader failed to check the credentials of the individual he paid to remove his waste. He was prosecuted and found guilty of failing to comply with his Duty of Care resulting in a total fine of £1162, including £612 towards council clear up costs. We set ourselves high targets for reducing fly-tipping. Our key performance indicators show that fly-tipping incidents up to December 2014 were lower than for the same period in 2013/14 at 310 compared to 370. This is largely due to continued targeted enforcement in hot spot areas.

Over the summer the Suffolk Waste Partnership launched 'Operation Tip Off' which included multi-agency crackdown days to identify and discourage potential fly-tippers, and a communications campaign to encourage members of the public to use reputable companies for waste collection. The campaign was recognised as a best practice approach to working in partnership at the prestigious national Chartered Institution of Waste Management awards held in November 2014.

Litter picking

We have supported a number of voluntary organisations across West Suffolk with litter picking and grounds maintenance work. Throughout this year a range of litter picking events have taken place with over 800 volunteers from local organisations who make an invaluable contribution to keeping the local area clean and attractive.

Make Food Waste History

As part of the Suffolk Waste Partnership, staff have been supporting the 'Make Food Waste History' campaign. WRAP, the Government body for dealing with waste and resources, has calculated that the average family wastes £700 of food every year. In addition to the environmental cost of producing waste for the bin, as a county we are also paying the financial cost for disposal of this waste. Helping householders to reduce food waste will save them money and make the food chain more sustainable. The campaign is based around a YouTube video, available at: <https://www.youtube.com/watch?v=ZVkaYxJDqmI>. This gives householders tips on how to plan meals in advance, store food correctly, measure portion sizes and recycle any food that is wasted. The video currently has had over 73000 hits, of which 97% are from Suffolk. The online presence has been backed up with roadshows in each district to provide advice and tools such as measuring cups and shopping lists as incentives for taking part.

Glass recycling

A tender for the collection of glass from bottle banks was issued in August 2014. The tender is for a contract to continue and improve collections of glass from collection points across Suffolk. New legislation came into force in January 2015 to improve the quality of recyclables collected and this means that it is inadvisable for glass to be collected with other materials as it contaminates other material streams and reduces their quality. This legislation means that having a strong network of glass collection points is as important as ever and the new contract will allow the Suffolk waste collection authorities, including West Suffolk councils, the opportunity to share in the profits made from selling the glass collected.

Recycling more

The new contract between the Suffolk Waste Partnership and Viridor Materials Recycling Facility (MRF) for household recycling started in November 2014. This means that residents can now recycle aerosols, books, metal pots and saucepans and cartons in their blue bins. This is in addition to plastic bottles, tubs and trays, paper, cardboard, cans, foil and textiles that were collected under the previous contract. Information leaflets detailing the changes have been sent to all households across Suffolk featuring Bernie the bin man. There is also an informative website and video which, since November 2014, until the time of preparing this report has had over 6000 views, see: <http://www.suffolkrecycle.info/>

8. Promote energy and water efficiency measures

We continue to support local businesses with grant funding for energy efficiency measures. During 2014/15 we gave £6689 of grant investment to seven businesses. It is estimated that this programme will generate savings to local businesses of over £67,100 during the lifetime of the investment and reduce CO₂ by 275 tonnes annually.

Across St Edmundsbury our water usage has been reduced from 23,280 m³ in 2013 to 16,793 m³ in 2014. This change has been due to an overall reduction in water usage, together with the rain water harvesting system at Haverhill depot now working more efficiently.

Photovoltaic panels – rent a roof

Proposals are currently being developed for the installation of photovoltaic panels on the roofs of council-owned properties in West Suffolk. They are already installed on the College Heath Road site in Mildenhall and West Suffolk House in Bury St Edmunds. As well as installing these energy-generating panels on council offices we are also looking at installing them on council-owned business units. These proposals would see the councils generating an average 10% return on their investment in the panels as well as securing reduced cost energy for the businesses in the units. Detailed proposals are currently being worked up with a view to installation on a number of sites later in 2015.

Priority 2: Resilient families and communities that are healthy and active

We want to see

1. a thriving voluntary sector and active communities who take the initiative to help the most vulnerable;
2. people playing a greater role in determining the future of their communities;
3. improved wellbeing, physical and mental health; and
4. accessible countryside and green spaces.

Why this was a priority for 2014/15

West Suffolk is a prosperous and attractive place in which to live and work and visit. However, there are pockets where some individuals and families are experiencing deprivation and social upheaval, which can include isolation, lack of confidence and family breakdown. Catching problems early and before they escalate can lead to benefits for the people involved, as well as savings to the public purse, whether through cutting demand for services (for example, fewer crisis interventions) or overall improvements in health and wellbeing. Our focus is on prevention and supporting families and communities to build resilience and identify what is important to them.

What we have done to support this priority:

1. Supporting our communities

Community centre transfers

West Suffolk continues to support the transfer of community centres to enable groups to develop and expand their assets to meet their needs. The transfer of Westbury Community Centre in Bury St Edmunds progresses with completion anticipated for spring 2015. A feasibility study for Newbury Community Centre (also in Bury St Edmunds) was commissioned in February 2015 and will consider the various options for the site. Outcomes of the study are awaited and will be shared with the local community as soon as possible. We are negotiating with the River of Life Church regarding the transfer of the Chalkstone community centre in Haverhill. Consultation has taken place with local residents, existing customers, community groups and local councillors, which was organised by River of Life. It is anticipated that the centre will be transferred by summer 2015.

We are delighted that the redevelopment of St John's community centre in Mildenhall has been completed. Forest Heath District Council owned the previous community centre and surrounding land. The area has now been redeveloped and includes a new purpose built community centre including one main room, two smaller rooms with kitchen, office and storage facilities. The community centre is owned and managed by the Keystone Development Trust. The housing element includes 18 affordable rented homes, owned and managed by Orbit East, with another two homes owned by the Keystone Trust and privately rented to support the running costs of the community centre.

We funded the cost of building the community centre which will be a significant new asset for the local community. It is more energy efficient, easier to maintain and the layout is more user-friendly. The centre is due to be officially opened in March 2015.

Neighbourhood planning

Parish and town councils have the opportunity to decide on the future of their area by developing a Neighbourhood Plan. This is a community-led framework for guiding the future development, regeneration and conservation of an area. This year we have been proactive in communicating with parishes about how they can get involved with neighbourhood planning. Guidance has been produced together with two new webpages and application forms for developing a plan. We were also delighted to welcome delegates to West Suffolk House for a masterclass that has been run nationally by the Planning Advisory Service. We have had early discussions with a number of parishes about adopting a plan.

Local community initiatives

Lakenheath

The Royal British Legion site in Lakenheath has been purchased under the Community Right to Bid process. We worked with the group to secure funding and in May 2014 a successful bid ensured that the land and building would remain for the benefit of the community. A sub-committee of the Lakenheath Peace Memorial Hall was formed, known as the People's Project, which was empowered to progress this project for the benefit of Lakenheath's community. The People's Project is in the process of raising funds with public consultation taking place on the development of a new community hub.

Lidgate

With the support of staff, Lidgate parish council has established a community speed watch scheme following concerns raised by local residents. Council staff were able to introduce Lidgate parish councillors to volunteers from a neighbouring scheme who provided the equipment for free. Due to the dedication of the local community the scheme is now operating independently and successfully on a regular basis.

Studland Park, Newmarket

In response to a request from the Newmarket Vision Steering Group we worked with Suffolk County Council to consult residents of Studland Park in Newmarket about their local issues and concerns, through a community lunch. This consultation supported work already started by local ward members and it was very well attended, bringing together residents to discuss their concerns which included speeding, car crime and parking. As a result of this we have worked with a range of agencies and the local ward members to develop an action plan for the estate in partnership with a newly formed Residents Association and Neighbourhood Watch Scheme.

Great Barton

Great Barton parish council held an Open Day in October 2014. The aim of the event was to celebrate the range of activities that take place in the village. We attended this event, supporting the parish council and taking opportunities to meet and talk with partners. We also carried out consultation on whether the idea for a new initiative, the Good Neighbourhood Scheme, was supported by local people. There was very positive feedback and the scheme is now being progressed with Great Barton Free Church.

Stanton

Council staff were made aware that the lack of bus service between Stanton and Bury St Edmunds meant that resident of Shepherds Grove either had a very short or very long stay in the town, which was not suitable for users. As a result we worked with Stanton Residents' Association, local residents, Simonds buses and Suffolk County Council to provide an additional bus service in the afternoon. This addition to the service has been well used and appreciated by residents.

Horringer Court, Bury St Edmunds

Horringer Court Community Church, Horringer Court Middle School, Horringer Court Residents' Association, Suffolk County Council staff and county and borough councillors have formed a group and are working together, to identify or build a community venue. This followed the closure of the care home in the ward which had an arrangement with the local community to allow groups to access their facilities to enable community groups to meet.

Funds are being raised for a new centre for the local community and school to access. The school is exploring the possibility of allocating land on its site. The Community Church has raised around £80,000 to contribute towards the project, the Residents' Association is continuing to consult with the community to establish the needs. Council staff are supporting the group which is moving into the next phase. This involves setting up a Charitable Incorporated Organisation (CIO) and training (funded from a borough councillor's locality budget) to increase the group's skills and progress the project.

BurySOUND

The 16th BurySOUND event took place in October and November. It has become East Anglia's best known battle of the bands competition uncovering and promoting some of the best and upcoming bands. The final was held at The Apex and enjoyed positive national as well as local coverage.

Improving communications

We have also developed new webpages to provide information specifically for parish and town councils to help them carry out their functions and help support their communities: <http://www.westsuffolk.gov.uk/community/parishandtowncouncils.cfm>

The information is split into four themes: your council; your environment and economy; your families and community; and working with us. Topics cover a wide range of issues including council tax precept setting, elections, waste management and play parks. The St Edmundsbury webpages were launched during January in Rural News.

St Edmundsbury Rural News, a quarterly e-newsletter, is another way in which we keep in touch with parish and town councils about what's going on and how we can help, and provide information about the latest issues affecting the parishes. The newsletter has an 'Over to You' section for parish and town councils to share anything with other rural communities, through Rural News. We have refreshed the format in response to feedback received from parishes.

Our parish events continue to take place regularly and remain popular with parish and town councils. St Edmundsbury's parish conference takes place twice a year and give an opportunity to hear from councillors and staff, ask questions, take part in workshops and network with other parish councils. Forest Heath's parish forums take place every two months, with the option of two additional special forums being called

by the parishes every year. At each forum up to two subjects can be discussed with the topics being agreed at the previous meeting. Forum meetings also give the opportunity for networking and to discuss current issues.

We organised a 'community connectors' event in partnership with *Newmarket Community Events* which took place in Newmarket in December 2014. The aim was to celebrate all the positive community work taking place across the town and it brought people together in a relaxed environment to share ideas, best practice and the success of a range of community activities. A more formal event is planned for May 2015 which will bring together community champions and organisations to share ideas, skills and aspirations.

Locality budgets

The Forest Heath Locality Budget Scheme is in its second year of operation and continues to provide a valuable source of funding for local communities. The scheme provides modest seed-funding which councillors can use to help local initiatives get off the ground.

Following the success of the scheme in Forest Heath, St Edmundsbury implemented councillor locality budgets in 2014/15 on a pilot basis. It operates in a similar way to the existing Forest Heath scheme.

Across West Suffolk, over 120 community projects have been supported between April 2014 and December 2014. These range from funding to supply and erect fencing around allotments, to helping with the supply of equipment for a mother and toddler group and refurbishment and funding for war memorials. A full list of projects that have received support can be found at the following link:

<http://www.westsuffolk.gov.uk/localitybudgets/>

Rural Initiatives Grants

In 2014/15, eight projects received funding through the Rural Initiatives Grants scheme in St Edmundsbury. The parish council in Lidgate has provided play equipment in the village, as before children had to travel to neighbouring villages to access facilities. The play equipment at Barrow Village Hall was no longer fit for young children who were playing in unsafe places. With the funding, modern play equipment has been provided to facilitate outdoor play.

2. Meeting current and future sports provision

In Mildenhall, the fitness studio and gym at the Dome Leisure Centre has moved to the Forest Heath council offices at College Heath Road. The arrangement includes a new purpose-built dance studio, along with a larger gym and brand new changing rooms. There is also more parking available at the new site which will help accommodate increasing demand for health and fitness in the town. Although it makes an immediate saving for taxpayers, this move is temporary until a new permanent facility is provided, along with a new swimming pool, as part of the exciting Mildenhall Hub - a partnership project aimed at bringing a range of public services in the town on to one or two sites.

3. Enhancing wellbeing: leisure, parks, heritage and events

Parks and green spaces

We are delighted that East Town Park in Haverhill, the Abbey Gardens in Bury St Edmunds, Nowton Park and West Stow Country Park have all been awarded The Green Flag Award for 2014/15. Every year we are welcoming more visitors to our parks and this award will reassure people that our parks are safe, secure, clean and well looked after by a team of staff and volunteers.

An anonymous donor gave £40,000 to St Edmundsbury Borough Council which paid for improvements to the sensory gardens as well as the refurbishment of the water gardens that were unveiled in summer 2014 in the Abbey Gardens. The project included new planting, improved appearance to the access for visitors and restoration of the pond and pathway.

The Bury St Edmunds Memorial Garden Fund raised funds to construct a memorial garden in the Abbey Gardens which we have supported. This important memorial acknowledges the deaths of 57 local Jewish people in 1190 who were not previously commemorated, together with other victims of genocide. The memorial is located just inside the Abbey Gate. It opened on 27 January 2015, Holocaust Memorial Day.

During 2014-15, St Edmundsbury Borough Council worked in partnership with Haverhill in Bloom, local schools and the Haverhill History Group to revitalise St Mary's Churchyard in Haverhill. The project will see headstones recovered from the undergrowth and cleaned and vegetation cleared to allow new planting in 2015. Lights will also be installed along the path and local school children will provide pictures depicting the history of Haverhill.

In response to concerns raised by residents about grass cutting on highway verges, urban areas and conservation areas in a number of locations across Forest Heath, we have worked to improve the current grass cutting schedule which will come into effect in 2015 and improve the appearance of the local area.

This year we have adopted a West Suffolk Joint Tree Management Policy. The introduction of this policy ensures residents can access information about our inspection and maintenance regimes, ensuring that the tree stock is maintained in a safe and appropriate manner, and provides a clear, standardised approach to the way both councils manage trees and woodlands.

Spaces for play

A new Indoor Sports and Playing Pitch Strategy is being developed for West Suffolk. This is important to ensure that the demand for sports and recreation facilities are planned for to take account of the needs of the current and growing population of West Suffolk. In the future the strategy will also provide evidence to support funding bids, for example Sport England. In the meantime, this year we refurbished, or began work on a number of play areas:

- Greville Starkey, Newmarket started in early 2015;
- Horringer Court, Bury St Edmunds completed in autumn 2014;
- Haverhill Recreation Ground completed in March 2015;
- Quendon Place, Haverhill started in early 2015; and
- St Johns, Mildenhall completed in February 2015.

Case study: Bury Skate Park

St Edmundsbury Borough Council contributed £150,000 towards a £250,000 skate park project in Bury St Edmunds with the skateboarding community raising the remainder of the funds and choosing the designs themselves. The Bury Skate Park Experience is a charity set up specifically to coordinate the project which has provided a well-used and important facility for the community.

Heritage

We have seen a number of exciting projects come to fruition across West Suffolk this year. Orchestras Live is a partnership between the district council and others that delivers high quality concerts across Forest Heath. This year the partnership brought the Lullaby concerts to nurseries in Brandon, Mildenhall and Exning and 278 people attended the concert in Newmarket. St Edmundsbury is part of a similar partnership that has delivered concerts in Bury St Edmunds in this year.

Forest Heath and Fenland are contributing towards a Creative People and Places Project called 'Market Place', a community project aimed at boosting people's involvement with the arts which has been funded by the Arts Council for England. The project will support existing arts groups in the area whilst offering new experiences and opportunities. It is hoped that the project will enable local communities to engage with the arts on a regular basis. The views of local communities are at the centre of this approach in shaping how the project will develop.

Forest Heath is now a member of the Suffolk Museums Partnership which means we will receive support with securing external funding and training opportunities. We are considering a number of possible projects.

One of the replica Anglo-Saxon buildings at West Stow, which was built nearly 40 years ago, was replaced during 2014/15. The timber framework for the building was prepared locally and the thatched roof has been added, all using traditional methods. West Stow Village continues to be recognised as a site of international archaeological importance and we are very proud to be investing in the site for the benefit of future families and schools that visit.

The borough council supported the successful bid for £20,000 from The Magna Carta Trust's National 800th Anniversary Commemoration Committee to add to existing Heritage Lottery funding and match funding of £15,000 from the borough council itself. The money went towards a hugely successful light and sound trail through Bury St Edmunds in October. Nine thousand people also viewed a copy of the Magna Carta in the Cathedral. We were very proud to be able to celebrate this anniversary and Bury's inextricable links to the Magna Carta.

Sporting events

We were delighted to host a number of nationally important events in this year. As part of its journey to the Commonwealth Games the Queen's Baton Relay stopped at the Rowley Mile Racecourse, where around 500 children from 22 schools took part in a mass participation schools relay together with a festival giving participants and spectators the chance to find out about a range of local sports opportunities. The baton also came to the leisure centre in Bury St Edmunds where an athletics competition involving over 400 school children took place, including a competition for young disabled people from five special schools.

Bury St Edmunds was chosen to host the final leg of the Women's Cycling Tour, the first ever international stage race for women. It brought hundreds of international female cyclists and visitors to the town, with many others lining the route. The success of the event means that the town will not only host the race again in 2015 but this time it will be the opening stage of the whole event.

4. Improving health and wellbeing

The Suffolk Health and Wellbeing Board was established to encourage integrated working between health, care, police and other public services in order to improve wellbeing outcomes. West Suffolk is represented on the board which includes the county council, local clinical commissioning groups, NHS England, HealthWatch, the police and the voluntary sector as well as district and borough councils.

In 2014/15, the board continued to work towards delivering its priorities which are: (i) every child in Suffolk has the best start in life; (ii) healthy environment; (iii) older people in Suffolk have a good quality of life; and (iv) improving mental health and wellbeing. The recently published Suffolk Public Health report confirms that 20% of children are obese by age four, and 30% by age 10 and 11 and that this obesity adds to long-term complications such as type two diabetes. This is an issue which West Suffolk councils can make a real difference in terms of the leisure and sport opportunities we can provide which underpins our preventative approach: supporting a healthy and active lifestyle helps to prevent longer term health problems.

In November 2014, the West Suffolk Health and Wellbeing Forum was established, building on the success of the previous Forest Heath forum. The Forum, which brings together GPs, leisure managers, councillors and the voluntary sector, considers key issues affecting health and wellbeing across West Suffolk. For example, at November's meeting, the role of a new Community Health Coach in Forest Heath was discussed. Funding for the coach was recently secured so that Live Well Suffolk services can be provided in Forest Heath. The pilot scheme offers services to Forest Heath residents that will help them make healthier lifestyle choices, including offering group programmes and one-to-one support, helping organise physical activity courses, weight management programmes and smoking cessation advice. Many of these services are also offered in St Edmundsbury.

The West Suffolk Clinical Commissioning Group (WSCCG) is now located in West Suffolk House and this has helped to encourage partnership working. The WSCCG has produced a health services directory for each of Brandon, Mildenhall and Newmarket, which has been developed following a successful pilot in Haverhill. Paper copies are available across the towns including in GP surgeries, children's centres, pharmacies and the directory is available online at: <http://www.westsuffolkccg.nhs.uk/your-health/health-service-guides/> Both Forest Heath and St Edmundsbury provided financial and other support for the publication of these directories.

Primary school children at Glade Primary School in Brandon and Laureate Primary School in Newmarket took part in 'Healthy Heath'. Through preparing and eating different meals the children learnt about health and safety, food preparation, the ingredients that go into food and the benefits of exercise. Courses were delivered in summer 2014 after receiving locality budget funding in 2013/14. The courses took place in the schools and focused on learning how to make healthy home cooked meals.

Anglia Community Leisure and Abbeycroft Leisure have contributed towards a number of programmes in this year to support the promotion of health and wellbeing, including:

- the Exercise on Referral Scheme across Forest Heath which has generated 1861 attendances with 237 client assessments taking place;
- weekly NHS falls prevention sessions in Brandon with over 300 attendances by the end of November 2014;
- the Explore Outdoor Initiative which promotes physical activity, citizenship and leadership skills, across Forest Heath there have been over 600 attendances; and
- the Aquagym programme which operates across Mildenhall and Newmarket and which remains popular, generating over 3000 visits this year.

The work detailed in this section contributes to our equality objective to improve physical and mental health and wellbeing.

5. A commercial approach to our leisure and culture offer

West Suffolk has recognised that with government cuts to funding we must take a more commercial approach to the way we do business and in particular our leisure and cultural offer. We balance this commercial approach with our focus on enhancing physical and mental health and wellbeing and taking a preventative approach, while also acknowledging the positive impact our cultural facilities have on our local economy.

In this year we have re-launched the West Suffolk Diary which is now called *What's on West Suffolk* with information and events listed for the area at: www.whatsonwestsuffolk.co.uk.

West Stow country park

St Edmundsbury Borough Council has this year agreed to investigate a range of proposals for the appropriate commercialisation of West Stow country park. This will complement the existing attractions that include the Anglo-Saxon village and museum, heritage storage facility, children's play area, coffee shop and visitor centre and the nature trails.

The Apex

Box office sales at The Apex and marketing activity have increased. A new supplement promoting the venue was produced in November 2014, which was distributed across West Suffolk through the East Anglian Daily Times and Mercury newspapers. Most of the cost of producing this supplement was offset by the advertising that appeared in the publication. Following the supplement's distribution there was an immediate uplift in sales. A comparison of the number of tickets purchased with the same week the previous year showed a doubling in numbers, and particularly pleasing were the number of new customers who were identified.

The Apex Gallery space continues to add diversity in its offering and a recent print workshop exhibition from Gainsborough House has increased footfall and received positive feedback.

As the reputation of the venue grows, new and more renowned acts are being attracted to The Apex. We have also seen a rise in demand from community groups

using The Apex. The chess club is increasing its attendance and now regularly attracts over 20 players on a Tuesday afternoon. The bridge club is full and dancing classes continue to be well attended. The Apex has also been used by a wide range of schools throughout the year, including hosting an art exhibition by the Bury Schools Partnership. Successful community events also continue to take place such as the Green Fair and Christmas Craft Fair. The Bury St Edmunds Friendship Group for people aged 50 plus now holds their event once a month at The Apex. The group offers social support, lunch clubs, weekly fun activities, high street discounts, holidays, day tours and lots more!

The New Year saw The Apex partnering with the Bury Free Press to produce a further supplement which helped maintain the increase in ticket sales. Sodexo Prestige, the hospitality partner for St Edmundsbury borough council continues to improve its performance.

We are pleased to report that between April and December, ticket sales at The Apex increased by 50% which also means an increase in trade to the town's night time economy.

Priority 3: Homes for our communities

We want to see

1. sufficient housing for current and future generations, including:
 - more affordable homes;
 - improvements to existing housing;
2. new developments that are fit for the future, properly supported by infrastructure, and that build communities, not just housing; and
3. homes that are flexible for people's changing needs.

Why this was a priority for 2014/15

Whilst many people in West Suffolk benefit from good housing, housing needs are constantly changing with a growing and ageing population. On the one hand, there is a need for more affordable housing for young people wishing to gain independence and to make a start on their work or family life; whereas on the other hand, there is a demand for more suitable accommodation for those with higher support needs, such as vulnerable or frail elderly residents. We need to ensure that infrastructure is in place to support our communities and this is a key part of our role as planning authorities. Working to build a strong and growing local economy forms the basis for being able to meet our housing needs and enhances prosperity and quality of life.

What we have done to support this priority:**1. West Suffolk Housing Strategy 2015/18**

The first West Suffolk Housing Strategy was adopted by both councils in October 2014. The strategy explains how we will, working with partners, increase the supply of new homes, make the best use of existing housing and provide specialist housing and support. The strategy involved considerable joint working between Forest Heath and St Edmundsbury councillors, in formulating the actions required to address the housing needs identified through a review of the evidence base. The Housing Strategy builds on the actions in the West Suffolk Strategic Plan 2014/16. Our progress in achieving these actions, plus our other work to improve the housing situation in West Suffolk in 2014/15, is set out in the remainder of this chapter.

All councils are also required by law to carry out a review of homelessness in their area and to produce a strategy. In summer 2014, a review of the extent of homelessness across West Suffolk was undertaken and its results used to inform the West Suffolk Homelessness Strategy adopted in February 2015. The Homelessness Strategy effectively forms an action plan that sets out in more detail how the Housing Strategy actions will reduce homelessness in West Suffolk.

2. Using our planning role to support the delivery of new homes and infrastructure***Developing West Suffolk's planning policies***

In October 2014, Forest Heath District Council agreed to prepare the Single Issue Review for Policy CS7: Overall Housing provision and distribution and Site Specific

Allocation Local Plans in tandem. The Plans will identify where growth and housing will be allocated, together with the necessary infrastructure. The Local Plans are programmed for adoption in July 2017.

In St Edmundsbury, the adoption of the three Vision 2031 Local Plan documents in September 2014 represents a significant milestone in managing the delivery of housing and economic growth across the borough. The documents, for Bury St Edmunds, Haverhill and the rural areas, provide certainty for where and when development will take place and the infrastructure required to support the growth.

We have continued to develop joint planning policies across both council areas. The West Suffolk Shop Front and Advertisement Design Guide has been prepared as a Supplementary Planning Document to support the policies of the Local Plan with guidance, for example, on how these policies can be met when considering proposals for new or improved shop fronts in the town centres. The guidance covers matters such as general design principles; materials and colour; signage and lighting; blinds and canopies; and security measures for retail and other commercial properties.

The Joint Development Management Policies, adopted in February 2015, contain policies that will form an important tool for the day to day determination of planning applications in both St Edmundsbury Borough Council and Forest Heath District Council. The West Suffolk Local Development Scheme programme chart for Local Plan preparation, consultation and adoption was updated in January 2015 and is available on the councils' website at: http://westsuffolk.gov.uk/planning/Planning_Policies/upload/LDS-January-2015-Update.pdf In due course, we will also be working towards a single joint Local Plan for West Suffolk.

Major projects team

The Planning Growth and Regeneration Team dealt with a number of strategic projects across West Suffolk in 2014/15, primarily involving the delivery of housing and jobs. In St Edmundsbury, the masterplan approach to the development of larger, more complicated sites, is providing a further opportunity for communities to engage with the process and to understand how the sites will be developed. Masterplans have been prepared by developers for sites in Bury St Edmunds to the north-east of the town, at Moreton Hall and at Station Hill. This approach will also be adopted for larger sites that will be identified through the preparation of the Forest Heath Local Plan in due course.

Infrastructure delivery

The councils have continued to ensure the necessary and required infrastructure is secured and delivered as part of all new developments. Over the course of 2014/15, contributions for infrastructure including: public realm works (benches/footpath enhancements etc) and transport improvements (cycle ways, crossing improvements and electronic signage) were secured.

The councils have also commenced preparation of the Community Infrastructure Levy (CIL) scheme for West Suffolk. Stage 1 of the Viability Assessment has been completed. The next stage of the process will commence in February 2015.

Improving the development control service

Following the bringing together of our two councils' development control teams, the implementation of a new IT system, a staff restructure in response to our cost saving agenda, and an increase in planning applications, we experienced some delivery

challenges. Over 2014-15, we have identified the problem areas, and assessed what needed to be done to cut delays. In response, we have reconfigured the IT system to allow more self-service online facilities and we have created two areas so that individual planners can develop greater expertise within particular localities. As a result we have seen our performance in determining applications improve to above the national average.

Increasing the supply of housing

Case study: Suffolk Housing Needs Survey 2014

Over 80,000 households were invited in April 2014 to take part in Suffolk's biggest housing survey, to help determine the way we meet the county's housing needs for years to come. When combined with census data and the Strategic Housing Market Assessment, the local results which will be available in summer 2015 will help to influence West Suffolk's decision-making about the future of housing in the area.

Across West Suffolk there is now a supply of housing sites with planning permission which are ready to be developed that ensures that we comply with the government requirement of having enough sites to meet the demand for the next five years.

Forest Heath District Council granted planning permission during 2014/15 for a number of new housing developments in settlements such as Lakenheath, Kentford and Red Lodge. It is anticipated that these will be developed in the short term. In Bury St Edmunds and Haverhill strategic sites are now coming forward where development is likely to commence in the next few years. In the larger villages, a number of allocations made in the Vision 2031 document are also going through the detailed planning stage, ensuring a supply of new homes also continues in our rural areas.

A number of housing schemes have been completed in this year. Three new rented homes were developed in partnership with Flagship and the parish council in Icklingham, while 12 new rented homes in Mildenhall and 13 in Haverhill have been completed by Havebury. Five new homes have also been built including a bespoke bungalow designed to accommodate a family with multiple disabilities, for the Suffolk Housing Society in partnership with the parish council in Whepstead. In Haverhill, Orbit has delivered six rented and five shared ownership homes, including two bespoke bungalows for families with disabilities.

3. Identifying and delivering new funding models for affordable housing

Future options for funding new housing delivery

Over the course of 2014/15, the councils have been exploring a range of options to support the delivery of housing in West Suffolk in order to meet specifically identified types of need. A number of the options will require significant capital investment or borrowing by the councils and we will provide updates on this in the future.

Temporary accommodation

St Edmundsbury has previously been reliant on placing homeless households in bed and breakfast accommodation until they can be found permanent housing. In 2013/14, for example, the council spent £208,000 on bed and breakfast accommodation. However, during 2014, a house in multiple occupation (HMO) in Bury St Edmunds was purchased by St Edmundsbury to use as temporary accommodation. This newly renovated house will provide five rooms for single homeless people who would otherwise be accommodated in bed and breakfast, potentially saving more than

£46,000 a year. After repair costs are taken into account, the investment will effectively be paid back in a little over four years.

In addition the councils are exploring other options to eliminate completely the use of bed and breakfast, so as to both significantly reduce costs to the councils and to provide good quality accommodation for those in urgent housing need. The councils are working in partnership with Havebury Housing on the use of five units of accommodation to house homeless households.

We are pleased to report our key performance indicators show that across West Suffolk we are beating the target we set ourselves for the maximum number of weeks a person or family should spend in temporary accommodation at an average of 11 weeks.

Case Study: Affordable homes in Barton Mills

In September 2014 a new affordable homes development opened in Barton Mills. The Hastoe Housing scheme in Church Lane is a project involving Forest Heath and Community Action Suffolk. We worked with the parish council to carry out a housing needs survey which found that some residents in Barton Mills were living in inadequate accommodation, while others were simply having to move away due to a lack of affordable housing in the village. The scheme has resulted in six new affordable homes all of which have been allocated to local people.

4. Bringing empty properties back into use

In line with our Empty Homes Strategy, which proactively targets long term empty homes (unoccupied for more than six months), we supported 112 home owners to bring their properties back into use during 2014/15. West Suffolk staff have also directly investigated a number of empty properties to prioritise for further action and to provide advice and information in order to support empty home owners to make informed decisions on the right option so their homes could be used for those in housing need. Schemes run by partners designed to assist home owners make better use of their properties have been promoted, such as the Havebury 'Purchase and Repair' and the Orwell Housing 'Lease and Repair' schemes.

Take-up of financial support, available for repairing and letting empty homes, was lower than expected, so this element will be reviewed as part of a wider review of West Suffolk's approach to housing assistance.

A project commenced in autumn 2014 to bring a further ten empty properties back into use by March 2016, which will involve prioritising properties for further action and potentially using legal provisions to ensure we maximise the use of existing stock to meet housing demand. This is in addition to the ongoing work to reduce the overall number of empty homes mentioned above.

5. Ensuring housing is recognised as a core part of other partners' agendas

Supported housing

We worked in partnership with a range of organisations during 2014/15 to prevent homelessness and to ensure people have the right support once they are housed. In particular, we led the work of the Suffolk Co-ordination Service which provides a key point of access for individuals in need of short-term accommodation-based support. In October 2014, we held an Agency Day, bringing together landlords and registered

providers to raise awareness, encourage partnership working and discuss solutions to some of the difficulties experienced by individuals in accessing specialist housing.

Safeguarding vulnerable people

West Suffolk councils also worked in partnership with Suffolk County Council's Children and Young People's Services on the Making Every Intervention Count initiative which is reshaping children's services so as to provide the best possible outcome for children and families. Our work with the Multi-Agency Safeguarding Hub (MASH) has seen better communication between agencies and resulted in an improved service for children, adults and families.

Housing and health

The councils endorsed the principles of the Housing and Health Charter for Suffolk which demonstrates the importance of housing to good health and wellbeing and sets out the commitments of the Suffolk Health and Wellbeing Board to improving health outcomes through better quality housing.

Housing for elderly and disabled people

During 2014/15, we worked with health, social care partners and other local authorities in Suffolk to look at options for meeting the needs of disabled residents, including the provision of Disabled Facilities Grants (DFGs). Part of this work has resulted in the development of a new integrated service through a Home Improvement Agency provider, working together to change the way the service is delivered in West Suffolk. The new contract aims to ensure the Agency provides a suite of housing options and adaptations advice for maintaining independent living for our elderly and disabled residents. Seventy-two DFGs have been provided this year. This work supported our fourth equality objective of providing 'homes that are flexible to meet people's changing needs'.

6. Supporting private sector and registered providers to build new homes and improve existing ones

Support to provide new homes

In summer 2014, Havebury Housing, following partnership working with the councils, received £8 million from the Homes and Communities Agency. Part of the funding will be used to provide 31 new affordable homes by 2018 in Forest Heath, and 234 in St Edmundsbury. Sites will include Mitchell Avenue Garage site in Bury St Edmunds and the former Snooker Hall site in Chalkstone Way in Haverhill.

Improving the quality of existing housing

Over the course of 2014/15, the housing team provided bespoke safety advice, often during inspections of properties, to letting agents, and private sector landlords. Through this work, 52 homes were brought up to standard. Where appropriate, enforcement action was taken to remove or reduce hazards and make homes safe.

A single set of West Suffolk safety and quality standards and guidance was published for Houses in Multiple Occupation (HMOs) in December 2014. The Housing Team inspected 63 HMOs, with 28 HMOs brought up to standard.

In addition to our work and interventions in the private rented sector, 21 homes were brought up to the Decent Home Standard, for vulnerable owner-occupiers, through our grants programme.

7. Provide advice and support to vulnerable households to alleviate fuel poverty

Our community-focused environmental work has included working in partnership with all Suffolk local authorities where we successfully applied for £5.5 million from the Department of Energy and Climate Change to run Suffolk Energy Action (a home energy insulation and boiler replacement programme) for Suffolk residents during 2014/15. The funding is targeted at properties requiring solid wall insulation and a grant of up to £6000 per property is available. A proportion of this fund is available to private sector landlords, and in West Suffolk we are working with landlords with properties in rural areas and off the gas network. We have worked with social housing providers to offer neighbouring owner occupiers' properties external wall insulation alongside a major social housing insulation programme.

We have also been successful in applying for funding to the National Grid Energy Innovation Fund. We have been awarded £100,000 to run an insulation and heating improvement scheme at a park home site in West Suffolk. The scheme will be running through the spring and summer of 2015.

Case study: Warm Homes, Healthy People

Working as part of a partnership with other councils in Suffolk, Forest Heath and St Edmundsbury were awarded a Community Action Award in September 2014 by the national fuel poverty charity NEA with British Gas and the Department for Energy and Climate Change. The award was for the "Warm Homes, Healthy People" project which tackles fuel poverty across Suffolk. The project aims to support vulnerable residents to remain warm and healthy in their homes. This is achieved by providing energy efficiency advice over the phone and in the home and help clients with access to funding and grants to pay for heating bills and improve thermal comfort.

8. Other actions to improve West Suffolk's housing situation

Improving allocation of social and private rented sector housing

As part of the West Suffolk-wide customer access project, the Customer Support Team began dealing with the most frequent housing requests and queries in early 2014. This allowed the Housing Options team to focus on homeless prevention and more complex cases. These changes have resulted in an increase in the number of calls answered from 50% before the changes to 90% as at December 2014. The number of homelessness prevention cases dealt with in the period July to September 2013 was 66 which increased to 102 for the same period in 2014.

Discharge into private rented sector

During 2014/15, the West Suffolk Lettings Partnership (WSLP), which brings together landlords and agents with tenants who need accommodation assisted 59 households (up to the end of quarter three) into privately rented accommodation across West Suffolk. The Letting Partnership also carried out a complete review of the service it offers to the public and as a result has embarked upon partnership working with housing providers to try and accommodate those who are very hard to house. This is co-ordinated through the Housing Forums, made up of housing providers and support agencies who work together to support residents to sustain their tenancies. In December 2014, by working with private landlords, WSLP was able to identify six properties with long term leases and 100% nomination rights that are now available to accommodate people who are hard to house.

Tackling social housing fraud

In July 2014, both councils adopted a new Anti-Fraud and Anti-Corruption policy, which confirmed West Suffolk's zero tolerance approach to social housing fraud. Social housing fraud arises when individuals lie about their circumstances to obtain a social housing property or housing benefit, or when they sub-let a social housing property. The new policy will be supported by a publicity campaign raising awareness of social housing fraud.

West Suffolk ways of working

Forest Heath District Council and St Edmundsbury Borough Council are separate councils, with two sets of councillors and two separate budgets to manage. Together as West Suffolk our councillors are working to face the considerable financial challenges which are a result of uncertainty in the wider economy and constraints on public sector spending. We have a joint Medium Term Financial Strategy which sets out the current and future financial pressures and challenges facing West Suffolk.

Over the past year we have continued to make budget savings through sound financial management, generated income by behaving more commercially and worked in partnership for the benefit of our residents, visitors and businesses. By working together we have saved local tax payers millions of pounds and in 2014/15 councillors froze council tax in Forest Heath for the sixth consecutive year and in St Edmundsbury for the fifth time in six years

1. Embedding more commercial behaviours in our organisation

'Behaving more commercially' is an essential theme running throughout everything we do. The commercial theme is not limited to generating income through trading and charging; instead it is creating a new way of working which affects the values, governance and processes of all council business.

A task and finish group of councillors and staff was established in 2014 to review our systems and processes and to ensure they supported us to behave more commercially. The group researched the role and potential scope of commercial activity in local government with the aim of giving some focus and direction to West Suffolk's emerging commercial agenda.

The group recognised a need for commercial skills within the organisations. The councils employed a Commercial Manager in 2014 to work on specific income generating projects and to assist the change to a more commercial way of working. Workshops have also been held with staff and councillors to discuss commercial behaviours and the new opportunities in West Suffolk. We have also restructured the Operations Service to create more capacity to increase our ability to raise income through commercial work.

Case study: behaving more commercially

During 2014/15 the MOT equipment at the council depot in Bury St Edmunds was upgraded and we are now able to MOT all of our own non-HGV fleet to deliver a cost saving of £3000 a year to the councils. As part of the upgrade, the councils also considered potential customers and we are now providing an MOT service to Suffolk and Norfolk Police and Havebury Housing Partnership. This new commercial opportunity has increased the number of MOT tests by 50% and is generating an income for the council. This example shows that generating income isn't necessarily about looking for new opportunities, it's also about reviewing existing services and considering if we're doing everything we can to engage with all potential customers.

Industrial premises

Forest Heath and St Edmundsbury own a range of industrial premises across West Suffolk. A review of the industrial units identified areas of high and low demand and

Forest Heath Council was able to raise £207,000 from the sale of six units in Brandon which will be used to invest in economic growth in the area. Forest Heath also owns 22 industrial units in Newmarket which are fully occupied and the council is looking to invest in more premises in this area in order to cater for high local demand and create new jobs which will benefit the local economy.

Ideas month

The councils recognise the vast amount of knowledge, expertise and ideas that are held by councillors and staff. During June 2014 this was recognised with a new Ideas Month initiative which offered all staff and councillors an opportunity to put forward their ideas to improve West Suffolk's performance. The initiative progressed the new 'behaving more commercially' way of working and asked for ideas around saving money, commercial opportunities, improving processes or for any suggestions regarding the way we manage our buildings, services and staff.

A full list of 205 ideas was received as part of the initiative and the full list was considered by the councils' Leadership Team. The ideas varied from small money-saving suggestions and more efficient ways of working to restructures and cross-county partnerships. The heads of service responsible for the work areas are continuing to consider the ideas and detailing how, whatever possible, the ideas will be implemented during 2015.

2. Ensuring councillors and staff learn new skills and ways of working

Over the last year we have focused upon delivering new ways of working to ensure staff and councillors have the skills necessary to manage the changes to local government and delivery of council services.

Staff performance

A new performance review scheme for all staff was introduced this year and has brought together clear expectations of task and behavioural objectives linked to the West Suffolk core values of Bold, Energetic, Responsible and Together. The performance review shows synergies between the core values and the councils' strategic priorities and identifies training needs to ensure staff have the appropriate skills.

The Leadership Team (Chief executive, directors and heads of service), service managers and business partners across the councils were involved in a 'Go Make a Difference' accelerated change programme. The programme looks at outcomes to increase collaborative working, better strategic thinking and structured planning, increased confidence and has a keen focus on outcomes. Participants were tasked with a 90 day challenge to embed the techniques and disciplines learnt from the programme to delivery of a project in their service area.

Case study: increasing visitors to West Stow and Moyses Hall

The Heritage Operations Manager for West Stow Anglo-Saxon Village and Moyses Hall museum in Bury St Edmunds set himself a 90-day challenge to improve the heritage sites' education offer with the aim of increasing the number of school visits. The team of heritage officers worked with the Operations Manager to assess the links between the national curriculum and the opportunities available at West Stow. The result of research and engagement with school teachers was a new wider 'stone age' offer

which is linked to the school curriculum. The new offer resulted in an 84% increase in the number of school bookings in November 2014 when compared to November 2013.

Staff learning and development

Completing information security and health and safety training is a mandatory requirement for all staff employed by the councils. During 2014/15 new interactive training modules for information security and several areas of health and safety were delivered online for staff to complete.

During 2014/15 a range of Lunch and Learn drop-in sessions have been arranged for staff to attend. For example, as part of our commitment to health and wellbeing we arranged a session with the NHS West Suffolk Clinical Commissioning Group. Lunch and Learn is a casual training session initiative which is held during the lunch break period. Staff are invited to take along their lunch and listen to guest speakers deliver workshops on various topics such as managing stress, behaving more commercially and other cross cutting initiatives which are being implemented across the councils. One session was held simultaneously at West Suffolk House and College Heath Road to demonstrate the usefulness and potential cost-saving of video-conferencing instead of travelling between the offices.

Where appropriate, we support staff to gain professional qualifications from apprentices to post-graduate courses.

Councillor learning and development

Knowledge and skill development is not restricted to staff, it's also a priority to ensure councillors have the appropriate skills and knowledge to be effective in their role as decision-makers and representatives of their wards. Our shared approach to member development was recognised nationally during 2014/15 as Forest Heath and St Edmundsbury became the first shared services partnership to receive joint accreditation of the Charter for Elected Member Development. The team of assessors praised West Suffolk for its comprehensive member development programme, our next generation leadership development, as well as our culture change journey.

The councils were also recognised in three award categories by the Association for Public Service Excellence (APSE) during 2014/15 when we were shortlisted for the Best Efficiency Initiative category for our implementation of efficiency changes across West Suffolk. An example of an efficiency initiative delivered during 2014/15 is the introduction of MiHR which is a new automated HR and payroll self-service system. The new system delivers a streamlined and efficient service for staff and councillors to manage their pay, annual leave and employment information. The self-serve arrangement has delivered financial and time savings to the councils through reduced printing and form-filling.

3. Continuing to build capacity in the staff structure***Leadership Team and service managers***

The Leadership Team is now a smaller and more strategically-focused team, consisting of the first two levels of management in West Suffolk. We have also created a more distinct third tier of managers at service manager level who deputise for their heads of service and are responsible for the day-to-day operations of their service areas. This structure will enable the councils to create more capacity at the leadership level and empower service managers to lead on service delivery, with a clear understanding of their responsibility to deliver the West Suffolk councils' vision and priorities. The

service manager level will also encourage greater cross-boundary working, enabling a consistent approach to programme management and service delivery across West Suffolk.

New ways of working

The changes brought about through the shared services agenda and Business Process Engineering reviews have seen an increase in effective ways of working amongst staff and councillors. Maximising the best use of staff time when working across various locations has been a challenge. There has been a need for different working arrangements including dual office base contracts, flexible working, home working and home enabling, combinations of office/home working and development of the use of "bring your own device" - in order to enable staff to deliver services efficiently. Other initiatives include video conferencing which is being used to enable meetings to be held at various locations by using technology rather than travel. This is underpinned by our business mileage reduction plan, setting a target of reducing mileage by 10% a year.

We have worked with Councillors to bring them together to discuss matters of shared interest. We now have a regular calendar for joint meetings; enabling shared discussion and understanding as well as building a more efficient use of information and time.

Reduction in sickness absence

Dealing robustly with sickness absence is always a high priority for any organisation. We continue to work together to minimise absence levels and support our staff back into work following periods of long-term absence. Our sickness levels continue to be lower than national public sector averages at 6.95 days per member of staff per year (as at quarter three in 2014-15). We support employees who have had periods of long-term absence due to health issues and offer a wide range of interventions to enable staff to return to work as soon as they are able to. This includes phased returns on amended duties, hours and working arrangements, occupational health support and advice and other welfare support that may be appropriate. Early interventions prove to be successful in helping people back into work in a timely manner and maintaining attendance levels.

4. Strengthening existing relationships and forging new relationships

West Suffolk councils

The partnership between the West Suffolk councils is the backbone to the development of new and existing relationships. We continue to strengthen our partnership of two councils by developing common strategies, shared policies and sharing learning from one another in designing new approaches to public service delivery. During 2014/15 we adopted 17 West Suffolk strategies and policies, replacing those of the individual councils, which are being used to shape delivery of our services. Examples include information security and data protection policies, tree management policy, equality scheme, housing strategy, homelessness strategy and a procurement strategy.

Our new approach to procurement reflects our behaving more commercially approach by reducing red tape associated with making a procurement decision, delivering value for money through use of the latest technology and increasing transparency to ensure accountability for the procurement decisions that we make.

Following the adoption of the procurement strategy there was a need to review the financial procedure rules, contract procedure rules and principles of cost sharing between the two councils. Aligning the three areas was desirable to recognise the

shared nature of much of West Suffolk's service delivery. The review of the financial documents delivered a new transparency and provided the councils with an opportunity to update historic rules and adopt a financial framework which removed labour intensive processes.

The work to strengthen the partnership between the councils continues and there are more projects going on to deliver shared strategies, policies and decision-making processes. At the foundation of every council is its constitution the document that supports the decision-making process throughout all areas of the council. Our councillors are currently working together to develop a shared constitution for West Suffolk. We're giving careful consideration to the development of the new document which will allow us to maintain our own local identity where appropriate whilst simplifying how we conduct meetings, make decisions and hold decision-makers to account.

In late 2013 and early 2014 the West Suffolk councils underwent an LGA Corporate Peer Challenge which is an external health check to review the way the councils operate. The team published its report in April 2014 which praised the amalgamation of staff across the two councils to save public money. It stated that: *"You have much to be proud of in West Suffolk. You have made significant progress at pace on a challenging journey to put in place your shared service management arrangements. You have done this through a strong, shared political vision and direction, and clear, visible managerial leadership. These will stand you in good stead as you seek to achieve your ambitions for economic growth, and build capacity through commercial approaches and partnerships."* The report also recognised the councils' clear sense of ambition, and recognition that we must change the way that we do things in order to deliver the things which matter most to the local residents and businesses in the context of significantly reduced financial resources.

Strengthening existing relationships

During 2014/15, Anglia Revenues Partnership expanded to include all three new full partners: Fenland, Suffolk Coastal and Waveney, thus making us the third largest local authority revenues and benefits service in the country. As part of this growth a review of the senior management has been completed to ensure a clear line of strategic managers to manage relationships with all seven councils and deliver quality revenues and benefits support to our communities, also expecting to deliver year on year savings of £512,000 across the seven partners. The partners and management structure was implemented in 2014/15.

In November 2014 public services in Suffolk, including Forest Heath and St Edmundsbury, were successful in bidding for £3.35 million of new funding and £1.8 million to help us use capital more flexibly from a central government fund called the Transformation Challenge Award. The Suffolk local authorities will use the funding to deliver a major change in our relationships with other public sector bodies such as police and health, voluntary groups and Jobcentre Plus to deliver immediate and lasting benefit to people across the county.

Listening to our residents

We completed a budget consultation with residents, businesses, parish and town councils during 2014/15. The purpose of the consultation was to gauge public opinion on the main savings/income generating options. We also wanted to test views on a range of issues relating to our strategic priorities and themes in the Medium Term Financial Strategy, such as channel shift (encouraging people to use more services

online), our focus on families and communities and our commercial approach. The consultation exercise included focus groups with the public, local businesses, parish and town councils. St Edmundsbury also sent a budget survey to 3000 randomly-selected households across the borough. The results of the consultation informed the budget-setting process and helped councillors to make decisions about the 2015/16 budget.

Forging new relationships

The Transformation Challenge Award funding is a continuation of the work between public sector services in West Suffolk. One of the ways in which we have built relationships with partners is by committing to the principle that sharing our buildings with other services will deliver maximum benefits for service users and taxpayers.

In April 2014 the Mildenhall Jobcentre Plus completed its relocation to Forest Heath's College Heath Road offices in Mildenhall to create the first partnership of its kind in East Anglia. This move means that council staff and the Jobcentre Plus staff can work more closely together to make sure we can supply people with the right skills for local firms.

In November 2014 the Citizens Advice Bureau (CAB) became the latest welcome addition to the Mildenhall offices. We share overheads whilst providing significant customer convenience by providing access to council services, the Jobcentre Plus and now the CAB in one building.

Moving partners from the public, private and charity sectors into our buildings results in some savings. More importantly, it's about finding innovative ways to serve those that we represent. Now Forest Heath District Council is coordinating a major project aiming to bring council (including Suffolk County Council), police and fire services, the Mildenhall College Academy, health and leisure facilities (including a replacement swimming pool), the Department of Work and Pensions, Suffolk West Citizens Advice Bureau, community and voluntary sector organisations together on to one or two sites. Doing so could save over 50% in the running costs of the buildings, as well as reducing the size of the public estate in the town by 15%, even allowing for some new facilities such as a larger pool and space to let to businesses. A business case has been developed for the project to bring the Mildenhall Hub into its next phase and due diligence is being carried out to determine the preferred option and inform the planning process and public consultation.

5. Ensuring the highest possible level of customer service

We are focused on creating a new way to deliver our services and at the heart of this is our Target Operating Model (TOM) which sets out the guiding principle that wherever possible and practical, we will enable customers to access our services through digital channels (known as digital by default).

We acknowledge that going online is not possible for all customers and the new customer services team is now in full operation providing frontline assistance on behalf of most services. We have also created a new West Suffolk website, streamlined our system for handling complaints and continued to increase the number of service queries covered by the Customer Services Team. The team now deals with customer enquiries regarding housing, elections, noise reports, stray dogs, abandoned vehicles, waste collection, landscapes and residential parking permits. Between April and December 2014 we had 107,000 telephone contacts with an average of 93% of calls

answered and 5700 email contacts. This is in addition to providing face-to-face support across five West Suffolk localities where staff had 94,000 customer contacts between April and December 2014 and provided advice on a range of issues including housing, benefits and council tax.

In November 2014 we launched our new West Suffolk website which was a huge step in the shared services journey between Forest Heath and St Edmundsbury. The new website was designed from the customers' point of view and to work on a variety of platforms; mobile, tablet or computer. The councils' website project team reviewed approximately 10,000 webpages and documents on the Forest Heath and St Edmundsbury websites and removed unnecessary documents and information to create the new website with 625 pages and 1831 documents. We have received excellent feedback regarding the clear, concise and easy to navigate website and plans are in place to improve the website further with more online services and mapping functions.

Importantly, the launch of the website coincides with the launch of modern.gov which is the new administration system for committee meetings. The new software brings efficiencies to the production of agendas and reports and documents are now more accessible for viewing online with embedded links to background documents. The new system also introduced a more concise common template to reduce the length of reports whilst retaining all the necessary information.

Following the launch of the website and modern.gov, staff then focused on the development of a new intranet to replace the three existing intranets for Forest Heath, St Edmundsbury and GOLD (the shared intranet). The intranet was launched in March 2015 and will enable staff and councillors to have easier access to all the information they need to work effectively.

The future

As highlighted in this report, we achieved a great deal in 2014/15 and continued to make significant progress against our West Suffolk strategic priorities for 2014-16. We have continued to deliver services and support communities whilst facing challenging economic circumstances. This report also complements our financial reporting, through our statement of accounts, by demonstrating how our wise investment of resources has delivered real outcomes on the ground for our residents.

Looking to 2015/16 and beyond we will work hard to make necessary efficiencies through the six themes outlined in our Medium Term Financial Strategy: http://www.westsuffolk.gov.uk/Council/Finance_and_Statistics/upload/MediumTermFinancialStrategy2014-16.pdf. We will be working beyond the boundaries of West Suffolk through the Suffolk-wide transformation project, supported by funding from the Transformation Challenge Award (TCA). The Department for Communities and Local Government is going to support local authorities, through TCA, to radically transform how they deliver their services. The Suffolk-wide TCA allocation will be used to find new ways to support communities, reduce costs and generate benefits for residents of £19 million over ten years.

We will continue to report on progress against our Strategic Plan and Medium Term Financial Strategy throughout the year on our website: www.westsuffolk.gov.uk and in our next annual report for 2015/16.

Extraordinary Cabinet



Forest Heath
District Council

Title of Report:	Universal Credit Delivery Partnership Agreement	
Report No:	CAB/FH/15/016	
Report to and date/s:	Extraordinary Cabinet	17 March 2015
Portfolio holder:	Stephen Edwards Resources, Governance and Performance Tel: 01638 660518 Email: stephen.edwards@forest-heath.gov.uk	
Lead officer:	Davina Howes Head of Families and Communities Tel: 01284 757070 Email: davina.howes@westsuffolk.gov.uk	
Purpose of report:	To approve the agreement between the Council and the Department for Work and Pension to support the delivery of Universal Credit.	
Recommendation:	<p>It is <u>RECOMMENDED</u> that, Cabinet:</p> <ol style="list-style-type: none"> (1) note the phase one implementation of Universal Credit across West Suffolk; (2) agree the Universal Credit Delivery Partnership Agreement attached at Appendix A; (3) delegate authority to the Head of Families and Communities, in consultation with the Portfolio Holder for Resources and Performance, to negotiate the costs being sought from the Department for Work and Pensions to support the implementation of Universal Credit (Appendix A, Schedule Two); and (4) note that review periods will be arranged with the Department of Work and Pensions in order to assess the actual impact of Universal Credit in the area. 	

<p>Key Decision:</p> <p><i>(Check the appropriate box and delete all those that do not apply.)</i></p>	<p><i>Is this a Key Decision and, if so, under which definition?</i></p> <p>Yes, it is a Key Decision - <input type="checkbox"/></p> <p>No, it is not a Key Decision - <input checked="" type="checkbox"/></p>
<p><i>The decision made as a result of this report will be published within 48 hours and cannot be actioned until seven working days have elapsed. This item is included on the Decisions Plan.</i></p>	
<p>Consultation:</p>	<ul style="list-style-type: none"> Liaison between the council's housing and customer services teams, Anglia Revenues Partnership and the Department for Work and Pensions.
<p>Alternative option(s):</p>	<ul style="list-style-type: none"> The council could choose not to provide advice and support to residents affected by Universal Credit.
<p>Implications:</p>	
<p><i>Are there any financial implications? If yes, please give details</i></p>	<p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p> <ul style="list-style-type: none"> The likely financial impact of supporting the implementation of Universal Credit have will be calculated and detailed in Schedule Two of the attached partnership agreement. This has yet to be agreed with the Department of Work and Pensions. Arrangements are for the financial year 2015/16 only.
<p><i>Are there any staffing implications? If yes, please give details</i></p>	<p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p> <ul style="list-style-type: none"> There are staffing implications for ARP and these costs will be factored into Schedule Two of the Delivery Partnership Agreement. In terms of other council services, particularly customer services and housing, it is anticipated that the majority of the work will involve signposting to support. However, support will need to be given to those customers who need assistance with online access. Staff will require training in order to provide an effective service to residents.
<p><i>Are there any ICT implications? If yes, please give details</i></p>	<p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p>
<p><i>Are there any legal and/or policy implications? If yes, please give details</i></p>	<p>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/></p>

<p><i>Are there any equality implications? If yes, please give details</i></p>		<p>Yes <input checked="" type="checkbox"/> No <input type="checkbox"/></p> <ul style="list-style-type: none"> Universal Credit is a government policy and will have been subject to appropriate equality impact assessment. Staff will need to provide support to those who have difficulty accessing online information. 	
<p>Risk/opportunity assessment:</p>		<p><i>(potential hazards or opportunities affecting corporate, service or project objectives)</i></p>	
Risk area	Inherent level of risk (before controls)	Controls	Residual risk (after controls)
Customers are confused by the implementation of the new system.	Medium	Staff to complete the appropriate training in order to provide and/or signpost to the appropriate organisation.	Low
The number of customers affected by the change is higher than anticipated and cost to the council and ARP increase.	Medium	Regular liaison with DWP to monitor the number of claimants. Agreement includes provision for review should the volume of claimants differ from projections.	Low
<p>Ward(s) affected:</p>		All Wards	
<p>Background papers: <i>(all background papers are to be published on the website and a link included)</i></p>		None	
<p>Documents attached:</p>		Appendix A: Universal Credit Delivery Partnership Agreement.	

1. Key issues and reasons for recommendation(s)

1.1 Background

- 1.1.1 Universal Credit (UC) is a government policy which aims to introduce greater fairness to the welfare system with the intention of ensuring that people are better off in work than on benefits. It is a new benefit for people who are on a low income or are out of work. It replaces six benefits and credits with a single monthly payment for people on a low income or who are out of work. It removes the requirement for an individual to provide similar information to different organisations. It is also intended to be more flexible than the current benefit system by making it easier to take short-term or part-time work. Universal Credit *does not* include the Local Council Tax Reduction Scheme with the administration of this remaining with local authorities.
- 1.1.2 Universal Credit is being introduced in stages and in some parts of the country it is available to single people, couples and families. Since February 2015, the government has accelerated the delivery of Universal Credit rolling out nationally to **single claimants** only.
- 1.1.3 In January 2015, the council was informed that all Jobcentres within Forest Heath and St Edmundsbury would be included in the first tranche of the roll out of Universal Credit with a go live date of 13 April 2015. This means that any new claims for single people (not couples or families) will be assessed under UC. Estimates of the number of claimants likely to be impacted are still being verified and cannot be released at this stage.

1.2 Delivery Partnership Agreement

- 1.2.1 Prior to UC implementation, councils are required to sign a Delivery Partnership Agreement with the Department of Work and Pensions (DWP). The purpose of this Agreement is to establish what local authorities are required to deliver in order to ensure a joined up and coherent journey between services for the claimant. This is an interim arrangement to support the initial roll out of UC but will be subject to review as and when full UC is available to all, including families and couples. The council's Delivery Partnership Agreement is attached as Appendix A.
- 1.2.2 Each council is required to negotiate with the DWP the likely costs it will incur as a result of UC implementation. These costs are based on the projected number of claimants in each council area. The Agreement makes provision for these costs to be reviewed should the number of claimants differ from the projected volumes for any reasons, including a change to the eligibility criteria (Appendix A paragraph 1.10).
- 1.2.3 Once negotiated, Schedule Two of the Delivery Agreement will set out the proposed funding arrangements and the costs that the council will seek from the DWP. Anglia Revenues Partnership (ARP) costs will be included as will any costs for activities likely to be carried out by a third party on behalf of the council. These costs are based on estimated volumes provided by DWP and by a national model which has been used to determine costs of activities.
- 1.2.4 The Delivery Agreement requires that the council includes the likely cost of

providing a Personal Budgeting Service (PBS) to UC claimants as a result of a referral from the Jobcentre. This is not a service that the council provides; rather PBS is provided to residents by third parties, for example, the Citizens Advice Bureau. It is suggested that this arrangement continue, at least for the short term, as the council does not have the capacity to build this expertise within the time available before the launch of UC. Over the next few weeks, discussions will therefore take place with third party providers of this type of advice to establish whether or not they have the capacity to provide PBS. The DWP estimate that 'straightforward' PBS advice takes two hours per person, whilst complex support is estimated to take six hours. At this stage it is not possible to know if these estimates are realistic. Consequently, it is proposed that in agreeing the Delivery Agreement that reviews are undertaken to analyse timings and the consequent impact on the council's and any third party budget. Longer term PBS may be a service which could be commissioned by the council, with funds being sought from the DWP. This matter will be subject to further discussions as part of the council's approach to grants and commissioning.

- 1.2.5 Payment of these costs is dependent on the delivery of the agreed services and activities. Monthly management information and an invoice, including a breakdown of activities, will be submitted to the DWP in order to claim these costs. The council will invoice the DWP for all of its costs and those incurred by ARP and any third party carrying out PBS as a result of UC. It should be noted that funding from the DWP is only guaranteed for one year (2015/16) and no indication has been provided as to the likely arrangements for April 2016 onwards.

2. Anticipated Universal Credit claims and likely costs incurred

- 2.1 The DWP has provided an estimate of the number of claims which are likely to occur across the council area from April 2015 to April 2016. The cost to the council, ARP and any third party have been estimated based on a national cost structure. The council and ARP have more flexibility to agree the likely management and one-off costs and have done so based on an estimate of the likely workload. This information will enable the council to agree with the DWP the costs which will be detailed in Appendix A Schedule two.

3. Next Steps

- 3.1 The council will need to negotiate with the DWP the costs for the activities outlined in Schedule Two of the DPA with an agreement to be in place before 13 April 2015. It is suggested that the Head of Families and Communities be given delegated authority, in consultation with the Cabinet Member for Resources, Governance and Performance, to negotiate and agree these costs.
- 3.2 Discussions will need to take place with third party providers in order to ensure there is sufficient PBS available from 13 April.
- 3.3 The Council and ARP will monitor the implementation of UC following go live in 13 April 2015 and make any necessary adjustments to the DPA.

This page is intentionally left blank

DATED

2015

(1) DEPARTMENT FOR WORK AND PENSIONS

and

(2) [*Insert LA Name...*] COUNCIL

UNIVERSAL CREDIT DELIVERY PARTNERSHIP AGREEMENT

UC DPA final

CONTENTS

1. BACKGROUND.....	3
2. PARTICIPATION IN UC LIVE SERVICE.....	4
3. PAYMENT BY THE DEPARTMENT.....	5
4. MANAGEMENT INFORMATION.....	5
5. GOVERNANCE.....	6
6. CHANGE CONTROL.....	6
7. DATA PROTECTION AND FREEDOM OF INFORMATION.....	7
8. CONFIDENTIALITY.....	7
9. HEALTH & SAFETY.....	7
10. DIVERSITY & EQUALITY.....	8
11. TERMINATION.....	8
12. RIGHTS OF THIRD PARTIES.....	8
13. SEVERABILITY.....	8
14. DISPUTE RESOLUTION.....	9
15. LAW AND JURISDICTION.....	9
16. INTERPRETATION.....	9
SCHEDULE 1 UC Service Provision.....	10
SCHEDULE 2 Funding Arrangements.....	12
SCHEDULE 3 Interpretation.....	14
SCHEDULE 4 Operational Readiness Certificate.....	16
APPENDIX 1 to 4 Personal Budgeting Support (PBS) Arrangements.....	17

THIS AGREEMENT is made on --/--/2015

BETWEEN:-

- (1) Department for Work and Pensions, whose principal place of business is at Caxton House, Tothill Street, London, SW1H 9NA (the 'Department') and
- (2) [Insert LA name and address] ('the Council')

IT IS AGREED as follows:-

1. BACKGROUND

- 1.1. A feasibility review undertaken in the summer of 2012 identified areas of new challenge for claimants of Universal Credit in certain circumstances. These are:
 - Making initial contact through the best channel
 - Getting online to make and then manage their claim
 - Receiving budgeting support to become financially self-sufficient.
- 1.2. Learning from early live running of Universal Credit has also revealed a current requirement for assistance from councils with complex housing cost claims.
- 1.3. From April to October 2013 the Department has had Delivery Partnership Agreements ("DPAs") in place with local authorities in the Pathfinder areas to ensure that people in such circumstances can readily obtain the support they need to access Universal Credit services and to move closer to and into work wherever possible.
- 1.4. Partnership working between agencies involved with providing services to claimants with complex needs is seen as the key enabler to unlocking the potential in claimants with additional requirements.
- 1.5. As part of UC Live Service [**Insert LA Name**] Council have agreed to be a delivery partner from XX/XX/2015 to 31/03/2016 in accordance with this DPA.
- 1.6. The Department will work in partnership with the Council, to deliver the services required by these claimants, following Universal Support – delivered locally (previously Local Support Services) principles, recognising that the Partnership will deliver services (as set out in Schedule1) that are flexible and sensitive to local needs, with the ultimate aim of delivering a joined up and coherent journey between services for the claimant. This Agreement will support national expansion of Universal Credit as an interim arrangement, until the full Universal Support offer is in place.
- 1.7. Partnership working is crucial to the delivery of this Agreement and will lay the foundations upon which the Local Support Services will be developed and delivered.

1.8. The following partnering principles will apply as the Department and the Council move forward.

The Department and the Council are:

- committed to working together to improve performance, efficiency and the quality of claimants' experience of services;
- in agreement that they have key roles to play in identifying, leading and participating in partnerships working;
- in agreement that, wherever possible, partnership working should be based on and leveraged against infrastructure and services that are already in place, building on existing successful partnerships and taking learning from these successful models;
- in agreement that they will continue to seek, through discussion, opportunities to further help to develop, test and trial the early implementation of any jointly agreed initiatives and best practice that will further support the ambitions of the wider Department and the Council and other local authorities in the delivery of Universal Support.

1.9. During the period of this Agreement the Department will continue to accept new claims to UC from claimants, in the designated post code areas, who satisfy the UC eligibility criteria. It is recognised that this claimant group may change as a result of changes in circumstance once the claimant is in receipt of UC.

1.10. Where a subsequent change in the UC eligibility criteria causes the volumes to differ from the projected volumes on which this Agreement is based and or volumes change for any reason, the Department and the Council will enter into discussions to re-negotiate the funding.

2. PARTICIPATION IN UC LIVE SERVICE

2.1 Each of the Department and the Council shall participate in UC Live Service, performing the acts, functions and roles assigned to it by the Parties in accordance with the outline of the services and activities set out in Schedule 1.

2.2 The Council shall inform the Department in writing of the identity of any organisation which the Council employs or engages to assist the Council in performing any act on behalf of the Council or in performing any of the functions or roles of the Council in the UC Live Service.

2.3 Nothing in this Agreement shall be deemed to constitute a partnership under the Partnership Act 1890 or the Limited Partnerships Act 1907, joint venture, agency, interest grouping or any other kind of formal business grouping or entity between the Department and the Council.

3. PAYMENT BY THE DEPARTMENT

- 3.1 The Department will pay the Council on presentation to the Department by the Council of a valid invoice in such form and containing such information as the Department reasonably requires for the costs incurred by the Council in providing those services and activities and in accordance with the funding arrangements set out in Schedule 2. Payment will be subject to validation by the Department which may include additional information being requested by the Department. Invoices must be presented monthly or at agreed intervals.
- 3.2 Subject to clause 3.1 the Department will pay the Council for the costs incurred by the Council in providing the services and undertaking the activities set out in Part 2 of Schedule 1 during the month for which the invoice is presented within 20 working days of the date of the presentation of the invoice
- 3.3 Payment is time bound and invoices need to be submitted promptly. DWP cannot make payment in advance for services that have not been delivered.

4. MANAGEMENT INFORMATION

- 4.1 The Council will provide the following information each month to the Department and on an 'ad-hoc' basis (as agreed by parties on an exceptional basis), in such format and/or media as the Department reasonably requires:
- Number of claims requiring additional support (i.e. one to one assistance needed in order to complete the claim process)
 - Volume of referrals to personal budgeting support received;
 - Volume of referrals to personal budgeting support that resulted in telephone advice by the Council (or provider)
 - Volume of referrals to personal budgeting support that resulted in face to face advice by the Council (or provider)
 - For each claimant, details of:
 - Date referral received from the Department
 - Who delivered Personal budgeting support (the Council or 3rd sector provider)
 - Personal budgeting support provision details – date, channel(s), frequency, offering
 - Outcomes i.e. completed action plan and/or knowledge check
 - Failure of claimants to attend and reason why
 - If alternative payment arrangements can be removed because claimant now able to manage
 - Number of manual applications to Local Council Tax Reduction Scheme processed
 - Number of cases where Universal Credit service centre contacts the Council to complete the evidence gathering or makes checks on the claimant.

5. GOVERNANCE

- 5.1 The services and activities to be undertaken by the Council will be monitored during the life of this Agreement through:
- Monthly review meetings that will take place between the Council and the Department at a working level; and
 - Quarterly review meetings will take place between the Council's Chief Executive, and the District Manager (DWP) or their nominated representatives

Such reviews shall include (but are not limited to) (i) the impact of the services delivered by the Council upon claimants under the UC Live Service; (ii) any specific issues received or raised by either party; (iii) the performance of the wider obligations of the Department and Council under this DPA including any impact on funding; and (iv) any complaints received.

- 5.2 The Council will attend where required the Department's governance meetings as appropriate.
- 5.3 The Council will participate in the Department's evaluation process, to support continuous improvement and inform the future roll out of Universal Credit. This will include interviews of the Council's staff and third party service providers, where appropriate. The feedback from the evaluation interviews will be kept anonymous.
- 5.4 The Department's District Manager and the relevant senior Council Official [**insert title of relevant Council Official**] or other nominees as agreed locally, shall use reasonable endeavours to resolve all issues and differences arising out of or in connection with this Agreement by means of prompt discussions.
- 5.5 If the Council has a query relating to Universal Credit, in the first instance, the Council will attempt to resolve the query from existing guidance. If the query remains unresolved, the Council will complete the LA Issue Resolution Template and forward the query to the [**insert email address set up by District**] inbox for resolution. The Department will seek to resolve queries submitted within 5 working days and in exceptional circumstances within 10 working days except where the query relates to a customer where the query should be resolved as soon as possible and within a maximum of 5 working days.
- 5.6 If the Department has a query relating to UC for the Council to resolve, the Council will seek to resolve queries submitted within 5 working days and in exceptional circumstances within 10 working days except where the query relates to a customer. In these circumstances the query should be resolved as soon as possible and within a maximum of 5 working days.

6. CHANGE CONTROL

- 6.1 Either the Department or the Council may propose a variation to the activities listed, in writing (including but not limited to electronic mail) to the other, and the other shall confirm in writing (including but not limited to electronic mail) to the Party who proposed the variation, whether it agrees or does not agree to the variation as soon as practicable and in any event within 30 calendar days.
- 6.2 Immediately upon agreement by the other in accordance with clause 6.1 above, the Department's nominated signatory and the Council's nominated signatory shall sign a variation whereupon the Parties shall be bound by those terms.

7. DATA PROTECTION AND FREEDOM OF INFORMATION

- 7.1 DWP/Councils are Data Controllers under the Data Protection Act 1998 and are joint Data Controllers for the purposes of Universal Support
- 7.2 DWP and the Council as Data Controllers will comply with the obligations imposed on them by the Seventh Principle of the Data Protection Act by taking appropriate technical, security and organisational measures against unauthorised or unlawful processing of personal data and against accidental loss or destruction of, or damage to, personal data.
- 7.3 DWP and the Council as Data Controllers will ensure they have mechanisms in place to address the issues of physical security, security awareness and training, security management systems development, site-specific information systems security policy and systems specific security policies.
- 7.4 The full detail of each party's responsibilities related to data protection will be set out in a separate Data Sharing Agreement signed by both DWP and the Council.
- 7.5 From time to time either party may receive requests for information relating to this Agreement and/or the UC Live Service. In such event, the other party will do all things reasonably necessary to assist the party who received the request, in meeting the requirements of the Freedom of Information Act 2000 and the Environmental Information Regulations 2004.

8. CONFIDENTIALITY

- 8.1 Both Parties must ensure that they (and any person they employ or engage) only use Confidential Information belonging to the other for the purposes of the UC Live Service and neither Party shall disclose Confidential Information of the other without the other's prior written consent.
- 8.2 Both Parties shall be allowed to disclose Confidential Information to any person who they employ or engage in connection with the UC Live Service provided that that other person is bound by confidentiality obligations substantially the same as those set out in this clause 8.
- 8.3 This clause 8 shall continue to apply after this Agreement has ended but it shall not apply at any time to information which is or comes into the public domain or which is required to be disclosed by law or to an auditor or regulator of a Party.

9. HEALTH & SAFETY

Both Parties shall co-operate with the other to ensure the health, safety and welfare of their employee, customers and visitors. In particular, they shall take all reasonable steps to:

- Inform each other of any risks arising out of each others businesses
- Co-ordinate the emergency procedures, including evacuation arrangements and first aid provision
- Co-ordinate the exchange and management of information in respect of serious offenders, potentially violent persons, staff protection lists and dangerous areas.
- Co-ordinate the collection and management of health and safety management information
- Co-operate with the consultation arrangements, including provision and recognition of Trade Union appointed safety representatives and the remit of safety committees that cover co-location premises.

10. DIVERSITY & EQUALITY

10.1 Both Parties shall ensure that they actively promote equality of opportunity for and good relations between all persons irrespective of their race, gender, gender reassignment, disability, age, sexual orientation or religion or belief. Both Parties commit to providing services that embrace diversity and promotes equality of opportunity and shall ensure that they are embedded in day to day working practices with customers, colleagues and Partners. Both Parties shall ensure that business partners support their commitment to take reasonable steps to:

- Treat each other fairly and with respect
- Promote an environment that is free from discrimination, bullying and harassment and tackle behaviours that breach this
- Promote diversity and equality of opportunity within your respective businesses
- Recognise and value the differences and individual contribution people make.

11. TERMINATION

11.1 Each Party shall have the right to terminate their participation in the UC Live Service at any time by giving 3 month's written notice to the other. Notwithstanding clause 11.2, termination or expiry of the UC Live Service shall be without prejudice to any rights, remedies or obligations of either Party accrued under this Agreement prior to termination or expiry.

11.2 In the event of either Party terminating their involvement under clause 11.1, the Department shall reimburse to the Council any properly and reasonably committed expenditure of the Council which is within the funding envelope set out in Schedule 2 only to the extent that such expenditure has or will have been incurred by the Council and cannot be avoided or mitigated despite the use by the Council of its best endeavours

12. RIGHTS OF THIRD PARTIES

12.1 A person, who is not a Party to this Agreement, has no right to enforce any term of this Agreement.

13. SEVERABILITY

13.1 If any provision of this Agreement is held invalid, illegal or unenforceable for any reason, such provision shall be severed and the remainder of the provisions hereof shall continue in full force and effect as if this Agreement had been executed with the invalid provision eliminated.

14. DISPUTE RESOLUTION

14.1 The Parties shall attempt in good faith to negotiate a settlement to any dispute between them arising out of or in connection with this Agreement within 42 days of a Party notifying the other of the dispute and such efforts shall involve the escalation of the dispute to chief officer level in the Council and Universal Credit Programme director level in the Department.

15 LAW AND JURISDICTION

15.1 Subject to the provisions of clause 14.1, the Department and the Council accept the exclusive jurisdiction of the English courts and agree that this Agreement is to be governed by and construed according to English Law.

16. INTERPRETATION

16.1 Schedule 3 shall have effect.

SIGNED on behalf of the Department)
for Work and Pensions by an)
Authorised Signatory)

Authorised Signatory

SIGNED on behalf of *(Insert LA name)* Council
by an Authorised Officer

Authorised Officer

SCHEDULE 1

UNIVERSAL CREDIT SERVICE PROVISION

PART 1

The Department will:

- provide reasonable support to the Council in the development and implementation of local service provision, Following Universal Support – delivered locally (previously Local Support Services Framework) principles;
- provide timely and relevant guidance and products to inform delivery of local service provision;
- provide timely data to support the Local Council Tax Reduction Scheme.
- perform the acts, functions and roles assigned to it in accordance with the outline of the Personal Budgeting Support Arrangements set out in Part 1 of Appendix 1.

PART 2

The Council will:

- ensure agreed local service provision is available from (Insert date);
- comply with the Department's governance and evaluation processes which are notified to the Council in writing;
- monitor the impact and take appropriate actions to mitigate the impact on current business relating to administering the housing benefit provision as a result of the introduction of UC;
- inform the Department of any potential barriers to the delivery of local service provision;
- participate in discussions with the Department, pursuant to the Partnering Principles, that will further support the ambitions of the wider Department and Local Authorities in the delivery of Universal Support. Where deemed appropriate, and as a result of those discussions, any resultant changes to this Agreement will be subject to agreement in accordance with the Change Control procedures contained in this Agreement.

The Council will undertake the following services and activities:

- Provide support to UC Service Centre staff around housing cost issues that may arise. This will be achieved through:
 - Identifying named points of contact for Universal Credit Service Centre staff
 - Providing expertise for complex housing cost issues
 - Responding to requests for information on UC claimants current housing benefit claim status within 2 working days
 - Complete and return the MGP1 (LA) within 5 working days of receipt of the request. A reminder will be issued after this time has lapsed but the non-return of the completed form may result in an incorrect Universal Credit award.
- Support for claimants to get on-line and stay on line. This will be achieved through:
 - Identifying PC/public internet sites across (***Insert name of Borough or County***) **County**
 - Identifying which of these locations will have trained staff present to provide 'supported access';

- Publicising these services to residents of (*Insert name of area covered, e.g. Town or Borough*);
- Providing the necessary Management Information to support number of claimants assisted.
- Manual processing for Local Council Tax Reduction Scheme. This will be achieved through:
 - Providing the necessary resource to undertake this activity;
 - Manually inputting agreed data into the Council's systems;
 - Responding to the Department's queries around Local Council Tax Reduction Scheme;
 - Providing the necessary Management Information.
- Support for claimants with complex needs and in particular those who require personal budgeting support by performing the acts, functions and roles assigned to it in the outline of the personal budgeting support arrangements set out in Part 2 of Appendix 1. This will be achieved through:
 - Processing personal budgeting support referrals from the Department including those claimants who have alternative payment arrangements;
 - Identifying the appropriate channel, frequency and provider to deliver personal budgeting support (may not be the Council) and referring the claimant to the right place within the set time frame – set at 2 weeks;
 - Providing (or arranging provision of) telephone or face to face Personal budgeting support and follow up action as appropriate;
 - Report the outcomes of Personal budgeting support provision against the agreed outcome measures; knowledge check, budgeting action plan;
 - Providing the necessary Management Information relating to personal budgeting support including the number of claimants assisted;
 - Referring claimants to the Department who need personal budgeting support (but have been missed in the core process);
 - Referring claimants to the Department who may need an alternative payment arrangement e.g. because of rent arrears or vulnerability.
- Work with Universal Credit Programme in preparing landlords'. This will be achieved through:
 - Hosting landlord forum for Universal Credit;
 - Working with landlords to help get claimants on-line
 - Signposting landlord queries to the Department for resolution;
 - Promoting the appropriate use of online channels within the RSL community in (*Insert name of area covered, e.g. Town or Borough*)

SCHEDULE 2

FUNDING ARRANGEMENTS

The total UC cost under this Agreement shall not exceed £xxxk for services delivered to 31 March 2016.

This arrangement is designed to support initial roll out only from February 2015.

Funding is linked to the delivery of the agreed services and activities as set out below (as more particularised in Part 2 of Schedule 1)

The full breakdown of the agreed total cost of UC Live Service roll out in *(Insert LA name)* Council is shown in the table below. (For the avoidance of doubt, in the event that the delivery of a particular service or activity as detailed in the table below exceeds the volumetric on which the costs are based, the total cost of delivery for such service or activity shall not exceed the figure as provided in the corresponding line entitled UC Live Service breakdown of total Cost in the table below):

Exceptionally, where volumes are significantly different, this can be raised by either party for further consideration.

SCHEDULE 2

DPA Costs	Volume Assumptions to March 2016	Payment Basis	Maximum cost to 31 March 2016 £k
On-Line supported access	Xx per month	volumes	
PBS	Xx per month	volumes	
PBS complex	Xx per month	volumes	
LCTRS Manual processes	Xx per month	volumes	
Support for UC Service Centre	Xx per month	Reimburse agreed cost on a monthly basis	
Management 1 st 6 months		Reimburse agreed cost on a monthly basis	
Management 2 nd 6 months		Reimburse agreed cost on a monthly basis	
One off costs if applicable		Agreed costs which are reasonable and proportionate , not capital, novel or contentious nor paid in advance	
Total (excluding VAT)			
Total (including VAT)			

SCHEDULE 3

INTERPRETATION

Unless the context otherwise requires, the following words and expressions shall have the following meanings:-

“Agreement”	means this agreement between the Parties including its schedules.
“Confidential Information”	means information that ought to be considered as confidential (however it is conveyed or on whatever media it is stored), information the disclosure of which would, or would be likely to, prejudice the legitimate interests of any person, and all Personal Data
“Council”	means [<i>Insert LA name</i>] Council
“Data Controller”	bears the meaning ascribed to it in the Data Protection Act 1998.
“Data Processor”	bears the meaning ascribed to it in the Data Protection Act 1998.
“Delivery Partnership Agreement or “DPA”	means a collaborative agreement between the Department and a local authority in which they agree to work together to deliver local support services to Universal Credit claimants and for the avoidance of doubt, use of these words or the word “partnership” in the Agreement is not intended to, or deemed to establish any partnership or joint venture between the Parties to this Agreement, or constitute on any Party the agent of another party or authorise any Party to make or enter into any commitments for or on behalf of any other party.
“Department”	means the Department for Work and Pensions whose principal place of business is at Caxton House, Tothill Street, London SW1H 9NA.
“Local Support Services Framework”	sets out the principles for delivering localised support services to people who might need extra help to make or maintain a claim for Universal Credit. Now known as Universal Support Delivered Locally

“Management Information”	means information of the kinds mentioned in clause 4.
“Pathfinder”	means the localised Universal Credit claimant support services which were provided by one of 4 local authorities in the period 29 April 2013 to 27 October 2013.
“Partnership Principles”	means the principles set out in clause 1.6.
“Party”	means the Department and/or the Council and “Parties” shall be interpreted accordingly.
“Personal Data”	bears the meaning ascribed to it in the Data Protection Act 1998.
“Process”	bears the meaning ascribed to it in the Data Protection Act 1998.
“Universal Credit”	bears the meaning ascribed to that expression by the Welfare Reform Act 2012 and shall be interpreted accordingly.
“UC Live Service ”	means the localised Universal Credit claimant support services which are to be provided by local authorities in the period xx xx 2015 to 31 March 2016, an outline of which is set out in Schedule 1

The interpretation and construction of this Agreement shall be subject to the following provisions:-

words importing the singular meaning include where the context so admits the plural meaning and vice versa and words importing the masculine include the feminine and neuter;

the words "include", "includes" and "including" are to be construed as if they were immediately followed by the words "without limitation";

headings are included in this Agreement for ease of reference only and shall not affect the interpretation or construction of this Agreement;

references in this Agreement to any clause or sub-clause or schedule without further designation shall be construed as a reference to the clause or sub-clause or schedule to this Agreement so numbered; and

in the event and to the extent only of any conflict between the clauses and the content of the schedules, the clauses shall prevail over the content of the schedules.

any reference to a statute, statutory provision or subordinate legislation (“legislation”) shall (except where the context otherwise requires) be construed as referring to such legislation as amended and in force from time to time and to any legislation which re-enacts or consolidates (with or without modification) any such legislation.

Schedule 4

**OPERATIONAL READINESS CERTIFICATE
BUSINESS READINESS CERTIFICATE**

Universal Credit, Local Authority UC Live Service

Universal Credit, Local Authority Business Readiness Certificate Complete prior to Go-Live Date (<i>Insert Date</i>)	
Local Authority:	
Name of the person completing this BRC:	

I can confirm that (*insert LA name*) Council is ready to deliver the services contained within the Delivery Partnership Agreement in support of Universal Credit Live Service from (*insert date*).

Signed _____

Date _____

APPENDIX 1

Outline of Personal Budgeting Support Arrangements

Part 1

The Department will:

- Carry out an initial triage process that will highlight claimants needing budgeting support and/or an alternative payment arrangement.¹
- For those who are unable to self-serve, refer to the Council for provision of budgeting support.
- Ensure claimant consent is obtained to share information with the Council (and providers if applicable) as set out in Appendix 2.
- Provide the Council with details set out in Appendix 3.

Part 2

The Council will:

- Ensure agreed budgeting support provision is available from go-live.
- Deliver relevant learning and development products to support delivery of budgeting support.
- Comply with the Department's governance and evaluation processes.
- Inform the Department of any potential barriers to the delivery of local service provision.

The Council will provide support for claimants who require personal budgeting support. This will be achieved through:

- Processing personal budgeting support referrals from the Department including those claimants who have alternative payment arrangements.
- Identifying the appropriate channel, frequency and provider to deliver personal budgeting support (may not be the Council) and referring the claimant to the right place within the set time frame – set at 2 weeks.
- Providing (or arranging provision of) telephone or face to face personal budgeting support and follow up action as appropriate.
- Report the outcomes of personal budgeting support provision against the agreed outcome measures; knowledge check, budgeting action plan set out in Appendix 4.
- Providing the necessary Management Information relating to personal budgeting support including the number of claimants assisted.

¹ An APA is a method of paying a claimant differently to help them manage their money better when faced with the changes that UC will bring (e.g. fortnightly payments instead of monthly).

APPENDIX A

- Referring claimants to the Department who need personal budgeting support (but have been missed in the triage process).
- Referring claimants to the Department who may need an alternative payment arrangement (e.g. because of rent arrears or vulnerability).

APPENDIX 2

Claimant Consent

Personal Budgeting Support consent form

Name

National Insurance number

Date of birth

You can get support and advice about managing your money. To do this, the Department for Work and Pensions (DWP) needs to give your local council some details about you. The council will use these to arrange an appointment for you. They may share them with partner organisations that provide money and budgeting advice.

The details we share would be your:

- name
- National Insurance number
- date of birth
- address
- contact phone number
- alternative payment arrangement for Universal Credit (if you have one), and when it will be reviewed

Your details will only be shared if you agree to it. The local council and their partner organisations will only use this information to arrange advice and support about managing your money. They will tell the DWP about the support you get.

Declaration:

I agree that:

the DWP can share the details listed above with my local council, so they can arrange money advice and support for me

my local council can give the DWP details about the support and advice I get, and how it has helped me

I understand that I can withdraw this consent at any time by phoning Universal Credit on 0845 600 0723.

Signed

Date

Name (print)

Adviser.....

Date.....

You can find out more about how the DWP uses your information at <http://www.dwp.gov.uk/privacy-policy/>

APPENDIX 3

Information Supplied to the Council

Following the initial budgeting support triage process carried out by the Department, those claimants deemed as needing budgeting support will be referred to the Council by the Department and will provide the following information:

- Name.
- National Insurance Number.
- Date of birth.
- Address.
- Telephone contact details.
- Whether an alternative payment arrangement is in place and if so;
- The review date set.

APPENDIX 4

Information Supplied to the Department

Part 1

Outcome Report of LA Money Advice Provision

Info provided by DWP (via email or phone referral)

Claimant's Name:	
NINo:	
Local Authority receiving the referral:	
DWP Live Service office:	
Reason for Money Advice referral (Select one reason only)	PBS need identified by DWP <input type="checkbox"/> (no APA need identified) Possible APA need identified by DWP <input type="checkbox"/> (please specify APA type) MFP <input type="checkbox"/> MPTL <input type="checkbox"/> Split <input type="checkbox"/>
Date this form completed:	

For completion by LA

Questions		
1.	Was this a self-referral from the claimant?	Yes <input type="checkbox"/> No <input type="checkbox"/>
2.	Date you received the referral	/ /
3.	Were you able to contact the claimant? *	Yes <input type="checkbox"/> No <input type="checkbox"/>
4.	Has the claimant changed LA (but are still within the Live Service area)	Yes <input type="checkbox"/> No <input type="checkbox"/>
4.	Did the claimant attend their Money Advice session? **	Yes <input type="checkbox"/> No <input type="checkbox"/>
6.	Which Money Advice provider did you refer the claimant to? Give the Provider name(s)	1. 2. 3.
7.	What service(s) did the provider offer the claimant?	
8.	Channel of support	1. A mix of phone and face to face? <input type="checkbox"/> Number of phone contacts? <input style="width: 40px; height: 20px;" type="text"/> Number of face to face contacts <input style="width: 40px; height: 20px;" type="text"/>

		<p>2. Face to face only? <input type="checkbox"/></p> <p>3. Telephone only? <input type="checkbox"/></p> <p>4. Other e.g. group session such as a Budgeting Club? <input type="checkbox"/></p> <p>Please specify:</p> <div data-bbox="858 728 1310 922" style="border: 1px solid black; height: 87px; width: 283px;"></div>
<p>9.</p>	<p>How many interviews did they have?</p>	<p>1. Face to face <input type="checkbox"/> How many? <input type="text"/></p> <p>2. Telephone <input type="checkbox"/> How many? <input type="text"/></p> <p>3. A mix of phone and face to face <input type="checkbox"/> How many by phone? <input type="text"/> How many face to face? <input type="text"/></p> <p>4. Other e.g. group session such as a Budgeting Club <input type="checkbox"/></p> <p>Please specify</p> <div data-bbox="849 1937 1305 2101" style="border: 1px solid black; height: 73px; width: 286px;"></div>

10.	What type of Money Advice did this claimant get?	<ol style="list-style-type: none"> 1. Understanding the key UC financial changes <input type="checkbox"/> 2. How to work out monthly income <input type="checkbox"/> 3. How to work out monthly outgoings <input type="checkbox"/> 4. How to complete a budgeting plan <input type="checkbox"/> 5. How to maintain a budgeting plan <input type="checkbox"/> 6. How to get a bank account <input type="checkbox"/> 7. How to set up a direct debit <input type="checkbox"/> 8. Understanding priority bills <input type="checkbox"/> 9. How to cut back on non-essentials <input type="checkbox"/> 10. Where to get more help <input type="checkbox"/> 11. Other Money Advice – please give details:

11.	Did the claimant complete a Budgeting Action Plan?	Yes <input type="checkbox"/> No <input type="checkbox"/>
12.	Was / is the claimant part of any additional on-going Budgeting Support programmes prior to claiming Universal Credit? (please specify)	
13.	If an APA is in place, does the claimant feel in a position to have the APA reviewed?	Yes <input type="checkbox"/> No <input type="checkbox"/> If APA is still appropriate, is the claimant undertaking long term support to help with root cause issues? No <input type="checkbox"/> Yes <input type="checkbox"/> If yes, please specify: <div data-bbox="868 1402 1302 1541" style="border: 1px solid black; height: 60px; width: 100%;"></div>

*If answer here is 'no', return the form at this point. NB at least 3 attempts to contact the claimant should have been made.

** If answer here is 'no', return the form at this point. This includes dropping out part way through a course of sessions

Return this form via e-mail to: Linda.j.roberts@dwp.gsi.gov.uk

APPENDIX 4

Information Supplied to the Department

Part 2

Knowledge Check

Following completion of budgeting support, the Council will conduct a check with the claimant and provide the following information:

Your Name:	
Your National Insurance Number:	
Q1. Did the advice session(s) on money matters help you feel more confident about managing your money and paying your bills? (Please tick one)	1. Yes 2. No

<p>answer)</p>	<p>3. Don't know</p>
<p>Q2. Do you think you'll be able to manage your money on a monthly basis?</p>	<p>1. Yes 2. No 3. Not sure</p>
<p>Q3. Have the advice session(s) encouraged you to seek further advice about managing your money?</p>	<p>1. Yes 2. No</p> <p>If you answered Yes, go to Q4 If you answered No, go to Q5</p>
<p>Q4. Who would you go to in the future if you need more help managing your money?(If you would like to give more than one answer please put the most important at the top)</p>	<p>1..... 2..... 3.....</p>
<p>Q5. What do you think is the most important bill you have to pay? (please specify in order of importance)</p>	<p>1..... 2..... 3.....</p>
<p>Q6. What do you think you will do with your budgeting action plan?</p>	<p>1. Keep it in case I want to look at it again 2. Update it regularly with my income and outgoings 3. Throw it away when I leave here as I</p>

APPENDIX A

	won't need it again.
--	----------------------