

Notice of Meeting
Cabinet



Date & time

Tuesday, 28
March 2023 at
2.00 pm

Place

Council Chamber,
Surrey County
Council,
Woodhatch Place,
11 Cockshot Hill,
Reigate,
Surrey,
RH2 8EF

Contact

Huma Younis or Andre
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We're on Twitter:
@SCCdemocracy

Cabinet Members: Natalie Bramhall, Clare Curran, Kevin Deanus, Matt Furniss, Marisa Heath, David Lewis, Sinead Mooney, Mark Nuti, Tim Oliver and Denise Turner-Stewart

Deputy Cabinet Members: Maureen Attewell, Jordan Beech, Paul Deach and Rebecca Paul

If you would like a copy of this agenda or the attached papers in another format, e.g. large print or braille, or another language please email Huma Younis on huma.younis@surreycc.gov.uk or andre.ferreira@surreycc.gov.uk.

This meeting will be held in public. If you would like to attend and you have any special requirements, please contact Huma Younis on 07866899016.

Please note that public seating is limited and will be allocated on a first come first served basis.

AGENDA

1 APOLOGIES FOR ABSENCE

2 MINUTES OF PREVIOUS MEETING: 31 JANUARY 2023

(Pages 1
- 18)

To agree the minutes of the last meeting as a correct record of the meeting.

3 DECLARATIONS OF INTEREST

All Members present are required to declare, at this point in the meeting or as soon as possible thereafter:

- (i) Any disclosable pecuniary interests and / or
- (ii) Other interests arising under the Code of Conduct in respect of any item(s) of business being considered at this meeting

NOTES:

- Members are reminded that they must not participate in any item where they have a disclosable pecuniary interest
- As well as an interest of the Member, this includes any interest, of which the Member is aware, that relates to the Member's spouse or civil partner (or any person with whom the Member is living as a spouse or civil partner)
- Members with a significant personal interest may participate in the discussion and vote on that matter unless that interest could be reasonably regarded as prejudicial.

4 PROCEDURAL MATTERS

a Members' Questions

The deadline for Member's questions is 12pm four working days before the meeting (22 March 2023).

b Public Questions

The deadline for public questions is seven days before the meeting (21 March 2023).

c Petitions

The deadline for petitions was 14 days before the meeting, and no petitions have been received.

d Representations received on reports to be considered in private

To consider any representations received in relation why part of the meeting relating to a report circulated in Part 2 of the agenda should be open to the public.

- 5 REPORTS FROM SELECT COMMITTEES , TASK GROUPS, LOCAL COMMITTEES AND OTHER COMMITTEES OF THE COUNCIL** (Pages 19 - 26)
- To consider any reports from Select Committees, Task Groups, Local Committees and any other Committees of the Council.
- A. Surrey Strategy for Accommodation, Housing and Homes (Communities, Environment and Highways Select Committee)
 - B. A Housing, Accommodation And Homes Strategy For Surrey (Children, Families, Lifelong Learning And Culture Select Committee)
 - C. Delivering In Partnership: Towns – The Next Phase (Communities, Environment and Highways Select Committee)
- 6 LEADER / DEPUTY LEADER / CABINET MEMBER/ STRATEGIC INVESTMENT BOARD DECISIONS TAKEN SINCE THE LAST CABINET MEETING** (Pages 27 - 30)
- To note any delegated decisions taken by the Leader, Deputy Leader, Cabinet Members, Strategic Investment Board and Committees in Common Sub-Committee since the last meeting of the Cabinet.
- 7 CABINET MEMBER OF THE MONTH** (Pages 31 - 34)
- To receive an update from Sinead Mooney, Cabinet Member for Children and Families.
- 8 DELIVERING IN PARTNERSHIP: TOWNS - THE NEXT PHASE** (Pages 35 - 56)
- The report seeks Cabinet approval for the proposed extension of the towns programme, of delivering in partnership in the identified prioritised towns and for the way of working in priority towns, especially the ongoing engagement with and role of elected representatives in those towns.
- (The decisions on this item can be called-in by the Communities, Environment and Highways Select Committee)*
- 9 A HOUSING, ACCOMMODATION AND HOMES STRATEGY FOR SURREY** (Pages 57 - 128)
- This report sets out a draft strategy for Housing, Accommodation and Homes for Surrey, for adoption and promotion by the County Council.
- (The decisions on this item can be called-in by the Communities, Environment and Highways Select Committee)*
- 10 SEND CAPITAL PROGRAMME 2023/24 DELIVERY** (Pages 129 - 142)
- Cabinet approval is sought for use of £100.2m of the total agreed future SEND Capital Funding of £202m approved in January 2023. The capital investment is for twenty SEND Capital Programme projects where viable schemes, locations and costs have been confirmed.
- (The decisions on this item can be called- in by the Children, Families, Lifelong Learning & Culture Select Committee)*

N.B There is a Part 2 report at Item 20.

- 11 'PATHWAYS TO EMPLOYMENT: SUPPORTING SURREY RESIDENTS' SKILLS DEVELOPMENT AND EMPLOYABILITY THROUGH IMPROVED CAREERS PROVISION** (Pages 143 - 152)

This report sets out a programme of work that follows on from and supplements the recently launched Surrey Skills Plan and the upcoming Lifetime of Learning education strategy and includes additional key operational activity that will support the ambitions of both these documents as well as delivering on multiple outcomes across educational equity, economic growth and opportunity for all.

(The decisions on this item can be called- in by the Communities, Environment and Highways Select Committee or the Children, Families and Lifelong Learning Select Committee)

- 12 LOCAL GOVERNMENT AND SOCIAL CARE OMBUDSMAN PUBLIC REPORT REGARDING CONCERNS ABOUT THE DELIVERY OF EDUCATION FOR CHILDREN WITH ADDITIONAL NEEDS AND DISABILITIES (SEND)** (Pages 153 - 194)

Cabinet is asked to consider the Ombudsman's report, the steps that will be taken by the Service to address the findings and to Consider whether any other action should be taken.

- 13 RE-MODELLING THE STRATEGIC SHORT BREAKS OFFER FOR ADULTS WITH LEARNING DISABILITIES AND/OR AUTISM** (Pages 195 - 230)

Cabinet is asked to approve the proposal to re-model the Council's Strategic Short Breaks offer by working with the market to ensure a more diverse Short Breaks offer.

(The decisions on this item can be called-in by the Adults and Health Select Committee)

N.B There is a Part 2 report at Item 21.

- 14 ELECTRIC TOWNS AND CITIES INITIATIVE (ETCI) A3 AIR QUALITY PROJECT** (Pages 231 - 244)

Cabinet is asked to Approve the receipt of £11m grant funding from National Highways for the A3 air quality scheme through the Electric Towns and Cities Initiative, and proceed with the scheme subject to the approval of a detailed business case by the Council's Capital Programme Panel.

(The decisions on this item can be called-in by the Communities, Environment and Highways Select Committee)

- 15 FUTURE BUS NETWORK REVIEW AND LOCAL BUS SERVICE INVESTMENT** (Pages 245 - 324)

In considering the need to adapt and change certain bus services, our planned investment to grow patronage and our plans to expand Digital Demand Responsive Transport (DDRT), the council completed a comprehensive consultation exercise that enabled residents and

stakeholders to have their say on Investment in infrastructure, Maintaining or changing bus services to better reflect use and more Digital Demand Responsive Transport services. This report sets out the process and outcome of the consultation, with more than 2,600 responses received, which have been used to shape the recommendations and way forward.

(The decisions on this item can be called- in by the Communities, Highways and Environment Select Committee)

- 16 STRATEGIC INVESTMENT BOARD ANNUAL REPORT - FINANCIAL YEAR 2021/22 WITH 2022/23 MID YEAR UPDATE** (Pages 325 - 358)

Cabinet is asked to endorse the Annual Report of the Strategic Investment Board.

(The decisions on this item can be called-in by the Resources and Performance Select Committee)

N.B There is a Part 2 annex at Item 22.

- 17 YOUR FUND SURREY- CF118 MASTER PARK COMMUNITY PAVILION** (Pages 359 - 366)

This report sets out the key information on the Master Park Community Pavilion Your Fund Surrey (YFS) application, for the consideration of Cabinet.

(The decisions on this item can be called -in by the Communities, Environment and Highways Select Committee)

- 18 2022/23 MONTH 10 (JANUARY) FINANCIAL REPORT & 2023/24 FEES AND CHARGES REVIEW** (Pages 367 - 386)

This report provides details of the County Council's 2022/23 financial position as at 31st January 2023 (M10) for revenue and capital budgets and the expected outlook for the remainder of the financial year. It also outlines the outcomes from an extensive review of 2023/24 Fees & Charges.

(The decisions on this item can be called-in by the Resources and Performance Select Committee)

- 19 EXCLUSION OF THE PUBLIC**

That under Section 100(A) of the Local Government Act 1972, the public be excluded from the meeting during consideration of the following items of business on the grounds that they involve the likely disclosure of exempt information under the relevant paragraphs of Part 1 of Schedule 12A of the Act.

PART TWO - IN PRIVATE

- 20 SEND CAPITAL PROGRAMME 2023/24 DELIVERY** (Pages 387 - 394)
- This Part 2 report contains information which is exempt from Access to Information requirements by virtue of paragraph 3, Information relating to the financial or business affairs of any particular person (including the authority holding that information).
- (The decisions on this item can be called- in by the Children, Families, Lifelong Learning & Culture Select Committee)*
- 21 RE-MODELLING THE STRATEGIC SHORT BREAKS OFFER FOR ADULTS WITH LEARNING DISABILITIES AND/OR AUTISM** (Pages 395 - 402)
- This Part 2 report contains information which is exempt from Access to Information requirements by virtue of paragraph 3, Information relating to the financial or business affairs of any particular person (including the authority holding that information).
- (The decisions on this item can be called-in by the Adults and Health Select Committee)*
- 22 STRATEGIC INVESTMENT BOARD ANNUAL REPORT - FINANCIAL YEAR 2021/22 WITH 2022/23 MID YEAR UPDATE** (Pages 403 - 416)
- This Part 2 report contains information which is exempt from Access to Information requirements by virtue of paragraph 3, Information relating to the financial or business affairs of any particular person (including the authority holding that information).
- (The decisions on this item can be called- in by the Resources and Performance Select Committee)*
- 23 PUBLICITY FOR PART 2 ITEMS**
- To consider whether the item considered under Part 2 of the agenda should be made available to the Press and public.

Joanna Killian
Chief Executive
Monday, 20 March 2023

MOBILE TECHNOLOGY AND FILMING – ACCEPTABLE USE

Members of the public and the press may use social media or mobile devices in silent mode during meetings. Public wifi is available.

Anyone is permitted to film, record or take photographs at Council meetings. Please liaise with the committee manager listed in the agenda prior to the start of the meeting so that the meeting can be made aware of any filming taking place.

The use of mobile devices, including for the purpose of recording or filming a meeting, is subject to no interruptions, distractions or interference being caused to any Council equipment or any general disturbance to proceedings. The Chairman may ask for mobile devices to be switched off in these circumstances.

If you are not using your mobile device for any of the activities outlined above, it must be switched off or placed on silent mode during the meeting to prevent interruptions and interference with Council systems.

Thank you for your co-operation.

QUESTIONS AND PETITIONS

Cabinet and most committees will consider questions by elected Surrey County Council Members and questions and petitions from members of the public who are electors in the Surrey County Council area.

Please note the following regarding questions from the public:

1. Members of the public can submit one written question to a meeting. Questions should relate to general policy and not to detail. Questions are asked and answered in public and cannot relate to “confidential” or “exempt” matters (for example, personal or financial details of an individual); for further advice please contact the committee manager listed on the front page of an agenda.
2. The number of public questions which can be asked at a meeting may not exceed six. Questions which are received after the first six will be held over to the following meeting or dealt with in writing at the Chairman’s discretion.
3. Questions will be taken in the order in which they are received.
4. Questions will be asked and answered without discussion. The Chairman or Cabinet members may decline to answer a question, provide a written reply or nominate another Member to answer the question.
5. Following the initial reply, one supplementary question may be asked by the questioner. The Chairman or Cabinet members may decline to answer a supplementary question.

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**MINUTES OF THE MEETING OF THE CABINET
HELD ON 31 JANUARY 2023 AT 2.00 PM
IN THE COUNCIL CHAMBER, SURREY COUNTY COUNCIL,
WOODHATCH PLACE, 11 COCKSHOT HILL, REIGATE, SURREY ,RH2
8EF.**

These minutes are subject to confirmation by the Cabinet at its next meeting.

Members: *= Present

*Tim Oliver (Chairman)
*Natalie Bramhall
*Clare Curran
*Matt Furniss
*David Lewis
Mark Nuti
*Denise Turner-Stewart
*Sinead Mooney
*Marisa Heath
*Kevin Deanus

Deputy Cabinet Members:

*Maureen Attewell
*Rebecca Paul
*Paul Deach
*Jordan Beech

Members in attendance:

John O'Reilly, Chairman of the Communities, Environment and Highways Select Committee
Nick Darby, Chairman of the Resources and Performance Select Committee
Liz Bowes, Chairman of the Children, Families, Lifelong Learning and Culture Select Committee
Helyn Clack, Chairman of the Council
Jonathan Essex, Member for Redhill East
Catherine Baart, Member for Earlswood and Reigate South

**PART ONE
IN PUBLIC**

1/23 APOLOGIES FOR ABSENCE [Item 1]

Apologies were received from Mark Nuti.

2/23 MINUTES OF PREVIOUS MEETING: 20 DECEMBER 2022 [Item 2]

These were agreed as a correct record of the meeting.

3/23 DECLARATIONS OF INTEREST [Item 3]

David Lewis declared a non-pecuniary interest for Item 16 stating that he was the borough member for Oxshott and Stoke d'Abernon and had historically been involved with the Oxshott scout group which was part of the application.

4/231 PROCEDURAL MATTERS [Item 4]**4/23 MEMBERS' QUESTIONS [Item 4a]**

There were six member questions. The questions and responses were published as a supplement to the agenda.

With regards to his first question Jonathan Essex asked if there was anything more that the council could do to support the NHS in clearing its backlog. The Leader explained that two funds had been allocated by the government for discharge. There was conversation between the council and Surrey Heartlands on how to progress this. The Leader explained that the issue was complex and only 30% of people being discharged from hospital went onto access the social care system with the remaining 70% being self-funders. £6 million had gone into finding ways of speeding up the discharge process with staffing being a key issue here.

With regards to his second question Jonathan Essex asked if the council could indicate the scale of private brokerage of care homes that the NHS was using in Surrey and whether the council had offered recently vacated adult social care homes that might be repurposed by the NHS. The Leader stated that the properties Surrey had could not be repurposed and not in the timescale required.

With regards to his third question Jonathan Essex asked for the number of people who were in care beds in provision we had recently let go and where their next destination was and if this was either independent living and extra care provision. The Leader stated that a written reply would be provided to the member.

Catherine Baart asked a supplementary to her original question which was for the number of accompanied asylum seeker children who were living in hotels in Surrey with either their parents and/or adults. The Leader stated that a written reply would be provided to the member.

5/23 PUBLIC QUESTIONS [Item 4b]

There were two public questions. The questions and responses were published as a supplement to the agenda.

Elizabeth Daly asked if a levelling up bid had been submitted to support concessionary travel schemes. The Deputy Leader and Cabinet Member for Communities and Community Safety stated that the council website had been updated to identify Bookham library as having slots to book appointments for bus passes. A new member of staff had also joined the team which would speed up the process. The Cabinet Member for Transport, Infrastructure and Growth stated that Surrey had applied for levelling up funding a number of times and had been unsuccessful. The council had just finished a bus consultation which would look at delivering a better bus service across the county. The council would be introducing a half price under 20s scheme to follow the £2 fair cap starting on 3 April. The council could not afford the TfL offer but would continue to provide as much of a cheap, efficient and reliable service on our best network as possible.

Paul Kennedy asked the following supplementary in relation to his original question, stating that the response from the Cabinet Member stated there would be a cabinet paper in the summer seeking feasibility funding for development of the Keswick Care Home and other sites. Paul Kennedy asked what these "other sites" were and if these were in reference to other care homes that were closed at the same time, or to other local sites such as the former Bookham Youth Centre and perhaps the Rentwood site in Fetcham. The Cabinet Member for Children and Families stated that the report coming to Cabinet in summer would include the seven care homes that had been closed.

6/23 PETITIONS [Item 4c]

There were none.

7/23 REPRESENTATIONS RECEIVED ON REPORTS TO BE CONSIDERED IN PRIVATE [Item 4d]

There were none.

8/23 REPORTS FROM SELECT COMMITTEES , TASK GROUPS, LOCAL COMMITTEES AND OTHER COMMITTEES OF THE COUNCIL [Item 5]

The Chairman of the Resources and Performance Select Committee, Chairman of the Communities, Environment and Highways Select Committee and Chairman of the Children, Families, Lifelong Learning and Culture Select Committee spoke on the recommendations presented by the Select Committees on the budget. They recognised that all local authorities had huge and significant pressures and specifically rising inflation. The Chairman of the Communities, Environment and Highways Select Committee spoke about hyperinflation association with highways. The Chairman was pleased to see that additional capital funding would be identified to ensure delivery of schemes associated with members allocation. More lobbying should be encouraged with government around highways funding. The Children, Families, Lifelong Learning and Culture Select Committee welcomed the initiatives that had been introduced such as retention payment policy and was happy that the directorate was considering market rates supplements for social workers in the family safeguarding team. The Leader thanked the Select Committees for their diligent work on the budget. The joint recommendations from the Select Committees were welcomed.

The Children, Families, Lifelong Learning and Culture Select Committee Chairman thanked the Cabinet Member for the response to the home to school travel assistance and learning review and explained that Family Voice had seen improvements with the transport team via feedback from parents. The Cabinet Member for Education and Learning welcomed the positive feedback.

The Children, Families, Lifelong Learning and Culture Select Committee Chairman thanked the Cabinet Member for the response to the draft inclusion and additional needs strategy. The Cabinet Member for Education and Learning stated an easy read version would be produced and thanked the Select Committee for their constructive comments on the strategy.

RESOLVED:

That the three Select Committee reports be noted and recommendations considered.

9/23 LEADER / DEPUTY LEADER / CABINET MEMBER/ STRATEGIC INVESTMENT BOARD DECISIONS TAKEN SINCE THE LAST CABINET MEETING [Item 6]

The decisions taken since the last Cabinet meeting were considered.

RESOLVED:

That the decisions taken since the last Cabinet meeting be noted.

10/23 CABINET MEMBER OF THE MONTH [Item 7]

The Cabinet Member for Transport, Infrastructure and Growth announced that he had written to the Mayor of London and Transport for London (TfL) setting out his disappointment that TfL and the Mayor's office were proceeding with plans to expand the Ultra Low Emission Zone (ULEZ) right up to the boundary of Surrey with the complete absence of any meaningful conversation on the impacts on Surrey residents. A detailed response to the ULEZ expansion had been sent to TfL but no response has been received. If TfL wanted to proceed with expanding and installing any equipment or signage to Surrey Highways around advanced warning then they would need to commence meaningful discussions with the council. The Leader reinforced the need for TfL to have a conversation with the council on the impacts of ULEZ for Surrey residents and businesses. The council had the legal power to prevent the Mayor of London putting up signage on Surrey highways.

The Cabinet Member for Transport, Infrastructure and Growth stated that the Future Bus Network consultation ran from 3 November to 6 January and received over 2,500 responses from the public and stakeholders. This would help us shape what the future bus network would look like. Cabinet had recently approved the third phase of schemes to be progressed as part of Surrey's Infrastructure Plan (SIP). Adopted in February 2021 following its development with District and Borough Council's, the SIP provided for a rolling process of moving schemes from concept to design to implementation and ensures there is a healthy pipeline of schemes developed to a 'shovel ready' stage. On 10 November, the council hosted the inaugural Surrey Skills Summit, bringing together local business leaders, employers, colleges, universities, skills providers and local government officials to help us take the next step in collaborating to create a more inclusive and dynamic skills system in Surrey. The event was energised and there was a commitment from all stakeholders on delivering skills for the future.

RESOLVED:

That the Cabinet Member of the Month update be noted.

11/23 REFRESH OF THE ORGANISATION STRATEGY 2023- 2028 [Item 8]

The refreshed organisation strategy was introduced by the Leader who explained that the strategy being presented was from 2023-2028 but was a living document which would be updated regularly. The strategy explains how the council would deliver the 2030 Community vision which was a vision built up with all of our partners across the county. There were four strategic priority areas within the strategy which the council aimed to deliver and would have the greatest impact on tackling inequality and improving outcomes for people living and working in the county. The Leader stated that Surrey was diverse with a 10 year difference in life expectancy for males and 14 year difference in life expectancy for females in parts of the county. The council needed to do more to help people improve their own health and help the most vulnerable groups in Surrey. The Leader stated that the council must tackle all forms on inequality including inequality of opportunity, inequality of life expectancy and inequality of access to key support services. The Leader thanked the Chief Executive and officer for being at the frontline and delivering this strategy.

The Deputy Cabinet Member for Levelling Up proposed a change to the Organisation Strategy under the equality diversity and inclusion paragraph to take into account previous discussions that had taken place. It was agreed that the current text in the second paragraph and from the second sentence onwards would be replaced with the following “For staff, the Council recognises the importance of a diverse workforce and is committed to providing a culture where everyone is valued and respected. People should feel comfortable carrying out their roles and the Council is committed to equality of opportunity being practised and promoted to all”. This change was agreed by the Cabinet.

RESOLVED:

1. That Cabinet commend the updated version of the Organisation Strategy to Council subject to the amendment agreed.

Reasons for Decisions:

The Organisation Strategy is updated at least every two years to ensure that Surrey County Council’s plan for delivering under the Community Vision for Surrey 2030 remains up-to-date and relevant to the changes in circumstance of the county.

(The decisions on this item can be called in by the Resources and Performance Select Committee)

12/23 2023/24 FINAL BUDGET AND MEDIUM-TERM FINANCIAL STRATEGY TO 2027/28 [Item 9]

The report was introduced by the Leader who explained that the rise in inflation had put a huge amount of pressure on setting the budget for the year. The work the council had undertaken on its finances over the past few years has set the council up in a strong position for the year. It was explained that the budget being presented would not cut frontline core services and there would be a 2.99% increase to the council tax which is lower than the 5% increase some local authorities were proposing. The production of the 2023/24 budget had been developed through an integrated approach across Corporate Strategy, Transformation and Finance, aligning revenue budgets, capital investment and transformation plans with each Directorate’s service

plans and the corporate priorities of the organisation. The council was investing over £300 million in capital projects over this next year which would be £1.9 billion over the period of the medium term financial strategy. This would be investing in our schools, in specialist facilities for those children that have additional needs, building accommodation for our looked after children so that they can be closer to home and building independent living facilities so people can live independently for longer. The final budget for 2023/24 proposes total funding of £1,101.5m; an increase of £61.4m from 2022/23.

The Cabinet Member for Finance and Resources explained that a responsible budget which allows the council to deliver frontline services and at the same time put aside contingency funds had been developed. There was a recognition of the issues facing residents and an exciting capital programme had been agreed. Officers were thanked for hard work in getting the budget to this stage. There was support from the Cabinet on the proposed budget. Members highlighted that many councils would be retracting from investment where as Surrey would continue to fund capital programmes.

RESOLVED:

That Cabinet makes the following recommendations to Council on 7 February 2023.

Cabinet recommends that Council:

1. Approves the net revenue budget requirement be set at **£1,101.5 million** (net cost of services after service specific government grants) for 2023/24 (Annex B), subject to confirmation of the Final Local Government Financial Settlement.
2. Approves the total Council Tax Funding Requirement be set at **£866.0 million** for 2023/24. This is based on a council tax increase of 2.99%, made up of an increase in the level of core council tax of 0.99% and an increase of 2% in the precept proposed by Central Government to cover the growing cost of Adult Social Care (Annex E).
3. Notes that for the purpose of section 52ZB of the Local Government Finance Act 1992, the Council formally determines that the increase in core council tax is not such as to trigger a referendum (i.e. not greater than 3%).
4. Sets the Surrey County Council precept for Band D Council Tax at £1,675.08, which represents a 2.99% uplift. This is a rise of £0.94 a week from the 2022/23 precept of £1,626.39. This includes £217.94 for the Adult Social Care precept, which has increased by £32.46. A full list of bands is as follows:

**Council tax by valuation band
2023/24**

Valuation band	Core precept	ASC precept	Overall precept
A	£971.43	£145.29	£1,116.72
B	£1,133.33	£169.51	£1,302.84
C	£1,295.24	£193.72	£1,488.96
D	£1,457.14	£217.94	£1,675.08
E	£1,780.95	£266.37	£2,047.32
F	£2,104.76	£314.80	£2,419.56
G	£2,428.57	£363.23	£2,791.80
H	£2,914.28	£435.88	£3,350.16

5. Notes that underlying General Fund Balances are projected to remain at £48 million as of 1 April 2023.
6. Approves the Total Schools Budget of £599.3 million to meet the Council's statutory requirement on schools funding (as set out in Section 9 of the 2023/24 Final Budget and Medium-Term Financial Strategy to 2027/28).
7. Approves the overall indicative Budget Envelopes for Directorates and individual services for the 2023/24 budget (Annex B).
8. Approves the total £1,950.4 million proposed five-year Capital Programme (comprising £1,202.4 m of budget and £748.0m pipeline) and approves the £308.7 million Capital Budget in 2023/24 (Annex C).
9. Approves the Capital and Investment Strategy (Annex F - Sections 1 to 3), which provides an overview of how risks associated with capital expenditure, financing and treasury will be managed as well as how they contribute towards the delivery of services.
10. Approves the policy for making a prudent level of revenue provision for the repayment of debt (the Minimum Revenue Provision (MRP) Policy) (Annex G).
11. Agrees the Council's refreshed Transformation and Cross Cutting Efficiency Programme (as set out in section 3 of 2023/24 Final Budget Report and Medium-Term Financial Strategy to 2027/28)
12. Note that the investment in Transformation required to deliver improved outcomes and financial benefits is built into the proposed Medium-Term Financial Strategy (as set out in section 3 of 2023/24 Final Budget Report and Medium-Term Financial Strategy to 2027/28).
13. Cabinet notes that the Audit & Governance Committee has approved Treasury Management Strategy and Prudential Indicators (Annex F – Section 4) which set a framework for the Council's treasury function to manage risks, source borrowing and invest surplus cash on 24 January 2023.

Reasons for Decisions:

Council will meet on 7 February 2023 to agree a budget and to set the Council Tax Precept for 2023/24. Cabinet is required to recommend a budget

to Council for consideration at this meeting. The budget directs available resources to support the achievement of the Council's ambitions and priorities in the 2030 Vision and the Refreshed Organisation Strategy.

The budget will also support the delivery of the continuing transformational changes that are required to ensure that the Council can improve priority outcomes for residents, while managing growing demand for services and ensuring future financial sustainability.

(The decisions on this item can be called in by the Resources and Performance Select Committee)

13/23 SURREY COUNTY COUNCIL PEOPLE STRATEGY 2023- 2028 [Item 10]

The report was introduced by the Leader who explained that the council's new draft People Strategy 2023-2028 outlined how the council would develop its workforce and be better equipped to address recruitment and retention issues, seeking to ensure that all staff have access to career pathways and development opportunities, to keep the right staff with the right skills to continue delivering outstanding services to residents. The Leader was clear that the council was reliant on its staff but had to do more to support career progression and career opportunities. The People Strategy sets out four key outcomes for the workforce that will equip the council with the staff it needs now and in the future. Members recognised that the council needed to create a working culture where people could reach their full potential so they could live their best working life.

RESOLVED:

1. That Cabinet endorses the direction of travel for the Surrey County Council People Strategy 2023-2028

Reasons for Decisions:

The council's workforce is crucial to delivering the Organisation Strategy for the benefit of Surrey residents and to ensure no one is left behind. Approximately 36% of the council's budget is spent on staffing so it is vital this money is spent wisely on a workforce that performs to its full potential and is inclusive of the communities the council represents. The People Strategy sets out the outcomes needed to deliver this and ensure that outstanding services can continue to be delivered to residents, particularly those who are most vulnerable, in the context of significant financial challenges. It is recommended that the Cabinet endorses the draft People Strategy, in the context of setting the 2023/24 budget and agreeing the Medium Term Financial Strategy. Further work will then be undertaken to finalise the People Strategy and develop a delivery plan setting out the specific actions needed to deliver the four people outcomes and how we will measure our progress.

(The decisions on this item can be called in by the Resources and Performance Select Committee)

14/23 THE SURREY SCHOOL ORGANISATION PLAN AND A LIFETIME OF LEARNING STRATEGY 2030 [Item 11]

The report was introduced by the Cabinet Member for Education and Learning who explained that Cabinet was being asked to consider and support the development of a Lifetime of Learning Strategy for Surrey aligned to the Community Vision for Surrey 2030 and endorse the draft joint ambitions for wider consultation with all education providers and key partners. Through the local education partnership and in conjunction with Schools Alliance for Excellence, work had commenced to articulate a set of joint ambitions for education and learning. These joint ambitions are key to ensure that the whole education community can align and prioritise activity to realise these ambitions and in particular move toward educational equity for all by levelling up.

The Cabinet Member explained that the Cabinet was also being asked to consider and endorse the School Organisation Plan which sets out the policies and principles underpinning both mainstream and specialist school organisation in Surrey. The plan highlights the likely demand for school places projected over a 10-year period and sets out any potential changes in school organisation that may be required in order to meet the council's statutory duty to provide sufficient places. Members welcomed the detail within the School Organisation Plan which would be of benefit to residents when planning for their children's future.

RESOLVED:

1. That Cabinet agrees the approach to secure the ambitions within the Community Vision for Surrey 2030 and the Surrey Skills Plan through collaborative work with stakeholders;
2. That Cabinet endorses the School Organisation Plan 2022-2032 which will meet our statutory duties to ensure that there are sufficient high-quality places for pupils in Surrey and refer it to Council for approval (**Annex A**);
3. That Cabinet agrees the principles to be adopted in the light of falling birth rates across Surrey and growing vacant school places (**Annex A**).

Reasons for Decisions:

In a changing education landscape, it is imperative to bring all education providers in Surrey together to secure a shared vision based on collaboration that meets the needs of all our learners.

The School Organisation Plan is a key document used by schools and education stakeholders in considering medium and long term plans. It is necessary to review the plan to ensure that the best and most up to date information is published for use in this process to encourage collaborative and collegiate planning.

(The decisions on this item can be called-in by the Children, Families, Lifelong Learning & Culture Select Committee)

15/23 SURREY INCLUSION AND ADDITIONAL NEEDS STRATEGY [Item 12]

The Cabinet Member for Education and Learning presented the Inclusion and Additional Needs Strategy to Cabinet which sets out the commitment of the Surrey Additional Needs and Disability Partnership to work together to enable all children with additional needs and disabilities in Surrey to thrive and achieve their full potential. It was explained that the strategy was an example of great partnership work and had taken on the views of children and their families. The strategy had been scrutinised by the Children, Families, Lifelong Learning & Culture Select Committee whose views had been considered and incorporated into the strategy. The Cabinet Member explained that the number of EHCPs had massively increased in the last five years and there had been very little financial support from the government. The council is committed to the principle of early identification and support for children and their families. The Cabinet Member explained that a small number of parents had staged a powerful protest outside the council offices. The Cabinet Member had listened to the stories of these parents and apologised for the delays and the stress and the strain that sometimes these parents and families are put through. The Leader stated that he also had an opportunity to speak to these parents and that it was important that the council listens to the lived experiences of residents.

RESOLVED:

1. That Cabinet endorses the Inclusion and Additional Needs Strategy 2023-26 and in doing so approves the following ambition statement for children with additional needs and disabilities:

“Our aspiration is to enable Surrey children and young people aged 0-25 with additional needs and / or disabilities to lead the best possible life. This strategy sets out our ambition that all Surrey children and young people with additional needs and/or disabilities and their families:

- *are heard and are involved in the decisions that affect them*
- *achieve positive outcomes, including the opportunity to lead healthy lives*
- *develop positive relationships*
- *learn and achieve their educational potential, and*
- *become increasingly independent where possible and flourish within their community.*

To achieve this, we will work in partnership with families and colleagues across education, health, social care and the third sector to:

- *improve experiences and outcomes for children, young people and their families and ensure that no-one is left behind*
- *be a champion for children and young people with additional needs and/or disabilities*
- *ensure children and young people are rooted in Surrey and educated locally, wherever possible*

- *learn from our feedback and continue our improvement journey”.*

Reasons for Decisions:

It is a requirement of the Children and Families Act 2014 and associated SEND Code of Practice to “ensure that all children and young people are able to access the right support and provision to meet their needs”.

The Inclusion and Additional Needs Strategy 2023-26 replaces the Surrey ‘SEND’ Partnership Strategy 2019-2022 and underpins the additional needs and disabilities transformation programme. The strategy sets out the commitment of the partnership to work together to enable all children with additional needs and disabilities in Surrey to thrive and achieve their full potential.

(The decisions on this item can be called-in by the Children, Families, Lifelong Learning & Culture Select Committee)

16/23 FOSTER CARE REMUNERATION [Item 13]

The Cabinet Member for Children and Families introduced the report explaining that Cabinet were being asked to approve an increase in payments to Surrey foster carers which would be in line with other local authorities and independent fostering agencies. It was added that if Cabinet agreed, foster carers remuneration package would be backdated to 1 January 2023. The increased payment was in recognition of the important work carried out by foster carers and was supported by the Surrey County Fostering Association Executive group.

RESOLVED:

1. That Cabinet considers the business case and approves the investment to improve remuneration to Surrey County Council Foster Carers.
2. That Cabinet approves the request to back-date the improved remuneration package to 1 January 2023.

Reasons for Decisions:

The proposed investment will bring the allowances and fees paid to Surrey County Council foster carers more in line with competitors; this is an essential component of addressing current and future issues of recruitment and retention of foster carers.

The Council needs to increase in-house fostering capacity and reduce the number of children who have to be placed with Independent Agency foster carers. Placement with independent carers, or in residential care is more expensive and more likely to be at greater distance from Surrey than in-house foster care.

(The decisions on this item can be called-in by the Children, Families, Lifelong Learning & Culture Select Committee)

17/23 ADMISSION ARRANGEMENTS FOR SURREY'S COMMUNITY AND VOLUNTARY CONTROLLED SCHOOLS FOR SEPTEMBER 2024 AND SURREY'S RELEVANT AREA [Item 14]

The Cabinet Member for Education and Learning explained that Surrey County Council was responsible for setting the admission arrangements for 85 community and voluntary controlled schools for 2024. The admission arrangements for each school determine which children will receive priority for a place. The Cabinet Member explained that the recommendations in the report which included changes to admission arrangements in some schools would come into force from September 2024.

RESOLVED:

That Cabinet RECOMMENDS that County Council agree:

1. That the catchment for Southfield Park Primary School is extended for 2024 admission to include the Parkview estate as a replacement for 'nearest school', as indicated in Enclosure 1 and Appendix 3 of Enclosure 1.
2. That the tiebreaker within catchment for Southfield Park Primary School is changed to straight line distance from the school for 2024 admission, as indicated in Enclosure 1.
3. That a catchment area is introduced for Stamford Green Primary School for 2024 admission to replace 'nearest school', as set out in Enclosure 1 and Appendix 4 of Enclosure 1.
4. That the Published Admission Number (PAN) for Reception at Beauclerc Infant School is reduced from 40 to 30 for 2024 admission, as set out in Appendix 1 of Enclosure 1.
5. That the Published Admission Number (PAN) for Reception at Farncombe Infant School is reduced from 50 to 30 for 2024 admission, as set out in Appendix 1 of Enclosure 1.
6. That the change to the Published Admission Number (PAN) and admission criteria for Year 3 at St Ann's Heath Junior School is not progressed, so that the admission arrangements for this school remain as determined for 2023, as set out in Enclosure 1 and Appendix 1 and 2 of Enclosure 1.
7. That the Published Admission Numbers (PANs) for September 2024 for all other community and voluntary controlled schools (except Beauclerc and Farncombe infant schools which are covered by Recommendations 4 and 5) are determined as they are set out in Appendix 1 of Enclosure 1.
8. That the aspects of Surrey's admission arrangements for community and voluntary controlled schools for September 2024 for which no change has been consulted on, are agreed as set out in Enclosure 1 and its appendices.
9. That Surrey's Relevant Area is agreed as set out in Enclosure 4.

Reasons for Decisions:

Recommendation 1

- The removal of 'nearest school' will bring the admission criteria into line with the remaining community and voluntary controlled schools
- It will ensure that the admission arrangements for this school comply with the School Admissions Code
- It will simplify the admission arrangements
- It will enable parents to better understand how their application will be considered
- It will ensure the Parkview estate is still served by the school, which is the area that 'nearest school' was originally introduced to serve
- There are no other changes to the catchment boundary
- It is expected to have minimal impact on the intake to the school
- Where children might be displaced, a place at an alternative local school will be available
- The final distance criterion will still exist which will enable remaining applicants to be prioritised based on the distance they live from the school, ensuring children who live closer to the school are allocated ahead of children who live further away
- It is supported by the Headteacher and Governing Body of the school

Recommendation 2

- Based on current application numbers and forecasts, all children living within catchment who want a place are expected to be offered and so this change should not alter the intake
- It will reduce likelihood of error by removing a process that needs to be carried out manually
- It will reduce the resource and expertise needed to maintain the waiting list for this school
- It is supported by the Headteacher and Governing Body of the school

Recommendation 3

- The removal of 'nearest school' will bring the admission criteria into line with the remaining community and voluntary controlled schools
- It will ensure that the admission arrangements for this school comply with the School Admissions Code
- It will simplify the admission arrangements
- It will enable parents to better understand how their application will be considered
- It will ensure most children who would ordinarily be offered the school are not displaced in favour of children who have another school that is nearer, especially those living on the Noble Park and Wells estates
- It is expected to have minimal impact on the intake to the school
- Where children might be displaced, a place at an alternative local school will be available
- The final distance criterion will still exist which will enable remaining applicants to be prioritised based on the distance they live from the school, ensuring children who live outside catchment but closer to the school are allocated ahead of children who live further away
- It is supported by the Headteacher and Governing Body of the school

Recommendation 4

- It is supported by the Headteacher and Governing Body of the school, having been requested by them
- It is supported by Surrey's Education Place Planning team
- There will still be sufficient places for local children if the PAN is decreased
- It will help the school maintain financial viability as they will be able to operate with just one class
- It will have no impact on children who are currently on roll at the school

Recommendation 5

- It is supported by the Headteacher and Governing Body of the school, having been requested by them
- It is supported by Surrey's Education Place Planning team
- There will still be sufficient places for local children if the PAN is decreased
- It will help the school maintain financial viability as they will be able to operate with just one class
- It will have no impact on children who are currently on roll at the school

Recommendation 6

- This change was subject to it being agreed for Meadowcroft Infant School to become an all through primary school by the end of December 2022. As this decision is not now expected to be made until February 2023, it is not yet possible to change the arrangements for St Ann's Heath Junior School
- If it is agreed to expand Meadowcroft Infant School into a primary school in February 2023, the local authority will consider submitting an in year variation to vary the admission arrangements for 2024 in line with the consultation

Recommendation 7

- Most other PANs remain as they were determined for 2023 which enables parents to have some historical benchmark by which to make informed decisions about their school preferences for 2024 admission
- The PAN for Ash Manor has been increased from 240 to 270 as part of a school expansion
- The Education Place Planning team supports the PANs

Recommendation 8

- The admission arrangements are working well
- The arrangements enable the majority of pupils to attend a local school and in doing so reduce travel and support Surrey's sustainability policies
- The changes highlighted in bold in Section 12, Section 15 and Section 21 of Enclosure 1 have been made to add clarity to the arrangements and reflect existing practice

Recommendation 9

- The local authority is required by law to define the Relevant Area for admissions

- The Relevant Area must be consulted upon and agreed every two years even if no changes are proposed
- Setting a Relevant Area ensures that any schools who might be affected by changes to the admission arrangements for other local schools will be made aware of those changes
- No change has been made to Surrey's Relevant Area since it was last determined in February 2021

(The decisions on this item can be called-in by the Children, Families, Lifelong Learning & Culture Select Committee)

The meeting adjourned at 15:58 and reconvened at 16:07.

18/23 GODSTONE AND MERROW HIGHWAYS DEPOTS - REPLACEMENT SALT BARNs [Item 15]

The report was introduced by the Cabinet Member for Property and Waste who explained that Cabinet approval was required for capital funding to design and build two new salt barns, one at Godstone Depot and one at Merrow Depot. The existing structures were both beyond economic repair and neither had sufficient capacity to provide the required volume of covered storage of salt. New salt barns would ensure that the Highways and Transport Service had fit for purpose, year-round facilities with long-term operational lifespans to deliver critical services. The Cabinet Member for Highways and Community Resilience commented that both depots would hold a total of 8000 tonnes of salt.

RESOLVED:

1. That Cabinet approves capital funding from the Highways Depot Strategy budget and pipeline (total £16.5m) for the development and construction of two new salt barns, one at Godstone and one at Merrow. The design and build costs are commercially sensitive at this time and are set out in the Part 2 report.
2. That Cabinet approves procurement of appropriate supply chain partners to deliver the design, build and fit out of the two new structures in accordance with the Council's Procurement and Contract Standing Orders.
3. That Cabinet notes that, regarding the procurement of supply chain partners, the Executive Director for Resources and the Director of Land and Property are authorised to award such contracts, up to +5% of the budgetary tolerance level.

Reasons for Decisions:

It is essential to provide salt barns at both Merrow and Godstone Depots in order to:

- Provide fit for purpose, long-term facilities for the Council's Highways department to provide its critical services, and statutory Health and Safety requirement of gritting highways in winter weather.

- The services provided by Highways are essential for enabling safer travel across the county for residents, businesses and visitors.
- Ensures the Service has the right facilities in the optimum locations to deliver its services, within agreed response times.

(The decisions on this item can be called in by the Resources and Performance Select Committee)

19/23 2022/23 MONTH 8 (NOVEMBER) FINANCIAL REPORT [Item 17]

The Cabinet Member for Finance and Resources introduced the report explaining that at Month 8 the Council was forecasting a full year deficit of £6.0m. The current level of projected Directorate overspend remained significant at a net £23m, after the implementation of in-year budget recovery plans. £17m of the corporate contingency budget was being utilised to reduce the overall level of forecast overspend to £6m. Directorates which were currently forecasting an overspend position had committed to delivering budget recovery plans, which required the identification of targeted additional in-year efficiencies to mitigate the forecast overspend. At the end of November 2022, £10.3m of mitigations had been identified, reducing the Directorate position to £23m (from £33.3m). With regards to Capital, the Month 8 position showed a forecast spend of £212.4m against a budget of £215.8m, a variance of £3.4m. At Month 9 (January 2023) the capital budget would be reset to adjust for in-year movements, at this point forecast overspend mitigations would also be reflected.

RESOLVED:

1. That Cabinet notes the Council's forecast revenue and capital budget positions for the year, including the use of the contingency budget and the commitment to develop Directorate budget recovery plans.

Reasons for Decisions:

This report is to comply with the agreed policy of providing a monthly budget monitoring report to Cabinet for approval of any necessary actions.

(The decisions on this item can be called in by the Resources and Performance Select Committee)

20/23 YOUR FUND SURREY APPLICATION -THE OXSHOTT COMMUNITY HUB [Item 16]

David Lewis left the meeting at 16:12.

The Deputy Leader and Cabinet Member for Communities and Community Safety introduced the application for the Oxshott Community Hub. The application was to rebuild the existing huts to create a new community hub for the whole community, providing a new purpose built building which would consist of two halls, a kitchen, storage area and meeting rooms. The building would be environmentally friendly with low energy lighting, insulation and double glazing and lower running costs. The current huts were built in 1968 and were not fit for purpose. The hub was located in an area of deprivation and would provide a suitable location for many groups supporting the vulnerable which were not currently operating in this area. The application

was supported by the Your Fund Surrey advisory panel. The Leader welcomed the application and recognised the benefits to the local community.

RESOLVED:

1. That Cabinet agrees to fund project CF147 for the full amount requested of £1,187,817 towards the creation of The Oxshott Community Hub.

Reasons for Decisions:

This application has been the subject of a rigorous assessment by officers who consider the project to meet the aims and published criteria of the fund and to satisfy the requirements to award funding.

The existing scout and guide hut is not fit for purpose and not utilised to its' full potential by the local community due to its' poor state. Rebuilding the building would create an environmentally friendly hub for use by the whole community, including the scouts and guides.

(The decisions on this item can be called-in by the Communities, Environment and Highways Select Committee)

David Lewis returned to the meeting at 16:17.

21/23 EXCLUSION OF THE PUBLIC [Item 18]

RESOLVED: That under Section 100(A) of the Local Government Act 1972, the public be excluded from the meeting during consideration of the following items of business on the grounds that they involve the likely disclosure of exempt information under the relevant paragraphs of Part 1 of Schedule 12A of the Act.

22/23 GODSTONE AND MERROW HIGHWAYS DEPOTS - REPLACEMENT SALT BARNs [Item 19]

The Cabinet Member for Property and Waste introduced the Part 2 report which contained information which was exempt from Access to Information requirements by virtue of Paragraph 3: information relating to the financial or business affairs of any particular person (including the authority holding that information).

RESOLVED:

See Exempt Minute [E-01-23]

Reasons for Decisions:

See Minute 231/23.

(The decisions on this item can be called-in by the Resources and Performance Select Committee)

23/23 FUTURE WASTE TREATMENT AND DISPOSAL SERVICES [Item 20]

The Cabinet Member for Property and Waste introduced the Part 2 report which contained information which was exempt from Access to Information requirements by virtue of Paragraph 3: information relating to the financial or business affairs of any particular person (including the authority holding that information) and Paragraph 5: information in respect of which a claim to legal professional privilege could be maintained in legal proceedings.

RESOLVED:

See Exempt Minute [E-02-23]

Reasons for Decisions:

See Exempt Minute [E-02-23]

(The decisions on this item can be called-in by the Communities, Environment and Highways Select Committee)

24/23 PUBLICITY FOR PART 2 ITEMS [Item 21]

It was agreed that non-exempt information may be made available to the press and public, where appropriate.

Meeting closed at 16:17

Chairman

REPORT OF THE COUNCIL'S SELECT COMMITTEES**SCRUTINY OF:**

- Surrey Strategy for Accommodation, Housing and Homes

Date Considered: 5 December 2022

Select Committee: Communities, Environment and Highways

Surrey Strategy for Accommodation, Housing and Homes

As part of its overview and scrutiny role, Community, Environment and Highways Select Committee received a report on Surrey Strategy for Accommodation, Housing and Homes.

The report was presented by Cabinet Member for Children and Families and Executive Director of Prosperity, Partnerships and Growth.

In considering the report, the Select Committee, inter alia, noted:

1. The Surrey-wide strategy was a response to several drivers and pressures identified by different agencies.
2. Social care perspectives were significant drivers in the development of this countywide strategy with the main reason for the strategy being with the economic, workforce, social care and public health aspects currently being experienced.
3. Possibility to consider opportunities where areas of land owned by multiple partners that did not fall in the district or borough remit. This type of element would benefit districts and boroughs housing waiting lists and housing plan targets without undermining their sovereignty with housing or the planning process.
4. The strategy had not yet been written and would include a response to the baseline assessment and feedback provided (including any

concerns by districts and boroughs) at a recent housing meeting which had included all the districts and boroughs – the statutory functions of the districts and boroughs would not be affected.

5. It was not intended to be a strategy for the Surrey County Council to deliver alone, rather a call to action on strategic countrywide issues that partners could decide to enact or not. The County Council would lead the call to action in its stewardship role to champion housing in Surrey within the context currently played by the districts and boroughs.

After detailed discussion and noting the responses to its key lines of enquiry, the Select Committee agreed the following recommendations for Cabinet to consider.

RESOLVED (Stephen Cooksey and John Furey abstained):

The Communities, Environment and Highways Select Committee:

1. Recognises that the County Council can make a positive contribution to the many and diverse challenges relating to housing and therefore supports the principle of establishing a comprehensive Surrey-wide housing strategy founded on mutual respect and common interests of all partners.
2. Is concerned that, while no individual prospective partner should wield a 'veto' in the process, the County's 11 District and Borough Council Leaders have expressed serious concerns and therefore welcomes the Cabinet Member's i) pledge to reflect on and take further into account the views of the District and Borough Council Leaders, as expressed by Councillor Cooksey, and ii) offer to continue to engage with those Councils.
3. Urges the early development of key performance indicators to determine whether the high ambitions and expectations arising from the Strategy as listed in paragraph 14 of the report are realistic.

4. Requests that recommendation bullet points 2 & 3 above are addressed before a final strategy to Cabinet is presented.

John O'Reilly

Chairman of the Community, Environment & Highways Select Committee

Surrey County Council

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CHILDREN, FAMILIES, LIFELONG LEARNING AND CULTURE SELECT COMMITTEE

Item Under Consideration: A Housing, Accommodation and Homes Strategy For Surrey

5

Date Considered: 02 March 2023

1. The high cost of housing and deficiency in key worker housing in Surrey is considered by managers working in Children and Families to be a significant impediment to stabilising their workforce. It was confirmed to the Select Committee at its 2 March 2023 meeting that the Council did not offer a comprehensive key worker housing scheme.
2. The Committee learned that more social workers had left than joined in the year to October 2022, when turnover was 27.8 per cent: some were moving to higher paid agency work. In the 2022 Inspection of Local Authority Children's Services, Ofsted highlighted the need to improve "the proportion of permanent staff, to reduce turnover". The CFL directorate is aiming to increase its proportion of permanent social workers to 85 per cent, from its current level of 67 per cent.
3. Committee Members spoke with Assistant Directors, Service Managers and Social Workers in a series of visits to quadrants between November 2022-February 2023. They were informed that a key point at which staff were lost was when newly qualified social workers move out of area on completing their first assisted year. They wanted to live independently but could not afford to do so in Surrey, where they face extreme housing costs. This was reported to have a significant impact on workforce. More than two in five (41.3 per cent) of social workers who left the Council in the year to January 2023 had been in the role less than two years. Some choose to commute from neighbouring counties, but the resulting high petrol costs make the Council's salary less attractive. If staff are to be enabled to stay, and agency workers persuaded to become permanent staff, key worker housing may be a powerful incentive.

Recommendation:

Key worker housing is included as a deliverable in the Cabinet report *A Housing, Accommodation and Homes Strategy for Surrey* for decision in March 2023. (Lead Member: Cabinet Member for Children and Families)

Liz Bowes, Chairman - Children, Families, Lifelong Learning Select Committee

Background papers

Pages 79-97 & 145, Children, Families and Lifelong Learning Select Committee, 2 March 2023

<https://mycouncil.surreycc.gov.uk/documents/g8913/Public%20reports%20pack%20Thursday%2002-Mar->

[2023%2010.00%20Children%20Families%20Lifelong%20Learning%20and%20Cultu
re%20.pdf?T=10](#)

REPORT OF THE COUNCIL'S SELECT COMMITTEES

SCRUTINY OF:

- **DELIVERING IN PARTNERSHIP: TOWNS – THE NEXT PHASE**

Date Considered: 8 February 2023

Select Committee: Communities, Environment and Highways

As part of regular scrutiny and monitoring process, Community, Environment and Highways Select Committee received a report on 'Delivering in Partnership: Towns – The Next Phase' to seek the Committee's views and contribution to the next phase of the work, including the suggested priority towns for the next phase, and the ongoing engagement with and role of Members in those towns.

The Select Committee, inter alia, noted:

- i. In order to extend the approach being taken using towns as the key building blocks and spatial level at which practical delivery in partnership with others can best be secured, an independent socio-economic analysis of our 27 strategic towns and 2 village areas, was commissioned. The towns and the relationships each has with District or Borough Councils, key neighbourhoods, Primary Care Networks and Place Alliances. A set of multi-dimensional, socio-economic and health criteria and data, along with local intelligence, have been used to identify the towns to be prioritised for 2023/24. This has included an assessment of the co-ordinated partnership activity already in place in localities (e.g. Cranleigh, Camberley); and
- ii. The intention, subject to the consultation responses and further engagement, is to phase the roll out of five towns every six months, over the coming two years, based on updated assessments of socio-economic and health factors. As a result, all towns will in due course be included, albeit that they may come forward later in the programme.

After detailed discussion and noting the responses to its key lines of enquiry, the Select Committee agreed the following recommendations for Cabinet to consider.

5

Resolved:

The Communities, Environment and Highways Select Committee:

- a. Endorses the principle of bringing together key agencies, particularly the National Health Service, Districts & Boroughs as well as others, at a towns spatial level on a prioritised basis, to work collaboratively on locally determined priorities, empowering local residents to contribute to their achievement;
- b. Seeks reassurance around the monitoring of inputs, outputs and outcomes using key criteria and measures of success with regular reporting to the relevant Cabinet Member/Cabinet, in order that the effectiveness of the towns approach can be evaluated;
- c. Encourages the active consideration of how rural areas are to be effectively incorporated into the future programme, recognising the particular needs and issues faced in those communities;
- d. Requests that the rationale for the prioritisation of towns should be shared with Members; and
- e. Asks the Cabinet Member and the relevant Executive Directors to provide a progress report to this Select Committee on the progress being made, by December 2023, including an update on recommendations a. to d. above.

John O'Reilly

**Chairman of the Community, Environment & Highways Select Committee
Surrey County Council**

SURREY COUNTY COUNCIL**CABINET****DATE:** 28 MARCH 2023**REPORT OF:** N/A**LEAD OFFICER:** JOANNA KILLIAN, CHIEF EXECUTIVE**SUBJECT:** LEADER/DEPUTY LEADER/CABINET MEMBER/ STRATEGIC INVESTMENT BOARD AND COMMITTEE-IN-COMMON DECISIONS TAKEN SINCE THE LAST CABINET MEETING**SUMMARY OF ISSUE:**

To note the delegated decisions taken since the last meeting of the Cabinet.

RECOMMENDATIONS:

It is recommended that the Cabinet note the decisions taken by Cabinet Members since the last meeting as set out in Annex 1.

REASON FOR RECOMMENDATIONS:

To inform the Cabinet of decisions taken by Cabinet Members, Strategic Investment Board and the Committee in Common subcommittee under delegated authority.

DETAILS:

1. The Leader has delegated responsibility for certain executive functions to the Deputy Leader and individual Cabinet Members and reserved some functions to himself. These are set out in Table 2 in the Council's Scheme of Delegation.
2. The Leader has also delegated authority to the Strategic Investment Board to approve property investment acquisitions, property investment management expenditure, property investment disposals and the provision of finance to its wholly owned property company, Halsey Garton Property Ltd.
3. Delegated decisions are scheduled to be taken on a monthly basis and will be reported to the next available Cabinet meeting for information.
4. **Annex 1** lists the details of decisions taken since the last Cabinet meeting.

Contact Officer:

Huma Younis, Committee Manager, huma.younis@surreycc.gov.uk

Annexes:

Annex 1 – Delegated Decisions taken

Sources/background papers:

None

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CABINET MEMBER FOR COMMUNITIES AND COMMUNITY SAFETY DECISIONS
(31 January 2023)

**1. YOUR FUND SURREY APPLICATION - FRIENDS OF KENYNGTON MANOR
PARK UPGRADE**

Resolved:

The approval of funding from Your Fund Surrey for project CF172 Friends of Kenyngton Manor Park Upgrade for the full amount requested of £190,176.

Reason for decision

This application has been the subject of a rigorous assessment process by officers, as set out in the body of this report. Officers consider the project to meet the aims and published criteria of the fund and to satisfy the requirements to award funding.

CABINET MEMBER FOR EDUCATION AND LEARNING DECISIONS
(31 January 2023)

1. SEND Capital Programme Phase 4: (Proposal to create a specialist school satellite site for Philip Southcote School at Epsom & Ewell High School, and Proposal to change the designation of and expand the SEN Unit at Ashford Park Primary School)

RESOLVED:

Proposal 1: the Cabinet Member approved the proposal without modification

Proposal 2: the Cabinet Member approved the proposal without modification

The Cabinet Member for Education and Learning determined the statutory notices published for each of the two proposals thereby bringing into effect the formal commencement of the proposals.

Reasons for decision

The two proposals referenced in this paper are part of a suite of proposals to provide up to 6,000 state-maintained specialist school places for pupils in Surrey by 2030/31, delivered under Phase 4 of the Capital Programme.

The Cabinet Member for Education and Learning's approvals and recommendations completes the statutory process in accordance with the DfE guidance "Making significant changes ('Prescribed Alterations') to Maintained Schools."

STRATEGIC INVESTMENT BOARD
(13 February 2023)

RESOLVED:

1. That the Strategic Investment Board endorse the 2022/23 Mid-Year Report of the Strategic Investment Board (Annexes A and B) and agree that the reports be presented to Cabinet on 28 March 2023.

Reasons for Decisions:

To inform the Council about the activities of the Strategic Investment Board.

The Strategic Investment Board has been established in accordance with best practice governance to ensure effective oversight and alignment with the strategic objectives and values of the Council.

CABINET MEMBER FOR COMMUNITIES AND COMMUNITY SAFETY DECISIONS
(28 February 2023)

Surrey Fire and Rescue Service - Adoption of the Charter for Families Bereaved through Public Tragedy

RESOLVED:

The Cabinet Member approved the adoption of The Charter for Families Bereaved through Public Tragedy.

Reasons for decision

Signing up to the Charter for Families Bereaved through Public Tragedy will provide additional assurance to our communities should an event happen within Surrey.

Transformation Assurance Board

As part of my commitment to continue to embedding change in Children's Social Care, I have taken on the chairmanship of the Children's Social Care (CSC) Transformation & Assurance Board. This is in its fourth month of operation and developing into its role of overseeing the work of children's social care, in particular the impact of transformation and performance and driving forward improvements. The Board is supported by some external independent members, who are bringing their expertise to bear on this important work and ensuring external scrutiny. It also has cross-party member representation to provide additional strength and knowledge to the Board. A key focus has been on the family safeguarding service.

The **'Family Safeguarding Model** – Phase 2' project held a 'relaunch' workshop in December 2022 and received a diagnostic review report from our Hertfordshire County Council partners in practice. Senior leaders in CSC are currently reflecting on the findings ahead of publication. There has also been a number of workforce related workshops this month to support the Family Safeguarding Service's application of thresholds in social care practice.

I am pleased to highlight that the Family Safeguarding service has been successful in securing funding from the Department for Education that enables them to work in partnership with the Centre for Family Safeguarding from November 2022 to March 2023. The support focuses on strengthening the way the Family Safeguarding model is used as a way of working and the importance of working closely with safeguarding partners across the County such as Schools, Health Authorities, Voluntary Organisations, Probation Service and Police to address needs related with domestic abuse, substance misuse, and mental ill health. Partnership working in this way helps provide personalised access to support from specialist recovery workers who work alongside families to create conditions for improved wellbeing, happiness, and safety within their family units, which in turn helps us all to deliver on our ambitions to significantly improve outcomes for children and their families.

Early Help: The early help offer in Surrey is complex and dependent on the contributions of all agencies, partners, and communities. When this is working well families can access a localised early help offer, whether they are signposted and self-serve or are supported by practitioners through schools and early years settings, Police, GPs, and other health services to get the help they need. For families whose needs are multiple and more complex, practitioners or families themselves can request support through the Children's Single Point of Access (C-SPA). The aim of the partnership continues to be to identify and support families at the earliest opportunity, embed the Family Resilience and Safeguarding model across the whole system in Surrey and stem the escalating demand for children's social care.

A deep dive into Early Help was presented to the Transformation & Assurance Board in December 2022, as part of the intention to maximise the new outcome framework for Supporting Families. Its focus is on building the resilience of vulnerable families, and on driving system change so that every area has joined up, efficient local services which are able to identify families in need and provide the right support at the right time. The Board endorsed the next steps for the Early Help Improvement journey outlined below:

- Establish an early help partnership board, with the first meeting taking place in January 2023.
- A review with partners of the safeguarding partnership threshold document, focussing on changing language and ensuring the services are meeting need, not fitting into services. It is also hoped to use this opportunity to incorporate other thresholds such as IThrive.
- Refreshing our Helping Families Early strategy in line with the refresh of thresholds.
- Aligning with other council activity of community engagement
- Enhancing our adolescent offer to ensure we are offering the correct support to adolescent
- Exploring future delivery methods and funding streams for supporting families/ Early Help

As part of the Early Help Continuous Improvement Programme, the service has been learning about the experiences of children, young people and families that access Early Help services as well as learning from partners that deliver these services. A research partner was commissioned to carry out engagement work with 105 Practitioners, 5 Children aged 1-10yrs, 34 Young people aged 11-18yrs, 23 Parents and 3 Mentors. The research partner recruited and trained community researchers who conducted 59 interviews and 62 people were consulted. The ten themes that came out of the findings have been used as a basis to inform the service co-design events which took place at the end of January/beginning of February. The learning from families and partners in conjunction with the Early Help Needs Assessment

that has been developed, will be used to shape our Early Help provision and the recommissioning of our Early Help services that will go live in April 2024 and be considered at a future Cabinet meeting.

We have recently welcomed inspectors from Ofsted, the Care Quality Commission (CQC) and His Majesty's Inspectorate of Constabulary and Fire & Rescue Services (HMICFRS) for a multi-agency Joint Targeted Area Inspection (JTAI) into Surrey's Early Help arrangements for children and families. This entailed two weeks of arms-length evaluation of the Surrey partnership's early help arrangements and a week of fieldwork which was completed in early March, and I look forward to receiving the final report which is expected to be published in early May. I'd like to thank both our staff and those of our partners for their hard work in meeting and providing information to the inspectors.

7

Customer Services: In Autumn 2022, an internal audit was undertaken to review the process of complaints management in the Children, Families & Lifelong Learning (CFL) directorate. The Customer Relations service provide a vital engagement service for Surrey residents, and the feedback received, in many cases, is used to develop practice and help us to understand the impact of our work with children and families. There were some outcomes for consideration, which reflected the experience of the Customer Relations team who have noted significant increases in the volume of enquiries and complaints over the past two years, in-line with increases in requests for services. The report findings and the actions proposed by the service in response are currently being reviewed by CFL senior leaders and will be a feature of a future CSC Transformation and Assurance Board deep-dive.

Building Belonging Programme: The Building Belonging Programme will provide a multi-agency (social care, health, education, police and voluntary sector) approach to preventing children and young people with complex needs entering the criminal justice system. The partnership has been successful in a bid for funding from NHS England to implement a pilot in one district in Surrey. The programme is part of a National Vanguard, Health & Justice, and part of the NHSE 10-year Integrated Framework and will be evaluated to identify local and national learning to service delivery.

A decision-making process involving data analysis and consultation resulted in the programme being focused in Elmbridge. Elmbridge has little by way of multi-agency partnerships and interventions for this cohort of children; Family Support are working with families with teenagers with mental health issues which in some cases is leading to anti-social behaviour and risk of exploitation. There is a cyclical nature to families with generational issues and young people following other family members into the justice system. Elmbridge has areas of deprivation and inequality, exacerbated by neighbouring affluence, but children from all demographics are at risk of exploitation which the programme will explore.

The Programme is currently being mobilised with a view to going live at the end of March. It will take a life course approach, providing both preventative and intensive support to children and families from early years through to transition to adulthood.

Recruitment and Retention: The recruitment and retention of our Children's Social Workers has been an ongoing challenge for the Council, further complicated by the pandemic and the increase in the cost of living. The demand for services has continued to rise, adding pressures to a workforce delivering services against a backdrop of high vacancies (c31% vacancy rate - December 2022). This is by no means unique to Surrey and the Local Government Association, which represents councils across England, published their 2022 Workforce Survey on 20 January, highlighting the scale of the issue - [2022 Local Government Workforce Survey | Local Government Association](#). It said 'significant staff shortages in local government risk having a serious impact on councils' capacity to deliver services'. The Survey finds that: *More than 8 in 10 councils are having difficulties recruiting children's social workers and almost three quarters (72 per cent) are having problems retaining them – councils are increasingly having to turn to agency staff to plug gaps which is more costly and leave less for children's services overall.*

Children's Services has been trying to tackle recruitment and retention issues through a targeted approach by setting up a Recruitment, Retention and Culture Workforce programme that has a specific focus on Social Workers (SW). Amongst several interventions, this has led to running targeted recruitment campaigns; webinars that are aimed at agency SWs (temp to perm campaign); career pathways that support internal growth; internal transfers that enable retention and development; a diverse external pipeline of social workers from frontline to universities and a continued programme of learning and development from the Children's Academy. To [page 32](#) develop the pipeline of skills we are looking to

grow our own through our Apprenticeship scheme and explore other approaches such as a non-SW qualified staff progression and supporting SW qualified staff in other roles back to the profession.

Looked after Children

It is our aim, where appropriate, to have as many as possible of our Looked after Children cared for and supported in Surrey close to their support networks and communities and as part of this sufficiency strategy, we have embarked on an ambitious construction programme. On site construction and internal works continues at the new Epsom and Walton children's homes, with completion expected in March and Interviews for the Registered Managers for these homes have taken place. The application for planning determination for a Dorking children's home will be heard at the March Planning Committee and a team have started the detailed design work and issued a project programme. Major work to redevelop the Shaw family centre in Woking to a fit-for-purpose family contact centre continues with expected completion by June 23. In addition, Cabinet has also approved the allocation of a further £18 million to create an additional 24 beds in Surrey Children's homes in coming years, on top of the projects I have mentioned already - starting with a further home in the Woking area.

Foster carer remuneration: Recruiting and retaining our in-house foster carers is also key to our sufficiency strategy of providing Surrey homes for Surrey children and nationally the number of people registered as foster carers has seen a decrease in recent years. Currently 51% of children in foster care, excluding those living with Council foster carers from their own kinship network, are placed with Independent Fostering Agency carers which can cost £20,000 more per child per year on average than an in-house foster home. Of those, 89% live outside of Surrey. Whilst people decide to foster for a number of reasons, of which remuneration is only part of the picture, it was recognised that the Council's remuneration is not wholly competitive with other local authorities or Independent Fostering Agencies. The proposal to restructure and increase remuneration to foster carers was approved by Cabinet on 31 January 2023. Investment totalling £2.7m was approved to bring fostering allowances and skills payments more in line with competitors and to reward and incentivise areas of fostering that are more complex or difficult to recruit to.

I hope that by increasing the number of placements in our own homes and by supporting the recruitment and retention of our brilliant foster carers that it will be possible both to reduce the cost of care and provide high quality placements in Surrey to avoid children losing contact with their local communities.

In December I was pleased to be able to attend a brilliant Christmas celebration organised by the User Voice and Participation team for looked after children and care leavers at Surrey's headquarters in Woodhatch, Reigate. During the event, there was a DJ, a live performance by Fiaa, a craft area where children and young people could decorate baubles, a buffet, popcorn machine, face painting and Santa was handing out gifts from his grotto with his elves and Mrs Claus. The evening was full of laughter, smiles, and amazing dance moves!

We want to create more opportunities for care leavers and be an outstanding 'corporate parents' to all of Surrey's care leavers. As part of this we are in the process of joining the Care Leaver Covenant which is an initiative aimed at improving outcomes for care leavers across the country.

Congratulations and support for our Staff

Our dedicated staff are key to our support for vulnerable children and they often work in challenging conditions. To highlight their contributions, in December the communications team launched an internal Yammer campaign called 'Celebrating CFLL' to promote the successes of staff within the CFLL directorate during 2022. The campaign recognised that roles in CFLL are often tough and put a spotlight on the work the directorate does to support children and families in Surrey. Staff from across CFLL, including each member of the CFLL Leadership Team, posted achievements which supported the directorate's purpose: to ensure that every child is seen and heard, feels safe and can grow. The posts were seen by Yammer users 2,642 times in total and had over 180 interactions. The 'Children, Families and Lifelong Learning Hub' community on Yammer tripled its membership during the campaign, with 764 active participants in the first month of launch.

The communications team also hosted the first Surrey-wide recognition awards in December, 'Stars in Surrey' to celebrate the efforts and successes of teams across Surrey County Council as well as our partners and heroes in our communities. CFLL staff were shortlisted in eight of the ten award categories and took home four awards in recognition of the fantastic individuals in the directorate and the importance of their work.

Our staff can use one day per year to volunteer as a team to help community organisations as well as providing an opportunity for team building. Recently the Policy, Planning & Projects Team in CFLL organised a Volunteering Day, supporting Linkable an invaluable disability charity based in Woking. The team worked hard to give the internal rooms a make-over and tidy up the garden. This was organised through Surrey's Social Value Marketplace [Surrey County Council \(supplytosurrey.co.uk\)](http://supplytosurrey.co.uk) and meant that staff could give back to a charity that supports both children and adults to learn independent skills. The Linkable team were very grateful for the help which meant that their staff could focus on the most important aspect of their work, supporting those they work with and their families.

Housing Strategy

7 Work has continued on engaging stakeholders and developing the draft strategy, that has been based on the baseline assessment and Housing Summit on 8th December. The strategy makes a number of 'Calls to Government' and 'Calls to Action' for all in Surrey with a role to play in improving housing, homes and accommodation. District and Borough Housing Officers, Planning Officers and Chief Executives have been given an opportunity to contribute to and refine the draft strategy, which is on the agenda for consideration at today's meeting.

SURREY COUNTY COUNCIL**CABINET****DATE: 28 MARCH 2023**

REPORT OF CABINET MEMBER: DENISE TURNER-STEWART, DEPUTY LEADER AND CABINET MEMBER FOR COMMUNITIES AND COMMUNITY SAFETY

LEAD OFFICERS: MICHAEL COUGHLIN, EXECUTIVE DIRECTOR FOR PARTNERSHIPS, PROSPERITY AND GROWTH

SUBJECT: DELIVERING IN PARTNERSHIP: TOWNS - THE NEXT PHASE

ORGANISATION STRATEGY PRIORITY AREA: REDUCING HEALTH INEQUALITIES, A GREENER FUTURE, THRIVING COMMUNITIES, GROWING A SUSTAINABLE ECONOMY SO EVERYONE CAN BENEFIT AND NO-ONE LEFT BEHIND

Purpose of the Report:

To:

- i) set out the background to and rationale for using a towns footprint as the optimum approach to addressing priorities in individual localities, including reducing health inequalities, improving equality of opportunity and access to services, the difference in life expectancy, and effective community engagement and empowerment, all of which are known key issues and require a multi-agency, system approach,
- ii) seek Cabinet support and endorsement for the proposed extension of the programme of delivering in partnership in towns, including the proposed priority towns for the next phase of the work.

Recommendations:

It is recommended that Cabinet:

1. Support and endorse the strategic approach of delivering in partnership in towns, to address key priorities for residents, communities, partners, and the County Council,
2. Approve the prioritised towns, identified through assessment against key socio-economic and health criteria, as set out at paragraph 20.

Reason for Recommendations:

As set out in the report, a number of communities and places in Surrey experience significant challenges with e.g. health inequalities, worklessness, skills, aging populations, child poverty, homelessness and housing, despite the general perception of the county as comfortable and prosperous. Partners across the county have set out high ambitions, supported by strategic plans, to address these. Experience has shown that the complex nature of many of the 'wicked issues' requires a multi-agency, highly collaborative approach. The approach being recommended, which reflects the learning from work to date, will drive

practical delivery, beyond strategic intent, through convening, galvanising and empowering partners to work together to deliver, at an optimum spatial level (e.g. towns), supported, guided and overseen by elected representatives.

INTRODUCTION

Surrey's context

1. Surrey has a range of unique features, strengths and qualities as well as serious challenges which can be masked by the comparative attractiveness, and prosperity of the county. Some of these challenges include:
 - **Demography** – Surrey has a growing and aging population - 1.19 million residents is expected to grow to 1.21 million by 2030. By 2030 the proportion of working age residents (16-64) and of younger people is expected to decrease with a 29% increase the number of over 85 year olds, meaning more people living with ill health and conditions such as dementia, social isolation, and loneliness, as well as impacting the local labour market.
 - **Health and wellbeing** - Life expectancy varies considerably across the county. Between wards there is a 10-year gap in life expectancy for males (76-86), and a 14-year gap for females (80-94). Average ratings of well-being have deteriorated across all indicators in the year ending March 2021, most profoundly observed with mental health. Ethnic minority groups and LGBTQIA+ people typically have poorer health outcomes and experiences of healthcare.
 - **Economy** – Surrey's strong economy has more recently grown at a slower rate than other parts of the country. While attractive to business, the rate of business births and growth are falling in comparison to regional and national levels. The 'middle workforce' (aged 25-44), a key driver of economic growth, is expected to decline by 8% by 2030.
 - **Cost of living** – While there are generally low levels of deprivation in Surrey, in some areas over 20% of children are impacted by poverty. Of the 4,197 clients seen by Surrey Citizens Advice between April – September 2022, 1,184 were new to their services. Support was given on approximately 7,000 issues, in particular around benefits, debt, housing and foodbanks. Some foodbanks across Surrey stating they have seen a 300% increase of demand on their services between 2020 and 2022.
 - **Environment** – Surrey's road network carries double the national average traffic flow (4th highest in the country) and is the slowest county to drive around. While CO2 emissions have fallen (by 22% from 2026 to 2020), they need to fall by 46% against 2019 levels by 2025 to be meet targets. Surrey has the 4th highest level of transport-related emissions of all counties in England in 2020.
 - **Communities** – While one of the safest places in England and Wales, (6th lowest recorded crime rate of the 43 police forces), reported knife crime among young people has increased in the previous two years by 50%. Domestic violence has increased by 16.7% between May 2020 and May 2019.
 - **Housing** - In 2021 there were 14,134 households on the Surrey Housing Register. Surrey is second only to Greater London for house prices and has become more unaffordable more quickly, with the ratio of earnings to house prices rising by 50% since 2011. Homelessness and under-occupation are worsening.

- **Education and Skills** – Surrey has generally high-performing schools and training providers. However, feedback from businesses is that the skills system is not flexible enough to respond to their needs and that businesses face significant recruitment challenges. The higher concentration of high-skilled occupations exacerbates the skills gaps for intermediate and lower-skilled occupations, particularly in terms of personal care, nursing, restaurant operations and warehousing.

(A fuller description of Surrey’s context is set out at Appendix A, including a link to the Joint Strategic Needs Assessment)

Background and Vision

2. Following engagement with a wide range of residents, businesses, universities, and organisations from the public, voluntary, community and faith sectors across the county, the Community Vision for Surrey set out that by 2030:

“Surrey would be a uniquely special place where everyone has a great start to life, people live healthy and fulfilling lives, are enabled to achieve their full potential and contribute to their community, and no one is left behind. The county’s economy would be strong, vibrant and successful and Surrey would be a great place to live, work and learn - a place that capitalises on its location and natural assets, and where communities feel supported and people are able to support each other”.

3. The ambitions for people are:
 - Children and young people are safe and feel safe and confident
 - Everyone benefits from education, skills and employment opportunities that help them succeed in life
 - Everyone lives healthy, active and fulfilling lives, and makes good choices about their wellbeing
 - Everyone gets the health and social care support and information they need at the right time and place
 - Communities are welcoming and supportive, especially of those most in need, and people feel able to contribute to community life.
4. The ambitions for place are:
 - Residents live in clean, safe and green communities, where people and organisations embrace their environmental responsibilities
 - Journeys across the county are easier, more predictable, and safer
 - Everyone has a place they can call home, with appropriate housing for all
 - Businesses in Surrey thrive
 - Well connected communities, with effective infrastructure, that grow sustainably

STRATEGIC INTENT

5. In the context of the Vision 2030, partners across the county have established priorities and developed strategies and programmes of work and services that contribute to these ambitions (See Appendix B for links to a number of strategies), including:
 - The Surrey Health and Wellbeing Board’s focus on three interconnected priorities, drawn from an analysis of the Joint Strategic Needs Assessment:

Supporting people to lead healthy lives by preventing physical ill health and promoting physical well-being - ensuring people are eating healthily and are active, addressing individual lifestyle factors including addiction, ensuring access to diagnostics and immunisations to prevent disease and support is available to live well independently for as long as possible.

Supporting people's mental health and emotional well-being by preventing mental ill health and promoting emotional well-being -preventing poor mental health and supporting those with mental health needs so people have access to early, appropriate support to prevent further escalation of need, and creating communities and social environments that tackle isolation and build good mental health.

Supporting people to reach their potential by addressing the wider determinants of health - helping residents develop the skills needed to succeed in life and flourish in a safe community, including participation in their own communities and the impact of the built/natural environment on health.

- The Frimley Health and Care system and Surrey Heartlands Health and Care Partnership (formally known as an 'Integrated Care Systems' - or ICS for short) of organisations, including the NHS, local government, social care providers, hospices, social enterprise partners, Healthwatch Surrey and the wider voluntary, community, faith sector and charities, focus on the wider determinants of poor health – e.g. pollution, poverty, poor housing, and lack of access to education. The four overarching aims of bringing partners together in this way are to:
 - Improve outcomes in population health and healthcare
 - Tackle inequalities in outcomes, experience, and access
 - Enhance productivity and value for money
 - Help the NHS support broader social and economic development)

The Surrey Heartlands ICS strategy sets out three ambitions in pursuit of the above:

Prevention – drawing on the Health and Wellbeing Strategy three priorities focused on supporting people to lead physically healthy lives, have good mental health and emotional wellbeing, and creating the context in which those individuals and communities can reach their potential

Delivering care differently – creating a model of care which is responsive to residents' needs and puts them at the centre of decision, with two main aims for the transformation of how we deliver care: i) Making it easier for people to access the care that they need when they need it; ii) Creating the space and time for our workforce to provide the continuity of care that is so important to our populations. The implementation of the Fuller Stocktake report (See Appendix B for a link to "Next steps for integrating primary care") and the subsequent development of place and Neighbourhood teams will drive how care is delivered across Surrey Heartlands.

The functions needed to support delivery of the ambitions - this includes new ways of working with, and empowering communities, new approaches to workforce development and employment practices, improved use of data to drive decisions and service provision, new approaches to assets and estates, with multi-purpose, community-oriented facilities.

The County Council, in addressing the Community Vision 2030 has set out a guiding mission ('no one left behind') and four key areas of focus:

- **Growing a sustainable economy so everyone can benefit** - creating the conditions for sustainable economic growth within Surrey, to maintain the county's position as the strongest economy outside of London and ensure all residents can benefit as a result, while tackling economic inequality across the county to make sure economic growth is inclusive.
- **Tackling health inequality** - helping residents to stay healthy and well is key to improving residents' quality of life and tackling inequality of life expectancy.
- **Enabling a greener future** - ensuring that Surrey remains an attractive place full of opportunities, offering clean, safe and green communities, tackling the causes of climate change and accelerate reductions in carbon emissions.
- **Empowered & thriving communities** - characterised by more people participating, engaging and having a role and say in how things are done on matters that impact them and where they live.

6. An analysis of Surrey's 11 District and Borough Councils' strategic plans shows a high degree of commonality and alignment with the above priorities. In addition, District and Borough Councils make significant contributions to the quality of life and health and well-being of Surrey residents through statutory functions such as Planning, Housing and Environmental Services, as well as Leisure, Open Spaces and countryside management.
7. Many other organisations, bodies and agencies play key roles in the achievement of the Community Vision 2030 – e.g. Surrey Police, both strategically and at a local level through Borough Commanders; businesses, independently and in associations, guilds, chambers and forums; and local communities themselves formalised in residents' associations or more loosely coming together in the interests of their people and places.

PRACTICAL DELIVERY

8. As partners have worked on the practical delivery of the 2030 Vision and strategic priorities, a particular focus has been given to prevention and early intervention and working more locally together, and with communities. New health policies, structures, and ways of working are being implemented that have a stronger relationship with partners at a local level, with a high priority being afforded to the wider determinants of health, the services and resources that impact them, and the role of Local Government.
9. During the Covid-19 pandemic, and since then, the critical role played by Charitable, Voluntary and Faith organisations was apparent in contributing to the health and quality of life of Surrey residents. There is an opportunity to build on this, which will be more readily facilitated by working in localities with a high degree of connectivity with local communities, better enabling many of the 6,000 plus charitable bodies and faith groups across the county to engage in supporting shared priority ambitions.
10. The work of the Council's Community Link Officers (CLOs) who are engaging, working alongside and supporting local communities, has clear links with any work being done across towns. Whilst each CLO is attached to a District and Borough area, they are actively focused in key smaller spatial areas to enable meaningful engagement and local activity, working closely with County Council Members and District and Borough Ward Councillors. The work of the CLOs and wider asset-based community

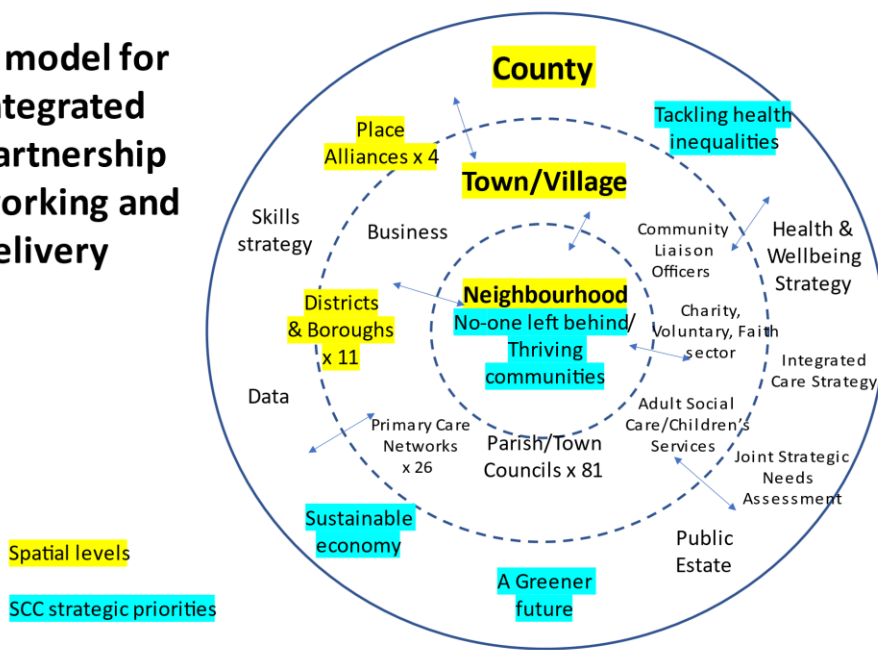
development approach of the Communities team with partners, contributes to and can draw from (and will not be subsumed by) the partnership delivery activity, structures and member engagement associated with towns-based work.

11. Alongside this, an improved local partnership approach to asset rationalisation and optimisation, e.g. co-location, development, that draws interested parties together to better co-ordinate and align their ambitions and plans for their assets, is emerging.
12. There is an opportunity to improve the local co-ordination and delivery of public realm/'place-making' enhancements and the regeneration of the built and natural environments and communities within the County Council and between partners, including enhancing partnership work around stimulating local economic activity, especially in High Streets/Town Centres.
13. Through experience, engagement and analysis, towns have been identified as the optimum spatial level at which to do this. By working more effectively together in defined localities, health, councils, police, community, voluntary and charitable and business partners can work with residents to identify what matters to them in their local area and work to deliver on it, e.g. reducing health inequalities, protecting the environment, growing the economy, and supporting the local community.

TOWNS – THE NEXT PHASE

14. The diagram below sets out a model of defined spatial areas and some of the activity that occurs within them, that are increasingly being used and referred to as the building blocks for partnership work and delivery:
 - County-wide (x 1)
 - Health 'Place Alliances' (x 4)
 - District and Borough Councils (x11)
 - Towns/Primary Care Networks (x 26-29) – not coterminous, though broadly similar in size
 - Local Super Output Areas (x 709), 21 of which have been identified by the Health and Wellbeing Board, through an analysis of the Indices of Multiple Deprivation, as being most disadvantaged for targeted action.

A model for integrated partnership working and delivery



(It is important to note that below the county level, the spatial areas are different ways of subdividing the county and not distinct and separate from each other).

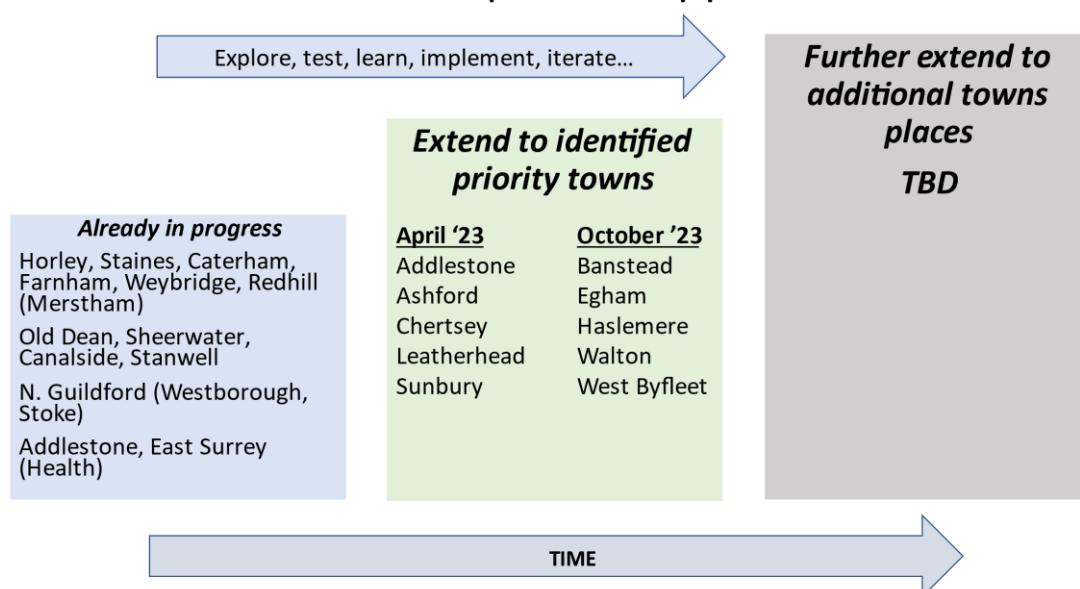
15. Good local working relationships and partnership work has already been developed and is underway in a number of towns (See Appendix C for a summary of current activities, projects and outcomes in Caterham, Farnham, Weybridge, Staines and Horley).
16. This work and the programmes, developments and projects arising from it, are founded on the following key characteristics and benefits:
 - Improved sharing of data, evidence and perspectives
 - Ensuring partner engagement with local people, in places they recognise and associate with, is happening, co-ordinated and used to drive delivery
 - Convening, co-ordinating and aligning people, finance and assets
 - Co-designing and implementing new multi-agency service models
 - Shared oversight and assurance of delivery and remedial action
 - Delivering identified partnership projects.
17. All of which is aimed at securing more effective and efficient delivery and better outcomes for Surrey residents and businesses. Some of these outcomes and the measures used to assess them might include:
 - Improved overall life expectancy and reductions in differentials
 - Levels of employment and ability of employers to recruit
 - Qualitative happiness scores
 - Reductions in smoking/alcohol/drug usage and dependency
 - Improved quality of public realm
 - Positive impacts on climate change and CO2 emissions reduction
 - Community activity, social capital and civic engagement

The next phase of the towns programme

18. In order to extend the approach being taken using towns as the key building blocks and spatial level at which practical delivery in partnership with others can best be secured, an independent socio-economic analysis of our 27 strategic towns and 2 village areas, was commissioned. Appendix D shows the towns and the relationships each has with District or Borough Councils, key neighbourhoods, Primary Care Networks and Place Alliances.
19. A set of multi-dimensional, socio-economic and health criteria and data, along with local intelligence, have been used to identify the towns to be prioritised for 2023/24. This has included an assessment of the co-ordinated partnership activity already in place in localities (e.g. Cranleigh, Camberley).
20. A wide range of County Council services as well as health partners, through the Surrey Heartlands Neighbourhood Board, have been engaged with and consulted and have provided helpful feedback.

8

Towns- a phased approach



21. The intention, subject to the consultation responses and further engagement, is to phase the roll out of 5 towns every six months, over the coming two years, based on updated assessments of socio-economic and health factors. As a result, all towns will in due course be included, albeit that they may come forward later in the programme.

Practical experience of delivering as part of a towns approach

22. As different towns have different histories, locations, communities, assets, issues and priorities, the following is a generalised picture, drawn from real-world examples, of how work in a 'town' can typically develop:
 - A lead individual or individuals identifies and convenes partners, including health agencies, Members/Councillors and public representatives, to review and discuss the current situation 'on-the ground': e.g. key stakeholders, local issues, partnership activity, historic and existing community consultation, engagement and

development, state of assets/public realm, etc. to identify priorities, ideal outcomes and performance measures.

- This is captured in a shared narrative and statement of the community's aims and ambitions for the town (possibly a 'Vision') and the agreed approach to be taken to working in partnership.
- A group (or 'crew') comprising representatives from local agencies, organisations, bodies and communities is formed, who lead and guide the co-ordination and practical delivery of work, including aligning existing funding, business case development, identifying funding sources and as necessary, funding applications
- District or Borough Ward Members, County Council Divisional Members (and where applicable Town or Parish Councillors) play a critically important role. (For instance, in Tandridge, District Council Ward Councillors and County Council Divisional Members have met periodically, under the chairmanship of the Leader of Tandridge District Council, with the local MP and District and County Council officers (the 'crew') to provide local knowledge, a deeper understanding of the local community, it's people, assets, history and local priorities, to steer the progress of the work and monitor progress and any necessary remedial action, holding the crew and other partners to account for delivery).
- The above work is carried out alongside public engagement and community development activity and has regard to other service developments, programmes, projects and 'business as usual' in the area
- Light-touch oversight and the sharing of experiences and lessons learnt are undertaken through partner agencies' own arrangements.

23. Experience to date of working in the above way, albeit not without its challenges, when committed to by partners, has demonstrated how centring activity, resource and partners around a defined town makes the delivery of the vision more effective, more manageable and more tailored to the actual (as distinct from perceived or assumed) issues and needs of that community and locality. It enables a deeper and shared understanding of those communities and finding a way of cutting through established organisational structures and relationships that can sometimes operate in 'silos', by bringing people together to create a local eco system that really delivers.

Implementation

24. In order to ensure the optimum arrangements and effectiveness of the approach and practical work, a light-touch oversight function will be established to support connectivity, communication, learning and reporting between and from the towns to ensure effective links into other, county-wide partnership work/bodies.
25. A commission for tightly defined expert external support to help the development of an effective, empowering, co-ordinated, multi-disciplinary delivery approach in each of the prioritised towns, is being developed, which will include engagement with and support for the lead agencies, services, and individuals in each town.
26. The critical role played by the relevant County Council Divisional Members and District and Borough Councillors in each priority town will continue to be reflected in local arrangements for engagement, consultation and guidance (see Appendix E showing SCC Divisional Members, with a provisional 'allocation' to individual towns).

Conclusions

27. Given Surrey's largely dispersed and discrete settlements ('polycentricity'), towns offer an optimum spatial level at which to galvanise partners and communities to work together to bring about improvements, change and empowerment.
28. A measured approach to the expansion of the current work and relationships will allow exploration, testing, learning and a more dynamic implementation over time.
29. Critical to the success of the programme, the work in individual towns and delivery of outcomes, will be the engagement, contribution and commitment of local elected representatives.

Consultation:

30. The approach set out in this report has been presented to the Surrey Heartlands Neighbourhood Board, the Integrated Care System Executive Board, the Integrated Care Partnership Board, the Communities, Environment and Highways Select Committee and an all-Member development session.

Risk Management and Implications:

31. The risks associated with this strategic approach lie in the longer-term programmes and projects, mainly in terms of the outcomes sought not being delivered. There is an attendant risk that partners' time, effort and resources committed to the work do not secure value for money. The careful design of the approach and work in individual towns, and collaborative, iterative and flexible nature of the programme, along with identified key measures of success for each town and proportionate monitoring and oversight of the work are intended to minimise the implications and impacts of any such risks.
32. Work in the five pilot towns to date has identified a number of practical risks associated with the implementation of the work, as follows:
 - Insufficient wider support amongst partners for engagement and local activity
 - Constrained resources amongst partners leading to slower or non-delivery of aspirational elements of some programmes
 - Differences of perspectives, approaches and assessment of priorities
33. The careful development of a 'crew' approach and time spent building understanding around a thorough research/evidence base, upon which positive relationships can be built at a local level and sustained through sound governance, while not negating completely the above risks, has proved to be helpful in mitigating them.

Financial and Value for Money Implications:

34. Much of the cost associated with the proposed roll-out of the Towns approach will be met from existing budgets and/or by re-directing resources and staff. Further work is being undertaken on the extent of any additional costs, which it is intended will be shared between partners in each identified town and where appropriate and necessary, drawn from budgets established to drive transformational change. Such an approach would typically be supported by the preparation of a business case(s) reviewed and as appropriate approved by budget holder(s) within the relevant

organisation. In the event that additional costs cannot be met from existing or transformation budgets, usual budget planning processes would be followed.

Section 151 Officer Commentary:

35. Although significant progress has been made to improve the council's financial position, the financial environment remains challenging. The UK is experiencing the highest levels of inflation for decades, putting significant pressure on the cost of delivering our services. Coupled with continued increasing demand and fixed Government funding this requires an increased focus on financial management to ensure we can continue to deliver services within available funding. In addition to these immediate challenges, the medium term financial outlook beyond 2022/23 remains uncertain. With no clarity on central government funding in the medium term, our working assumption is that financial resources will continue to be constrained, as they have been for the majority of the past decade. This places an onus on the council to continue to consider issues of financial sustainability as a priority in order to ensure stable provision of services in the medium term.
36. There are no direct financial impacts in agreeing the recommendation. There will need to be further work to establish the financial implications as a result of implementing plans to achieve the programme and these will need to be factored into the Medium-Term Financial Strategy as part of future budget planning processes. As such, the Section 151 Officer supports the recommendations.

Legal Implications – Monitoring Officer:

37. There are no direct legal implications in agreeing the strategic approach set out in the report. Any actions by the Council further to the towns next phase will be supported through the usual decision making and support process.

Equalities and Diversity:

38. The implications and impact on residents and staff with different protected characteristics are likely to vary on a town-by-town basis. Equality Impact Assessments (EIA) or equivalents will form part of the foundational work of each 'crew' in each town.

What Happens Next:

39. Lead agencies and individuals will be engaged with and supported in convening partners in each of the priority towns, to begin to put in place the activities set out at paragraph 22 above, while reflecting local communities', circumstances, conditions, and priorities.

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Appendices:

- Appendix A: Summary Surrey Context
- Appendix B: Key strategies (links and/or embedded)

- Appendix C: Five pilot towns' activities and outcomes
- Appendix D: Surrey's 27 towns and 2 village catchments
- Appendix E: SCC Divisions by town

Sources/background papers:

- Community Vision for Surrey 2030
- Joint Strategic Needs Assessment
- Surrey Health and Wellbeing Strategy
- Surrey Heartlands ICS Strategy
- Surrey Economic strategy statement
- Surrey Skills Plan
- Surrey County Council Organisation Strategy 2023-2028
- Metro-Dynamics report on Surrey Towns

OUR COUNTY - STRATEGIC CONTEXT

As a place, Surrey has a range of unique features and qualities that can create different challenges and opportunities. The statistics and observable trends below set the strategic context that the council must navigate.

Population	Economy
<p>Surrey has a population of 1.2 million residents, made up of approximately 481,800 households. This is expected to grow to 1.21 million by 2030</p> <p>Surrey is more urban than England as a whole but some areas of the county have large numbers of residents living rurally</p> <p>Ageing population - by 2030 the proportion of working age residents (16-64) and of younger people is expected to decrease while there are expected to be more residents aged over 65, and a 29% increase the number of over 85s</p>	<p>Surrey has a strong economy worth £43.5 billion with a high (and increasing) proportion of large business, contrary to a national decline.</p> <p>A low unemployment rate averaging about 2.1% in 2022, compared to 2.9% in the South East, and 3.6% nationally.</p> <p>Residents in Surrey have average [full-time] earnings of £38,418pa (£42,770 for men and £34,066 for women), over £7,000 above national average of £31,383pa (£33,770 for men and £28,996 for women).</p> <p>Surrey has a high proportion of 'micro-businesses' at around 91.4%, compared to the national average of 89.5%.</p> <p>Surrey is attractive to business with a 25% higher business density than the national average, but the rate of business births and growth in active businesses are falling in comparison to regional and national levels.</p> <p>The middle workforce (aged 25-44), who make up a large proportion of the skilled workforce and are a key driver of economic growth is expected to "decline by 8% by 2030", with signs of this decline already starting to show an impact.</p> <p>Despite this, Surrey still seeing a much higher rate of its residents employed as managers, directors, senior officials or professional occupations (63.8% compared to 51.4% nationally).</p>
Health and wellbeing	Cost-of-Living
<p>Surrey residents have longer life expectancies than people across most of England (approximately 2 years higher than the national average).</p> <p>Life expectancy varies considerably across the county. Between wards there is a 10-year gap in life expectancy for males (76-86), and a 14-year gap for females (80-94). Health and Wellbeing Board Dashboard Tableau Public.</p> <p>Nationally, and in Surrey, average ratings of well-being have deteriorated across all indicators in the year ending March 2021, continuing a trend that was seen across most indicators in the previous period, but even more sharply and which notably takes place during the COVID-19 pandemic. This is most profoundly observed with mental health across the population.</p> <p>Across Surrey in 2019, 5.36% of all-cause mortality was attributable to particulate air pollution. There is strong evidence that air pollution causes the development of coronary heart disease, stroke, respiratory disease, and lung cancer, exacerbates asthma and has a contributory role in mortality.</p>	<p>As cost of living began to rise, a survey conducted in the summer of 2022 found that around 66% of residents already reduced their energy usage to reduce cost and 63% of respondents said that the additional cost of fuel had negatively impacted their household finances.</p> <p>Of the 4,197 clients seen by Surrey Citizens Advice between April – September 2022, 1,184 were new to their services. Support was given on approximately 7,000 issues, in particular around benefits, debt, housing and foodbanks.</p> <p>This increased demand appears to be coming from particular groups within the county, with 66% of benefits claimants supported by Citizens Advice identifying as having a disability or long-term health condition, and two-thirds of clients identifying as female.</p> <p>Demand for food support is also increasing, with some foodbanks across Surrey stating they have seen a 300% increase of demand on their services between 2020 and 2022.</p>

<p>Ethnic minority groups typically have poorer health outcomes. GRT communities have the poorest health outcomes of any ethnic groups, not only in the UK but internationally.</p> <p>Evidence also suggests that LGBTQIA+ people have disproportionately worse health outcomes and experiences of healthcare.</p>	
<p style="text-align: center;">Education and skills</p> <p>According to the 2021 Census, nearly 286,000 children and young people live in Surrey. More than half of pupils achieve a strong pass (9-5) grade in English and Maths, compared to 43.4% nationally and 46.5% in the South East</p> <p>The county has a highly qualified workforce with over 50% of the working age population holding a degree-level qualification, with over 22% of residents employed in professional, technical and scientific businesses.</p> <p>There is a growing demand for services for children and young people with special educational needs and disabilities</p> <p>There are generally low levels of deprivation in Surrey, but in some areas over 20% of children are impacted by poverty. Pupils experiencing deprivation and those with additional needs are far less likely to do as well at school as their peers</p>	<p style="text-align: center;">Communities</p> <p>About 70% of residents believe there is a strong sense of community in their local area. This is reflected in the county's vibrant voluntary, community and faith sector, with approximately 6,000 organisations and thousands of residents volunteering each year</p> <p>Over 93.5% of people in Surrey recorded that they were satisfied with their neighbourhood as a place to live</p> <p>Surrey is one of the safest places in England and Wales, with the 6th lowest recorded crime rate of the 43 police forces, and lower than average rates of victim based crime</p> <p>Reported knife crime among young people has increased in the previous two years by 50%</p> <p>Domestic violence has increased during the Covid-19 pandemic with incidents being 16.7% higher in May 2020 than the same period the previous year</p>
<p style="text-align: center;">Housing</p> <p>There is very strong demand for all types of housing, homes and accommodation in Surrey however the strongest demand is for affordable and social housing. In 2021 there were 14,134 households on the Surrey Housing Register, but only 4,711 social or affordable rent homes were built between 2011 and 2021.</p> <p>Average house prices in Surrey were £639,000 in 2022, placing it second only to Greater London for house prices.</p> <p>Surrey is not only more unaffordable for private ownership than England or the wider South East, it's also become more unaffordable more quickly, with the ratio rising 50% since 2011, compared to 40% across the wider South East.</p> <p>There is also a rising problem with homelessness, which local authorities have been facing for some time. Across Surrey, in 2021/2022, 1,912 households were owed a prevention duty (assessed as threatened with homelessness), and 1,366 households were owed a relief duty (assessed as homeless).</p>	<p style="text-align: center;">Environment and Infrastructure</p> <p>Surrey has one of the busiest road networks in the country, which carry double the national average traffic flow (4th highest in the country) and make it the slowest county to drive around.</p> <p>More than 40% of residents work outside the county with nearly a quarter working in London. Prior to the COVID-19 pandemic additional capacity was needed on the train network to address overcrowding on commuter services</p> <p>Recycling rates in Surrey are better than the national average with 54.15% of household waste in Surrey being recycled, reused or composted in 2021 to 2022.</p> <p>CO2 emissions have fallen 22% from 2016 to 2020, and whilst the rate of this drop has been increasing year-on-year, there are concerns we still won't meet the council's zero emissions target by 2050 for the county and need to fall by 46% against 2019 levels by 2025 to be on track for the target</p> <p>Road transport is the main cause of air pollution in Surrey, and transport emissions remain high with Surrey having the 4th highest level of transport-related emissions of all counties in England in 2020.</p> <p>Residents have good access to woodland spaces with an estimated 24% woodland cover.</p>

Extract from Surrey Heartlands Integrated Care Strategy

Surrey is already one of the healthiest places to live in England. Our services also perform well with most health and care providers rated good or outstanding. Yet there are big

differences between what most of us experience and what some of us can expect, for example, with a 12-year gap in female life expectancy from birth depending on where you live. Because most people in Surrey are living longer, that means more people living with ill health and conditions such as dementia, social isolation, and loneliness. Although Surrey has good outcomes generally, there were existing health inequalities that were exacerbated due to COVID-19.

We know that clinical care alone only makes about 20% contribution to health and wellbeing, with a 30% contribution from individual health behaviours; the rest (the wider determinants of health, excluding genetic and hereditary factors) is influenced by factors such as education, housing, employment, the environment. Recognising the interdependencies between the wider determinants of health, and the biochemical, psychological and social aspects of a person is fundamental to enabling people to remain healthy and well and how we – as a system – should engage with them.

As a partnership, we want to create a health and care system that builds on the amazing community spirit we've witnessed during the pandemic. One that builds trust and relationships with communities, and supports people to take more control in their lives and in their communities, with easy access to high-quality care when it's needed.

With a focus on prevention and support that is targeted where it's most needed, we will reduce the unfairness some people experience in accessing care, so nobody is left behind. We will work as a system to harness innovation within business, ensuring that residents can access locally produced support, health and care which is joined up and digitally advanced. We are focussed on improving outcomes for the people of Surrey, reducing health inequalities, and providing the best care at the right time to enable people to live healthy and fulfilling lives.

Population Insights

We have used a number of methods to ensure the views of the population of Surrey are embedded throughout this document. The Joint Strategic Needs Assessment forms the bedrock of these insights as it provides an in-depth assessment of the current and future needs of our local communities. This, in turn, informs the Health and Wellbeing Strategy which has identified the priority populations and set the priorities and outcomes for people in Surrey.

We have backed up the insights obtained from these documents by engaging with Healthwatch, our local providers and other Voluntary Sector organisations to understand what our populations are telling them directly. Alongside these conversations, we have engaged with our populations directly through “on the street” engagement events and Place-specific engagement activities during the development of their local delivery plans. The voice of our population has been clear and strong; and this document reflects this.

Our population

The JSNA is an assessment of the current and future health and social care needs of the local community that may be met by the local authorities, district and borough councils or NHS.

As far as age-make-up is concerned, the largest five-year cohorts in Surrey are those between 45 and 49, and those between 50 and 54. The population of Surrey is roughly similar to England's, with a slightly higher proportion of 5 to 19-year-olds and a much smaller proportion of 20 to 34-year-olds. As a result, Surrey's working-age population is getting older, which affects both the workforce and the health care needs of the population.

Life expectancy and healthy life expectancy are useful indicators of population health and health inequalities. Surrey residents have longer life expectancies than people in the South East as a whole and this is longer than the life expectancies of people across most of England. However inequalities in life expectancy exist between the most and least deprived areas in Surrey. Spelthorne has the lowest life expectancy (80.7 years) for males, while Elmbridge has the highest (82.5 years). Life expectancy for women is also lowest in Spelthorne (84.2 years), it is highest in both Epsom & Ewell, and in Mole Valley. (85.8 years). In Surrey, circulatory diseases, cancer, and COVID-19 account for the largest gap in life expectancy between the most and least deprived quintiles.

There are also inequalities in how long a resident in Surrey can expect to spend their life in good general health. Healthy life expectancy in Surrey was 67.8 years and 69.7 years for males and females respectively. This is higher than both the South East and England. However, the inequality in healthy life expectancy varies with deprivation by 8.3 years in males and 8.4 years for females (OHID public health profiles).

Physical environment and socio-economic factors also have a significant impact on health and wellbeing and therefore are important to consider when assessing the health needs of our population. A natural environment can positively affect mental health, physical fitness, cognitive ability, and immune function, as well as lower mortality rates. The majority (90%) of private addresses in Surrey have private outdoor space, which is similar to the national average. In terms of public space, the average distance to the nearest park, public garden or playing field in Surrey is 370m, slightly below the national average of 379m. This is a positive opportunity for Surrey, and we should consider how we can leverage this access to green space to maximise the positive impact it has on residents' health.

There is clear evidence that good work improves health and wellbeing across people's lives. In Surrey 73.6% of the population are economically active (people aged 16 and over who are either in employment or unemployed) and 2.8% of those who are economically active are unemployed. Just over a quarter (26.4%) of the population are economically inactive (people not in employment who have not been seeking work within the last 4 weeks and/or are unable to start work within the next 2 weeks), of which 2% are long term sick or disabled and 12.9% are retired.

Link to Joint Strategic Needs Assessment

[Joint Strategic Needs Assessment | Surrey-i \(surreyi.gov.uk\)](https://www.surreyi.gov.uk/joint-strategic-needs-assessment)

LINKS TO KEY STRATEGIES

- Surrey Health and WellBeing Strategy
[Surrey Health and Well-being Strategy - update 2022 - Healthy Surrey](#)

- Surrey Heartlands ICS Strategy



Integrated Care
Strategy FINAL v3.doc

- Frimley Health and Care Strategy
[Designing our Planning Approach for 2019-20 \(frimleyhealthandcare.org.uk\)](#)
- Fuller Stocktake report
[next-steps-for-integrating-primary-care-fuller-stocktake-report.pdf](#)
- Surrey County Council Organisation Strategy 2023-2028
[Refreshed Organisation Strategy - DRAFT v3 for Cabinet.docx \(sharepoint.com\)](#)
- Surrey's Economic Future: Economic Strategy statement
[Surrey Economic Strategy Statement \(surreycc.gov.uk\)](#)
- Surrey Climate Change (Greener Future) strategy
[Surrey's Climate Change Strategy 2020 - Surrey County Council \(surreycc.gov.uk\)](#)
- Surrey Skills Plan
[Surrey-Skills-Plan.pdf \(investinsurrey.co.uk\)](#)

- Surrey Housing, Accommodation and Homes Baseline Assessment



220914 Surrey
Housing, Homes & Ac

- Metro-Dynamics: Analysis of 27 Surrey Towns



Surrey - Towns
analysis - FINAL (2).pc

Towns: Key activities and outcomes

In Farnham - Delivered an A road de-classification and HGV Ban, with town centre way-finding and town centre and surrounding roads 20 MPH limit, in progress. Consultation exercise on town centre traffic management changes, improvements to public realm and associated traffic calming now complete. Review of consultation feedback now underway before commencing next phase of the project. In Development: 2 Active travel schemes (Borelli's Walk and Scholars Greenway), LCWIP programme, A31 Corridor MRN scheme, Water Lane Roundabout improvements.

In Horley – an extensive, multi-partner co-ordinated local engagement programme on the future of the town centre (a multi-agency stall in Christmas market, face-to-face public workshops with residents, online surveys, printed surveys, face-to-face conversations with key stakeholders – retailers, local associations, largest employers, cultural institutions – face-to-face assemblies with 1200 secondary school students, open workshops with YMCA focus groups for young people and with autism groups through County Care), leading to publication of the community-led strategic vision for the town, and a list of priority projects identified by local residents and stakeholders. Since the publication of the collective vision, work continues to progress through a multi-partner local leadership group, some of the highlights so far include:

- The Horley Town Centre public realm works are now moving into detailed design stage prior to delivery on the ground next financial year.
- Progress on design of subway refurbishment subway drainage works
- Property ownership audit of town centre units to help enable local stakeholders' initiatives in vacant units
- Ongoing collaboration with Oakwood school to secure young people involvement in the regeneration of the town centre
- Progress on wellbeing initiatives led locally by health partners, establishing community garden and social prescribing
- Development of designs for further enhancements to green spaces and local parks
- Ongoing exploratory conversations for future skills provision
- Discussions with Network Rail have been ongoing, and agreement is being reached to ensure the flooding issues in the subway are addressed. A further phase of work to enhance the perceived safety and environment of the subway is being developed.

This activity, and other support for community led projects and engagement, is being supported by the Community Link Officer for the area working alongside all partners, including through the Growing Health Together initiative with health. One of an initial set of four Local Area Coordinator roles is also established in Horley, providing additional one-to-one support for residents who are struggling.

In Caterham – TDC, SCC Members and officers have come together to agree interventions and investment in identified projects/work packages based on priorities set by local residents. TDC bid to the government's Levelling Up fund, supported by SCC, focused on town centre improvements to Caterham Valley and Caterham on the Hill, including public realm improvements, integrated flood alleviation measures including signage and wayfinding to cultural and amenity spaces and a shop front grant scheme. (The bid was unsuccessful, and work is now underway to consider alternative funding and/or modifications). Improvements to Croydon Road public realm. Agreement across SCC and TDC to review assets in Caterham on the Hill and modernise community infrastructure to meet the needs of the local area. SCC in partnerships with TDC and the BID are working to deliver public realm improvements on Croydon Road which incorporates further flood reduction measures including rain gardens, EV charging, cycle parking, tree planting and seating. The scheme is due to commence summer 2023 and should be completed next financial year.

In Staines – A town partnership with local stakeholders is evolving, with an asset-based multi-disciplinary focus on cultural provision, infrastructure, and wider determinants of health.

Work is progressing with partners to consider the future location of Staines Library, aiming to deliver a modern and flexible space and multiuse building that aligns with the Library and Cultural Service transformation programme and the cabinet paper and associated funding approved in November 2021

to deliver modernisation of the library estate. Future developments on this element of the Staines partnership will be brought to cabinet at a later date. On the health agenda, partnership work is progressing through the Spelthorne Healthy Communities Partnership Board. This multi-partner group meets quarterly to continue with collaborative working on tackling both health inequalities and the wider determinants of health. Several projects are under consideration to improve infrastructure in the town centre. Community engagement took place in Autumn 22 on the Iron Bridge Improvement Project, to seek input to developing artwork designs (depicting local history and community assets) for spaces underneath the bridge and to widen the footway under the bridge to improve pedestrian safety and create a more pleasant environment encouraging more active travel. The works have now started on site and will be completed by the end of March 2023, creating an attractive gateway into Staines town centre.

In Weybridge - CIL Funding Application successful and secured and detailed design now progressing for a variety of highways, junctions and public realm improvements, including decluttering, active travel, speed reduction, improved crossing, new bus shelter, footway widening and improved crossings. Public and partner engagement is continuing to explore opportunities to deliver a package of localised interventions at the earliest opportunity in advance of the main works commencing next financial year. Joint vision, ambitions and plans developed with local residents and partners for the re-provision of the health centre, refurbishment of the library plus public realm improvements. All projects progressing to be delivered over the next couple of years. Health centre and library to work together as part of a 'campus' approach. This will bring together a range of health and wider community services to the town as well as creating community spaces for local residents and groups to access and utilise. Further public engagement event to be delivered late January 2023.

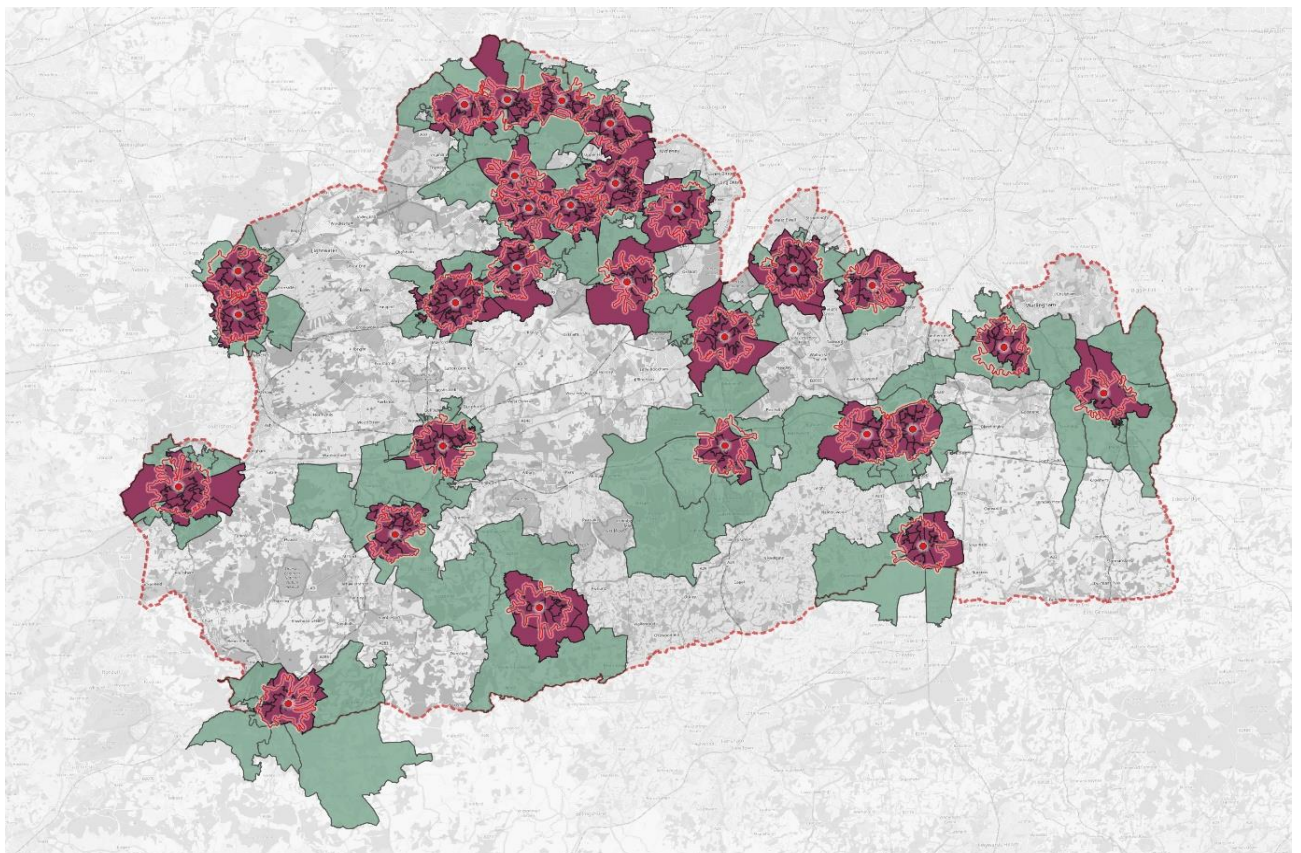
SURREY'S TOWNS

Appendix D

D&B	Town	Pop'n	HWB Areas of IMD		Place Alliance	Surrey Heartlands PCN	
1 GBC	Guildford	81,100	Westborough	Stoke	Ash Wharf*	Guildford & Waverley	GRIPC/ East Guildford
2 WBC	Woking	75,200	Canalside	Goldsworth Park		North West	WISE1/2/3
3 E&EBC	Epsom	35,500	Court	Tattenham Corner		Surrey Downs	Epsom/ ICP
4 SHBC	Camberley/Frimley	25,050	Old Dean			Surrey Health*	
5 RBBC	Redhill	33,125	Merstham, Hooley	Redhill West		East Surrey	Redhill Phoenix/Care Collaborative
6 SBC	Sunbury-on-Thames	30,375				North West	SASSE1
7 EBC	Walton-on-Thames	25,850	Walton South			North West	WPC/WHAM
8 SBC	Ashford	24,800	Ashford North			North West	SASSE2/3
9 RBC	Egham	24,250	Englefield Gr*			North West	SASSE2
10 RBBC	Horley	23,375	Horley Central			East Surrey	Healthy Horley
11 RBBC	Reigate	22,575				East Surrey	Redhill Phoenix/Care Collaborative
12 TDC	Caterham	21,775				East Surrey	North Tandridge
13 WaBC	Farnham	20,500	Upper Hale			NE Hants/Farnham*	
14 WaBC	Godalming	20,225	Godalming Central			Guildford & Waverley	East Waverley/ West of Waverley
15 SBC	West Byfleet	19,325				North West	WBC
16 RBC	Addlestone	18,675				North West	Coco
17 EBC	Weybridge	17,500				North West	WHAM
18 SBC	Staines	16,125	Stanwell N	St'well N 001B	St'well N 001C	North West	SASSE2/3
19 RBBC	Banstead	15,200				Surrey Downs	Banstead
20 RBC	Chertsey	14,975	Chertsey St Anne's			North West	Coco
21 MVDC	Leatherhead	13,975				Surrey Downs	Leatherhead
22 MVDC	Dorking	13,425	Holmwoods			Surrey Downs	Dorking
23 WaBC	Cranleigh & villages	11,675				Guildford & Waverley	East Waverley
24 EBC	Esher	11,525				Surrey Downs	East Elmbridge
25 EBC	Cobham	10,625				Surrey Downs	Leatherhead
26 WaBC	Haslemere	10,025				Guildford & Waverley	South Tandridge
27 TDC	Oxted	9,600				East Surrey	South Tandridge
28 TDC	Lingfield & villages	??				East Surrey	West Waverley
29 MVDC	Newdigate & villages	??				Surrey Downs	Dorking

* - Frimley ICS

(Town populations above are calculated based on the number of residents living within a 25-minute walking distance from a central point in the town's retail centre)

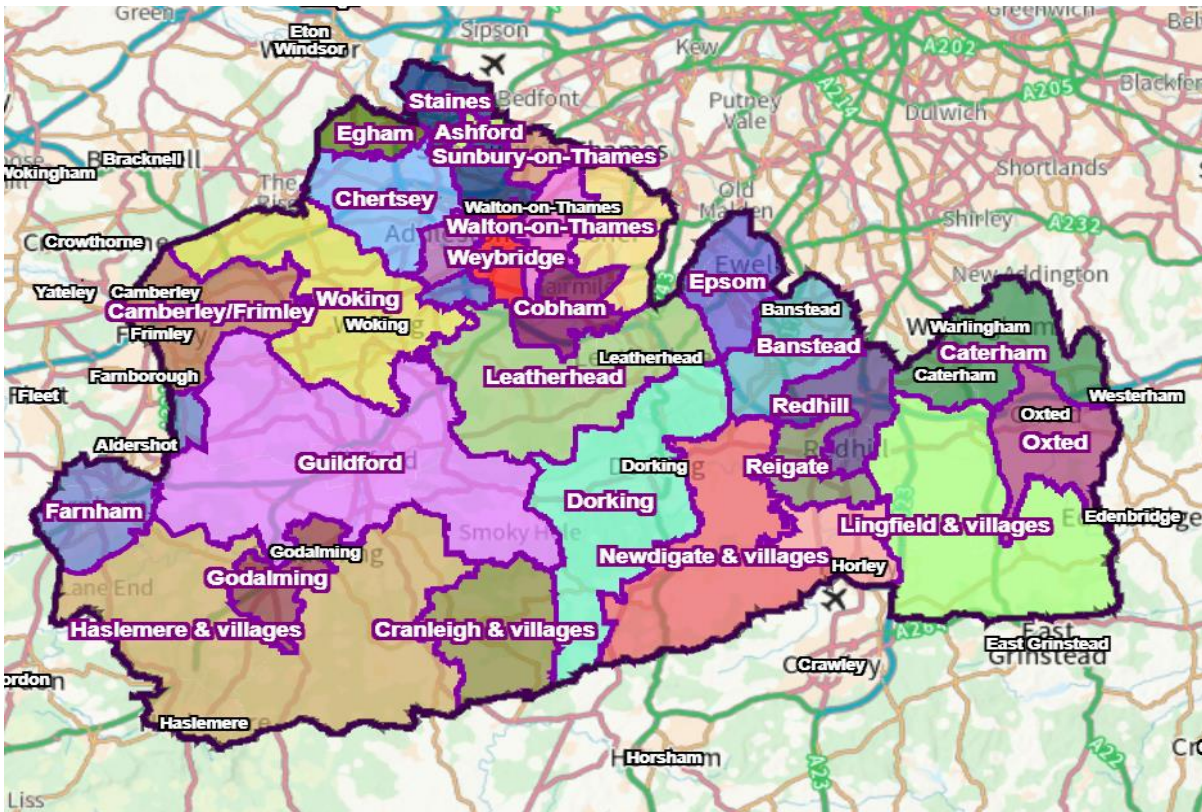


Town central points, 25-minute walking distances and associated Local Super Output Areas

Appendix E

DBA	Town	Divisional Members							
1 GBC	Guildford	North: Julia McShane	East: George Potter	South East: Fiona Davidson	South West: Angela Goodwin	West: Fiona White	Worplesdon: Keith Witham	Shere: Robert Hughes	Shaftord: Matt Furniss
2 WBC	Woking	North: Riasat Khan	South East: Liz Bowes	South: Will Forster	South West: Ayesha Azad	Knaphill & Goldworth West: Saj Hussain	Goldsworth E & Horsell: Lance Spencer	Bagshot, etc.: Richard Tear	
3 E&EBC	Epsom	West: Bernie Muir	Town & Downs: Steven McCormick	Ewell: John Beckett	Ewell Court, etc.: Eber Kington	West Ewell: Jan Mason			
4 SHBC	Camberley/Frimley	Camberley East: Trevor Hogg	Camberley West: David Lewis	Heathside & Parkside: Edward Hawkins	Frimley Green & Mytchett: Paul Deach	Lightwater, etc.: Rebecca Jennings-Evans			
5 RBBC	Redhill	East: Jonathan Essex	West & Meadvale: Natalie Bramhall						
6 SBC	Sunbury-on-Thames	Sunbury Common & Ashford Common	Lower Sunbury & Hallford: Buddh Weerasinghee						
7 EBC	Walton-on-Thames	Walton: Rachael I. Lake	Walton South & Oatlands: Tony Samuels	Herfams: John O'Reilly					
8 SBC	Ashford	Ashford: Joanne Sexton	Staines S. & Ashford W.: Denise Turner Stewart						
9 RBC	Egham	Egham: Robert King	Englefield Green: Marisa Heath						
10 RBBC	Horley	East: Jordan Beech	Horley West, Salfords & Sidlow: Andy Lynch						
11 RBBC	Reigate	Reigate: Viktor Lewanski	Earlswood & Reigate South: Catherine Baart						
12 TDC	Caterham	Caterham Valley: Jeffrey Gray	Caterham Hill: Jeremy Webster	Warringham: Becky Rush					
13 WABC	Farnham	North: Catherine Powell	Central: Andy McCloud	South: Michaela Martin	Ash: Carla Marson				
14 WABC	Godalming	North: Penny Rivers	Godalming South, Milford & Witley: Paul Follows						
15 SBC	West Byfleet	The Byfleet: Amanda Boote							
16 RBC	Addlestone	Addlestone: John Furey	Woodham & New Haw: Scott Lewis						
17 EBC	Weybridge	Weybridge: Tim Oliver							
18 SBC	Staines	Staines: Sinead Mooney	Stanwell & Stanwell Moor: Robert Evans	Laleham & Shepperton: Maureen Attewell					
19 RBC	Banstead	Banstead, etc.: Luke Bennett	Tadworth, Walton & Kingswood: Rebecca Paul	Nork & Tattenhams: Nick Harrison					
20 RBC	Chertsey	Chertsey: Mark Nutt	Foxhills, Thorpe & Virginia Water: Jonathan Hulley	Ahead: Chris Townsend					
21 M/DC	Leatherhead	Leatherhead & Fetcham East: Tim Hall	Bookham & Fetcham West: Clare Curran		Horleys: Colin Cross				
22 M/DC	Dorking	Dorking S. & Holmwoods: Stephen Cooksey	Dorking Hills: Hazel Watson						
23 WABC	Cranleigh & villages	Cranleigh & Ewhurst: Liz Townsend							
24 EBC	Esher	East Molesey & Esher: Steve Bax	West Molesey: Ernest Mallett	The Dittons: Nick Darby	Hinchley Wood, etc.: Mark Sugden				
25 EBC	Cobham	Cobham: David Lewis							
26 TDC	Oxted	Oxted: Cameron McIntosh							
27 TDC	Lingfield & villages	Lingfield: Lesley Steeds	Godstone: Chris Farr						
28 WABC	Haslemere & villages	Haslemere: John Robini	Waverley Eastern villages: Kevin Deanus	Waverley Western villages: David Harmer					
29 M/DC	Newdigate & villages	Newdigate Rural: Helyn Clack							

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SURREY COUNTY COUNCIL**CABINET****DATE: 28 MARCH 2023****REPORT OF CABINET MEMBER: SINEAD MOONEY, CABINET MEMBER FOR CHILDREN AND FAMILIES****LEAD OFFICER: MICHAEL COUGHLIN, EXECUTIVE DIRECTOR FOR PARTNERSHIPS, PROSPERITY AND GROWTH****SUBJECT: A HOUSING, ACCOMMODATION AND HOMES STRATEGY FOR SURREY****ORGANISATION STRATEGY PRIORITY AREA: A GREENER FUTURE, THRIVING COMMUNITIES, NO-ONE LEFT BEHIND AND GROWING A SUSTAINABLE ECONOMY SO EVERYONE CAN BENEFIT****Purpose of the Report:**

To set out a draft strategy for Housing, Accommodation and Homes for Surrey, for adoption and promotion by the County Council.

Recommendations:

It is recommended that Cabinet:

1. Endorse the benefit of and approach taken to initiating and developing a county-wide strategy for Housing, Accommodation and Homes,
2. Adopt the strategy and encourage others to do likewise in a spirit of collective endeavour to address the evidenced housing crisis in Surrey.
3. Delegate authority to the Cabinet Member for Children's Services and Housing and Executive Director for Partnerships, Prosperity and Growth to make any necessary final amendments to the strategy following a period of public consultation.

Reason for Recommendations:

The baseline assessment undertaken as part of the work of developing a strategy makes clear the challenges in housing, accommodation, and homes in Surrey, with advisors describing the situation as a crisis. While recognising the sovereign responsibilities and service responsibilities for Housing and Planning of other organisations, the strategy sets out a 'Call to Government' and a 'Call to Action' to which everyone involved in housing in Surrey is encouraged to contribute.

Executive Summary:

1. Housing plays a fundamental part in people's wellbeing, their employment, health and relationships. Housing conditions, accessibility and mix are key determinants of a thriving and sustainable workforce and economy. Housing also links strongly to

poverty, including fuel poverty, the cost of living as well as climate change and net zero ambitions.

2. In response to strong economic, health and community drivers and powerfully voiced concerns to improve housing, accommodation and homes in Surrey, a baseline assessment was initiated and produced highlighting the current state of housing accommodation and homes across Surrey, as the foundation for a partnership strategy.
3. The baseline assessment presents a rich picture of housing need including for the following groups and typologies:
 - Homelessness and those seeking Temporary Accommodation
 - Extra Care & Nursing
 - Children's accommodation and Care Leavers
 - Refugees and asylum seekers
 - Social and affordable housing
 - Supported Housing
 - Student Housing
 - Private Rented
 - Private Ownership.
4. Having regard to the baseline assessment, it is clear that Surrey is facing a complex and challenging housing crisis, affecting the lives of local residents, local businesses and local public services and entrenching the hardships that Surrey's most vulnerable residents face. This arises from the extremely high land values across a large geography, the very low rates of housing affordability, the very high proportion of Green Belt designations and other protected land types, an ageing population with reducing proportions of younger professionals; and the close proximity to London and Heathrow and Gatwick Airports yet failing to sustain its positive economic status compared to neighbouring regions.
5. As a result, homelessness is on the rise, demand outstrips supply for affordable homes, assisted living for older residents, placements for children, student housing and market private rental and the pipeline of further development fails to meet the gap by several orders of magnitude.
6. The strategy sets out, for the first time, i) an overview for all interested parties of the current state of housing, accommodation, and homes in Surrey, ii) an analysis of the commonalities, shared challenges and opportunities that confront decision-makers and service providers across Surrey, supplementing the work District and Borough Councils do at a local level and iii) a proposed Call to Government and Call to Action, in support of addressing the issues and challenges identified.

APPROACH TO DEVELOPING THE STRATEGY

7. Commissioned as advisors, Inner Circle Consulting undertook extensive desk-top research from gold standard, publicly available sources, including the Office for National Statistics (ONS), from the Department of Levelling Up, Housing & Communities, and from statistical returns prepared by District and Borough Councils in Surrey.
8. This quantitative data was supplemented, interpreted and 'stress-tested' through interviews with 31 stakeholders, to hear first-hand their experience and view of housing in Surrey. Meetings were held with housing officers in the districts and boroughs, with council Chief Executives, with Housing Associations, the NHS,

Homes England, universities, private developers and business representatives. Having analysed the data, with the support of detailed local knowledge through stakeholder interviews, eight priority areas were identified for further interrogation. (A summary of the Baseline Assessment is set out in the strategy at Appendix A and is available at www.surreyi.gov.uk).

9. In the autumn of 2022, four thematic workshops were held, with a broad cross-section of partners brought together, in-person, to discuss and debate both the evidence and potential ways of addressing identified problems. The four workshops focused on: i) supporting vulnerable residents & housing affordability; ii) an ageing population & under occupation of housing; iii) public sector land & delivery capacity; and the iv) climate crisis and the twenty-minute neighbourhood concept.
10. In December 2022, a Surrey Housing Summit brought together over 100 Members/Councillors, officers and external partners. Work to date was presented alongside two speaker panels offering local testimony to the scale of the crisis, as experienced by both the private and public sectors and potential opportunities to tackle it. Questions and comments were collated from the audience in order that they could be taken into account in drafting the strategy.

A STRATEGY FOR HOUSING, ACCOMMODATION AND HOMES IN SURREY

11. As a foundation for the Housing, Accommodation and Homes strategy, the baseline assessment demonstrates the extent of the challenge in Surrey, which manifests most critically in the supply of homes that are truly affordable for local people, at all tenures and most income groups. This shortage of housing affects the lives of many local residents. It also deters or prevents people moving to, or staying in, Surrey. Critically, local businesses, the NHS and other public services are struggling to recruit and retain the staff needed to maintain good quality public services and a thriving local economy.
12. The proposed Strategy for Housing, Accommodation and Homes attached at Appendix A, sets out the multiple dimensions and issues at play in the Surrey housing eco-system. Action to tackle the housing crisis in Surrey requires simultaneous interventions on multiple fronts and the set of interdependencies can mean that in practice, improving individual aspects of housing, can have potential negative consequences on other aspects.

Recommendations for action

13. The strategy sets out two broad areas of recommendations, drawn from the analysis of the baseline assessment – these are grouped as a ‘Call to Government’ and a ‘Call to Action’.

A Call to Government

14. Local Government in Surrey needs more powers and more funding to tackle the housing crisis to accelerate development from private developers and to play a greater role in land assembly, using compulsory purchase powers to bring forward suitable land for housing and infrastructure.

15. There is a need for reform in the structure and longevity of government funding, focused on planning for the longer-term to meet local strategic need.
16. Where funding is available, it often falls short of the amount needed to fund Social Rent, as distinct from Affordable Rent homes. To meet local need, Surrey needs more grant funding for Social Rent, at scale, and at a level that makes it viable as part of all types of residential development in the County.
17. Grant funding rules should be changed to require an uplift in floorspace, rather than new units, or to provide funding for replacement homes, where this leads to the provision of better-quality and lower carbon-emitting homes. This would help to unlock brownfield and town centre sites where landowners, including councils, cannot make the finances work to rebuild or redevelop land to provide much needed housing.
18. Given the relationship between mobility, transport and sustainable housing, proportionate funding is required for good quality local bus services, the retrofit of housing and/or the funding of replacement homes within regeneration schemes.

A Call to Action

19. The strategy sets out a number of proposals for how partners across the County can lead and drive improvements in housing, accommodation and homes and address the housing crisis, by working better together, including:
 - sharing best practice and starting to coordinate and align interventions and resources and look to future initiatives such as pooling budgets between services and authorities, especially where support is provided to vulnerable residents and teams through county, D&Bs, housing associations and voluntary sector organisations.
 - expanding Homeshare schemes amongst anchor institutions and key employers could unlock significant numbers of rooms in underoccupied homes for key workers.
 - a greater range of older people's housing is required to meet the wider range of preferences and lifestyles of a diverse ageing population already residing in Surrey. This is closely tied to the need for more step-down housing as an interim step between hospital and home care.
 - Partners should try to increase the proportion of Social Rent housing, especially family-sized homes, recognising that Affordable Rent homes are increasingly out of reach for families in the greatest need. Partners should explore ways to subsidise turning Affordable Rent units into Social Rent homes over time to respond to this affordability challenge.
 - Comprehensively mapping public sector land, continuing work to develop an effective and dynamic One Public Estate partnership, and working together to create common principles for land disposal and development would streamline and accelerate housing delivery without being so dependent on speculative external applications through the planning process.

- To protect green space and encourage more sustainable living in the face of the climate crisis, partners should look to incorporate 20-minute neighbourhood principles into local policies and masterplans for new sites and look to support more active transport infrastructure across Surrey to make it easier to walk and cycle from residential, community, leisure and commercial areas.
- To accelerate the delivery of higher density (as opposed to high rise) flatted development in town centres, to support local economic vitality and vibrancy, more Build-to-Rent (BTR) housing in town centres should be supported and encouraged.
- Almost all councils in Surrey have declared a climate emergency and have set targets for reaching net zero carbon. All stock-holders are exploring routes to retrofit and investigating the condition of their stock and Surrey County Council is already working to provide grants and support for retrofit. The opportunity should be taken to pooling buying power. In addition, this is a significant opportunity for Surrey to develop a strong local retrofit economy, by working with schools and colleges, reskilling for trained adults, space and support for industry to develop and grow locally, so that as this market develops and matures, local residents are able to benefit from jobs as well as better homes.

20. The strategy presents the evidence and, after considerable and extensive engagement with key partners, proposes ways that these issues can be addressed by willing partners. It is for the wider partnership in Surrey, between councils, housing associations, other public sector land-owners, service providers and the private sector to work together to meet these objectives.

Consultation:

21. The Baseline Assessment and draft strategy have been presented and discussed with a range of interested parties, including District and Borough Council Housing and Planning officers, Chief Executives and Leaders, Homes England, Registered Social Landlords, and the Health and Well-being Board, as well as at the Housing Summit in December 2022. The comments, concerns, and contributions expressed at every stage have been taken into account in the final draft strategy.

Risk Management and Implications:

22. Initiating a strategy, the outcomes of which rely on a collaborative approach and mutually reinforcing contributions from a range of partners carries the risk that there is insufficient commitment and buy-in to its delivery, arising from different and potentially mis-aligned priorities, perspectives and policies.
23. Given the wider policy and strategic context in which housing, accommodation and homes sit, there is a risk that that the conditions for success are not present and partners' time, effort and resources committed to the work do not secure value for money.
24. The extensive research and analysis that contributed to the baseline assessment and programme of engagement with key stakeholders and partners on the assessment and draft strategy are intended to mitigate both the above risks.

Financial and Value for Money Implications:

25. Many of the costs associated with the fulfilment of the strategy are already contained within existing budgets held by the County Council (e.g. Land and Property) and/or other partners (e.g. Housing, Planning). and/or by re-directing resources and staff.
26. As the work of implementing the strategy develops, further consideration will be given to any additional costs, and where and to whom they fall. Business cases, where required, will be produced in support of any funding requirements.

Section 151 Officer Commentary:

27. Although significant progress has been made to improve the council's financial position, the financial environment remains challenging. The UK is experiencing the highest levels of inflation for decades, putting significant pressure on the cost of delivering our services. Coupled with continued increasing demand and fixed Government funding this requires an increased focus on financial management to ensure we can continue to deliver services within available funding. In addition to these immediate challenges, the medium term financial outlook beyond 2022/23 remains uncertain. With no clarity on central government funding in the medium term, our working assumption is that financial resources will continue to be constrained, as they have been for the majority of the past decade. This places an onus on the council to continue to consider issues of financial sustainability as a priority in order to ensure stable provision of services in the medium term.
28. There are no immediate direct financial impacts in agreeing the recommendation. Further work will be undertaken to establish any financial implications arising from implementing plans to support the delivery of the strategy which would need to be factored into the Medium-Term Financial Strategy as part of future budget planning processes. As such, the Section 151 Officer supports the recommendations.

Legal Implications – Monitoring Officer:

29. The Council has wide powers to promote or improve the economic, social and environmental well-being of their area which includes the adoption of a strategy for Housing, Accommodation and Homes for Surrey. There are no specific legal implications at this stage.

Equalities and Diversity:

30. The proposed strategy for Housing, Accommodation and Homes addresses the needs of a number of excluded and minority groups and communities, including children, older people, refugee and asylum seekers, and those experience housing and fuel poverty.
31. The equalities and diversity implications for specific proposals, schemes and/or developments will be addressed as they come forward.

Other Implications:

32. The potential implications for the following council priorities and policy areas have been considered. Where the impact is potentially significant a summary of the issues is set out in detail below.

Area assessed:	Direct Implications:
Corporate Parenting/Looked After Children	The baseline assessment took into account children's placements and accommodation issues
Compliance against net-zero emissions target and future climate compatibility/resilience	The strategy references the contribution that housing makes to CO2 emissions and the importance of retro-fitting properties.
Public Health	The contribution that housing makes to individual and population-wide physical and mental is one of the key drivers for the preparation of the strategy.

What Happens Next:

33. The strategy, subject to its adoption by Cabinet, will be used to guide a number of internal workstreams within the County Council (e.g. ASC and Children's accommodation, Halsey Garton Residential, etc.) Progress is already being made in respect of the One Public Estate across the County, including the establishment of a Surrey Estates Network. An initial meeting with Homes England in response to the strategy has taken place and support for the creation of a single database and mapping of all publicly held land discussed.
34. It is proposed to organise a follow-up Housing Summit later in 2023, to enable a wide range of stakeholders involved in the preparation of the strategy to come together to review the progress being made and re-commit to future delivery. In addition, consideration will be given to establishing a multi-agency, county-wide Housing Forum, comprising representatives of Registered Social Landlords, District and Borough Councils, House builders, Government Agencies, etc.
35. The strategy will be promoted and publicised widely, as part of encouraging others to sign up to its recommendations and commit to collaborating on its delivery. Progress on its delivery will be periodically reported to the One Surrey Growth Board, Surrey Leaders and Health and Well-being Board.

Report Author: Michael Coughlin, Executive Director for Partnerships, Prosperity, and Growth, michael.coughlin@surreycc.gov.uk

Annexes:

Annex 1: A Housing, Homes & Accommodation Strategy For Surrey

Sources/background papers:

ONS Housing Data sets

District and Borough Councils' Housing data returns to Government

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A HOUSING, HOMES & ACCOMMODATION STRATEGY FOR SURREY

27-02-2023

Commissioned by Surrey County Council & Surrey Delivery Board

Produced by Inner Circle Consulting

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Introduction

... Purpose of this work

Housing plays a fundamental part in people's wellbeing, their employment, health and relationships. Housing conditions, accessibility and mix are key determinants of a thriving and sustainable workforce and economy. Housing also links strongly to poverty, including fuel poverty, the cost of living as well as climate change and net zero ambitions. There are strong economic, health and community drivers for seeking to improve housing, accommodation and homes in Surrey.

The purpose of this work has been to provide, for the first time, an overview for all interested parties of the current state of housing, accommodation and homes in Surrey in a broad and contextual way across the county as a whole, supplementing the detailed work each district and borough does at a local level.

The first phase of work, in summer 2022, produced a baseline assessment of the current situation. This allowed for:

- i) Drawing attention to the scale and seriousness of the housing crisis in Surrey;
- ii) The identification of a set of priority issues that are deserving of more co-ordinated action;
- iii) The identification of shared barriers and issues that partners can present to the Government as needing change in national policies, structures, processes and decisions;
- iv) Shared learning across the county, using this work as a catalyst for encouraging wider discussion, bringing key partners together around common issues of concern and act as a driver for greater collaboration; and
- v) Having identified those issues that Government needs to address, also identifying how willing partners in Surrey could practically and pragmatically collaborate on tackling these shared issues in the housing crisis, which is presented as a Call to Action.

This work was commissioned by Surrey County Council, with a scope agreed by the Surrey Delivery Board (comprising District and Borough Leaders and Chief Executives) and has been delivered by Inner Circle Consulting through wider engagement with key stakeholders.

Executive Summary

...Introduction

It is clear that there is a considerable amount of activity to encourage more housing, of all types, in Surrey, led by the district and borough councils; and examples of good partnership working to address specific need and opportunity. There are a number of barriers preventing successful delivery of the number and tenure of homes required to address need, however, and a recognition that more could be done, through partnership.

This strategy identifies opportunities for more partnership working and consolidates a joint call to the Government and a joint call to action to accelerate the solutions to the housing crisis Surrey now finds itself in.

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The strategy does not, and should not, duplicate the very good work of the local authorities in their planning and housing functions.

... Headlines from the data

Surrey is in the grip of a serious housing crisis. While this is very different from the scale and severity of the housing crises that might be seen in large cities, it is a crisis nonetheless and action is required to tackle it.

This housing crisis manifests most critically in the supply of homes that are truly affordable for local people, at all tenures and most income groups. This shortage of housing affects the lives of many local residents. It also deters or prevents people moving to, or staying in, Surrey. Critically, local businesses, the NHS and other public services are struggling to recruit and retain the staff needed to maintain good quality public services and a thriving local economy.

The high-quality way of life that Surrey is known for, and that residents rightly celebrate and wish to protect, is at risk from the shortage, quality and unaffordability of homes.

The housing crisis is not a single event. There are multiple strands, and action to tackle the housing crisis in Surrey requires simultaneous interventions on multiple fronts: there is no silver bullet solution – and the reality is that in improving one aspect of housing, there are potential negative knock-on consequences elsewhere.

... Recommendations for action

Partners across Surrey need to work collaboratively to tackle the housing crisis. It is absolutely not an admission of individual shortcoming to recognise that more can be achieved together than alone. In almost every aspect of work, more joint working and collaboration stands to yield better results for local people. Partners also have a golden opportunity, through joint work on public sector land, to take a stronger hand

in the delivery of housing in the county, and so more proactively determine the quantity, tenure and quality of homes.

... A Call to Government

Local Government in Surrey needs more power and more funding to tackle the housing crisis. To justify this, Surrey also needs to correct the record with popular perception. The conventional wisdom from those outside the county is that there can't be any problems in Surrey because of its historical reputation as a prosperous and successful part of the country. Making a case to Central Government or other funding bodies means telling a balanced and accurate story about the state of Surrey.

Local Government in Surrey would benefit from **greater powers to accelerate development from private developers** and a stronger hand in **land assembly and compulsory purchase powers to bring forward suitable land for housing and infrastructure**.

There is a need for **reform in the structure and longevity of government funding**, which often forces partners to dedicate resource to bid writing for small short-term pots of funding instead of planning long-term to meet local strategic need.

Where funding is available, it falls short of the amount needed to **fund Social Rent instead of 'so-called' Affordable Rent homes, the retrofit of housing or the funding of replacement homes within regeneration schemes**.

... A Call to Action

Faced with other crises, partners in Surrey have worked quickly, effectively, and collaboratively; bringing ingenuity and creativity to solve problems on behalf of Surrey residents. That approach needs to be brought now to the Housing Crisis in Surrey.

This starts with **sharing best practice** between partners in the county so the same good idea doesn't have to be invented 11 times and could go much further by starting to coordinate and aligning interventions and resources and look to future initiatives such as **pooling budgets between services and authorities**. This is particularly true where support is provided to vulnerable residents and teams through county, D&Bs, housing associations and voluntary sector organisations. This approach should also see the **expansion of existing joint-working between neighbouring D&Bs to create larger, more strategic housing teams across Surrey**. **Local Government that can make best use of scale to drive better outcomes for residents**.

In meeting local housing need, **expanding Homeshare schemes** amongst anchor institutions and key employers could unlock significant numbers of rooms in underoccupied homes for key workers. Meanwhile, **a greater range of older people's housing needs to be built** to meet the wider range of preferences and lifestyles of a diverse ageing population already residing in Surrey. This is closely tied to the need for **more step-down housing as an interim step between hospital and home care**.

Within the affordable housing sector, it's clear that, while "Affordable Rent" offers a more affordable home for some residents, it remains inaccessible to higher-need families who are unable to afford that level of rent. This leads to some high-need families remaining in Temporary Accommodation, which is insecure for residents and expensive for Local Authorities. Partners should try to increase the proportion of **Social Rent housing, especially family-sized homes, recognising that Affordable Rent homes are increasingly out of reach for families in the greatest need. Partners should explore ways to subsidise turning Affordable Rent units into Social Rent homes over time to respond to this affordability challenge.**

The greatest potential for Surrey Local Government, housing associations and other public bodies, such as the health sector and the Ministry of Defence in taking a stronger hand in the scale, size and affordability of new homes across the county is to make use of their existing land reserves. There is no consolidated map or register of publicly-owned land and no strategic approach across these key landowners to how that land could best be put to use, or who could deliver homes that are needed.

Mapping public sector land, establishing an effective and dynamic One Public Estate partnership and working together to create common principles for land disposal and development would streamline and accelerate housing delivery without being so dependent on speculative external applications through the planning process. This approach requires public sector land owners to accept the fundamental principle that disposal of land cannot only be seen through a lens of maximising commercial return, but on achievement of wider objectives and community value such as facilitating the supply of new homes for social rent.

There are several good examples of high density, mid-rise developments in the County which exemplify the 20-Minute Neighbourhood principle and allows for greater independent living and more economically vibrant town centres. A lot of development, however, remains low-density, land-intensive and car-dependent. To protect green space and encourage more sustainable living in the face of the climate crisis, partners should look to **incorporate 20-minute neighbourhood principles into local policies and masterplans for new sites and look to support more active transport infrastructure across Surrey to make it easier to walk and cycle from residential, community, leisure and commercial areas.**

To accelerate the delivery of higher density (as opposed to high rise) flatted development in town centres, to support local economic vitality and vibrancy, **councils should explore supporting more Build-to-Rent (BTR) housing in town centres** to create a new housing offer away from the dominance of demand for market sale houses.

Retrofit and improvement of existing homes, whether in private, council or housing association ownership will be of growing importance in coming years. Higher energy prices have changed the financial calculus for better-off families about whether to invest in insulation and heat pumps. Within the social sector there is a growing debate on how to fund retrofit, but a strong commitment that when funding becomes available it should be pursued. This represents not only a potential significant benefit for Surrey residents, but also a potential boost to the local economy and also

contributes to net zero with a reduction in the use of embedded carbon in demolition and rebuilding. **Partners should collaborate on mapping the training, up-skilling and supply chain support needed to foster a local retrofit industry, so that when this market takes off, local residents benefit from jobs as well as better homes.**

In the face of much lower domestic migration statistics than comparator counties in the South-East, it is important to recognise that Surrey is competing against a wide choice of locations across the South-East, and the rest of the country; it is not simply a case of 'build it and they will come'. **Updating and telling a Surrey Story for the twenty-first century** is a key part of understanding what will attract new economically-active residents into Surrey – so that the good quality of life in Surrey is preserved for future generations.

This strategy presents the evidence and, after considerable and extensive engagement with key partners, proposes ways that these issues can be addressed by willing partners. It is for the wider partnership in Surrey, between councils, housing associations, other public sector land-owners, service providers and the private sector to work together to meet these objectives.

Methodology

Inner Circle Consulting was commissioned to prepare this work in the summer of 2022 with a scope agreed by the Surrey Delivery Board. The work was overseen by a steering group comprising representatives from District & Borough Chief Executives, Housing Officers, Raven Housing Trust & Surrey County Council.

This work has been prepared by following the existing evidence. Districts and Boroughs in Surrey have a detailed understanding of local need and demand. Through the preparation of local plans, of local housing strategies and their work day-to-day, they know their immediate area in far more granular detail than this work attempts to cover.

... Gathering the Baseline Assessment

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Instead, this work provides, for the first time, a broad contextual analysis of the commonalities across the county, of the shared challenges and opportunities that confront decision-makers and service providers right across Surrey. The evidence is rooted in publicly available gold standard sources. During summer 2022, data was gathered from the Office for National Statistics (ONS), from the Department of Levelling Up, Housing & Communities, and from statistical returns prepared by the districts & boroughs in Surrey.

This data presents a snapshot of the situation. To interpret it and to understand the nuance behind the numbers, meetings were held with 31 stakeholders from across the county to hear first-hand their experience and view of housing in Surrey. Meetings were held with housing officers in the districts and boroughs, with council Chief Executives, with Housing Associations, the NHS, Homes England, universities, private developers and business representatives.

While perspectives varied, the unifying message from these meetings is that Surrey is in the grip of a serious and multifaceted housing crisis.

Having analysed the data, with the support of detailed local knowledge through stakeholder interviews, eight priority areas were identified for further interrogation. This Baseline Assessment was presented to the Surrey Delivery Board and to Surrey County Council elected members. Individual meetings were also offered to the leaders of the eleven districts and boroughs. A summary of the Baseline Assessment is available at www.surreyi.gov.uk.

... Testing through workshops

In the autumn of 2022, four thematic workshops were held, with a broad cross-section of partners brought together, in-person, to discuss and debate both the evidence and potential ways of addressing identified problems. In many cases it was the first time participants had met in person, or the first time they'd sat down together since before the COVID pandemic started. The four workshops focused on:

supporting vulnerable residents & housing affordability; an ageing population & under occupation of housing; public sector land & delivery capacity; and the climate crisis and the twenty-minute neighbourhood concept.

... Surrey Housing Summit

In December 2022, a Surrey Housing Summit was held at Surrey County Council's Woodhatch offices, bringing together over 100 Councillors, officers and external partners. Work to date was presented alongside two expert panels offering local testimony to the scale of the crisis and potential opportunities to tackle it. Questions and comments were collated from the audience through a mobile application, Slido, so that as many participants as possible were able to interact throughout the day.

... Next Steps

This document presents the Baseline Assessment and the feedback gathered throughout extensive stakeholder engagement and presents back: a **Call to Government**: with what has been heard collectively from partners about what needs to change in national policy to address the Surrey housing crisis; and a **Call to Action**: outlining how partners in Surrey could work more effectively, collaboratively and with greater impact locally to meet local demand and need.

Understanding the Surrey Housing Crisis

Demand & Need

Whether relatively wealthy or deprived, homeowner, home renter or homeless; the demand for housing is far outstripping the supply of housing, irrespective of various sizes, typologies, and tenures of housing. This is having far reaching social and economic impacts, placing strain on core local public service delivery and undermining key health outcomes for local residents. If left unaddressed, these interdependent challenges will continue to compound and push higher proportions of the local population into poverty and disadvantage while at the same time negatively impacting the quality of life of all residents.

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To understand the breadth of demand for housing throughout Surrey, this strategy was developed on a Baseline Assessment that assessed housing need for the following groups and typologies:

- Refugees and asylum seekers
- Homelessness and those seeking Temporary Accommodation
- Social and affordable housing
- Supported Independent Living
- Student Housing
- Private Rented
- Private Ownership
- Extra Care Housing
- Residential & Nursing Care Homes
- Children in care

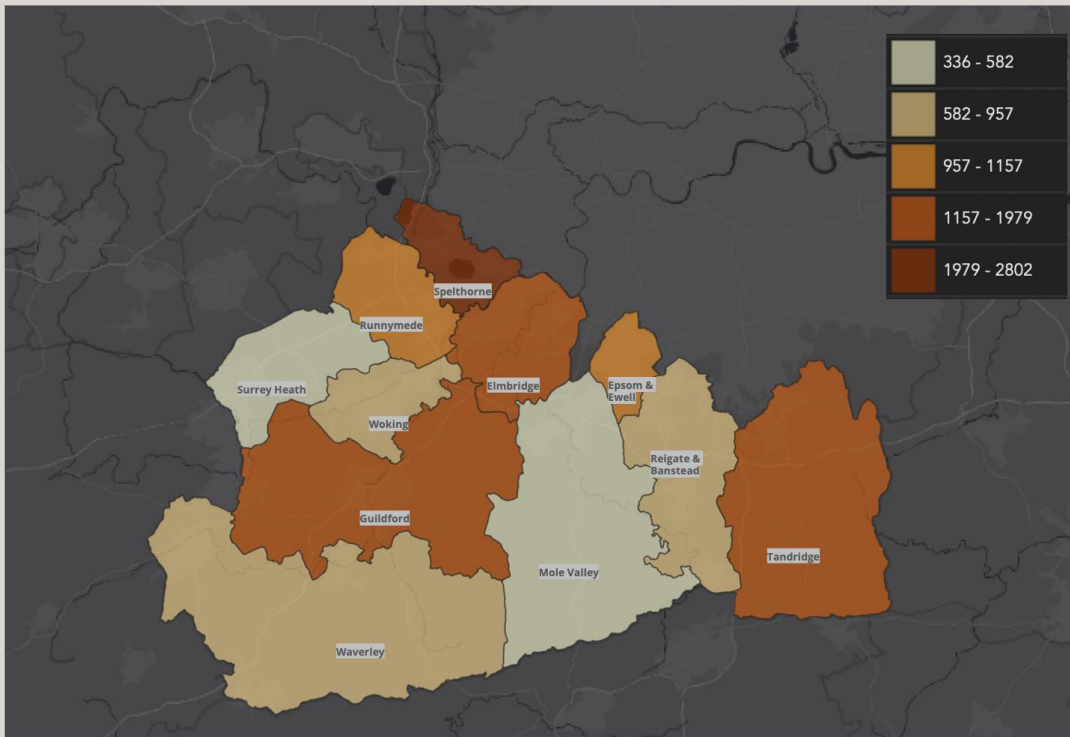
Through analysis of this data, it is abundantly clear that, like much of England, Surrey is facing a housing crisis, affecting the lives of local residents, local businesses and local public services and entrenching the hardships that Surrey's most vulnerable residents face. However the nature of the crisis across Surrey is different, more complex and more challenging than in some other areas. This arises from the extremely high land values across a large geography, the very low rates of housing affordability, the very high proportion of Green Belt designations and other protected land types, an ageing population with reducing proportions of younger professionals; and the close proximity to London and Heathrow and Gatwick Airports yet failing to sustain its positive economic status compared to neighbouring regions.

As a result, homelessness is on the rise, demand outstrips supply for affordable homes, assisted living for older residents, placements for children, student housing and market private rental and the pipeline of further development fails to meet the gap by several orders of magnitude.

Surrey's housing crisis is particular to Surrey. It is not as severe as exists in London or other large cities, but it is a crisis, which is affecting local public services, the local

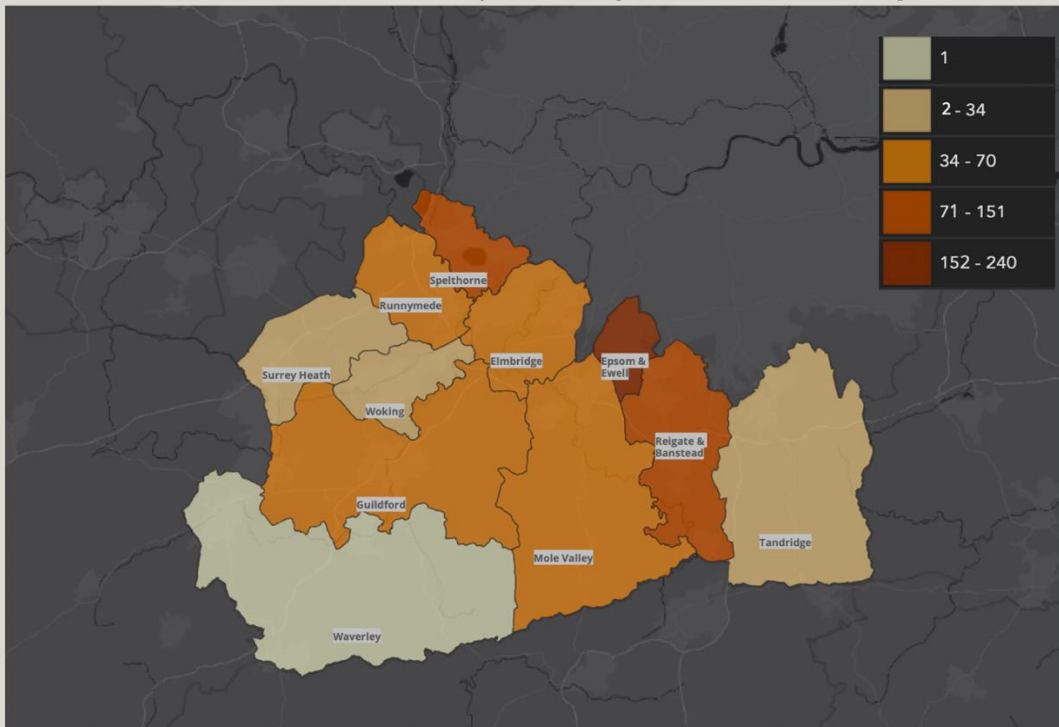
economy and preventing local residents from leading good lives in a place that is renowned for quality of life.

Numbers on housing registers across Surrey



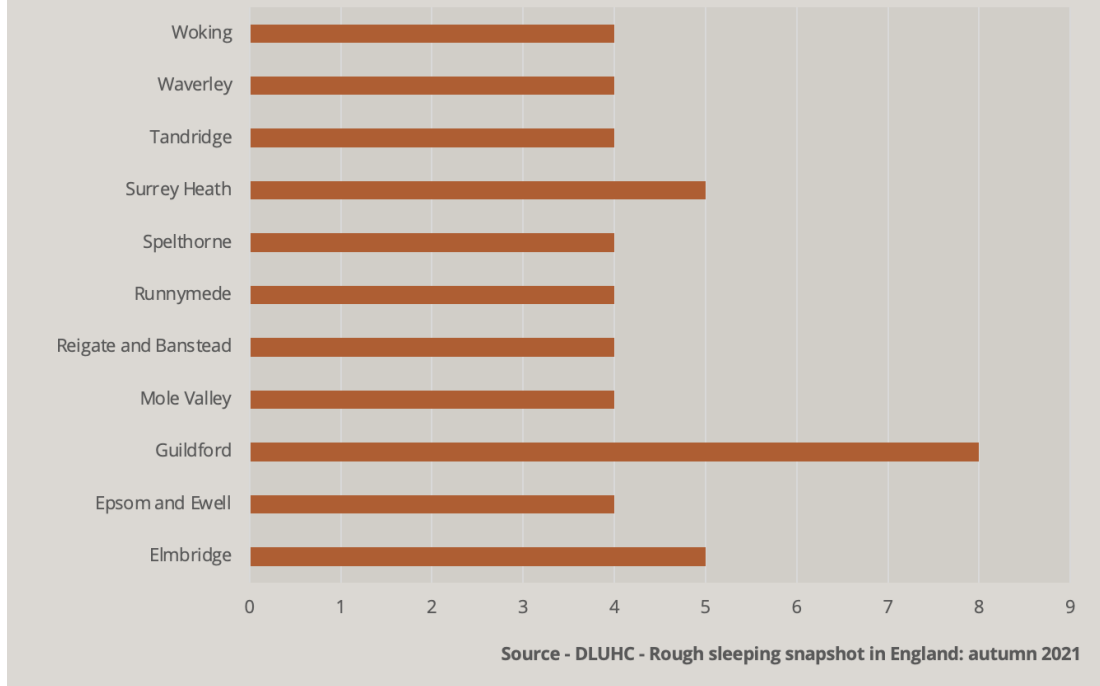
Source - Gov.UK, Local Authority Housing Statistics data returns, England 2020-21

Number of statutorily homeless households placed in temporary accommodation, most recent quarter, by the local authority



Source - DLUHC, Detailed local authority-level tables, January to March 2022

Estimated number of people sleeping rough on a single night in autumn 2021

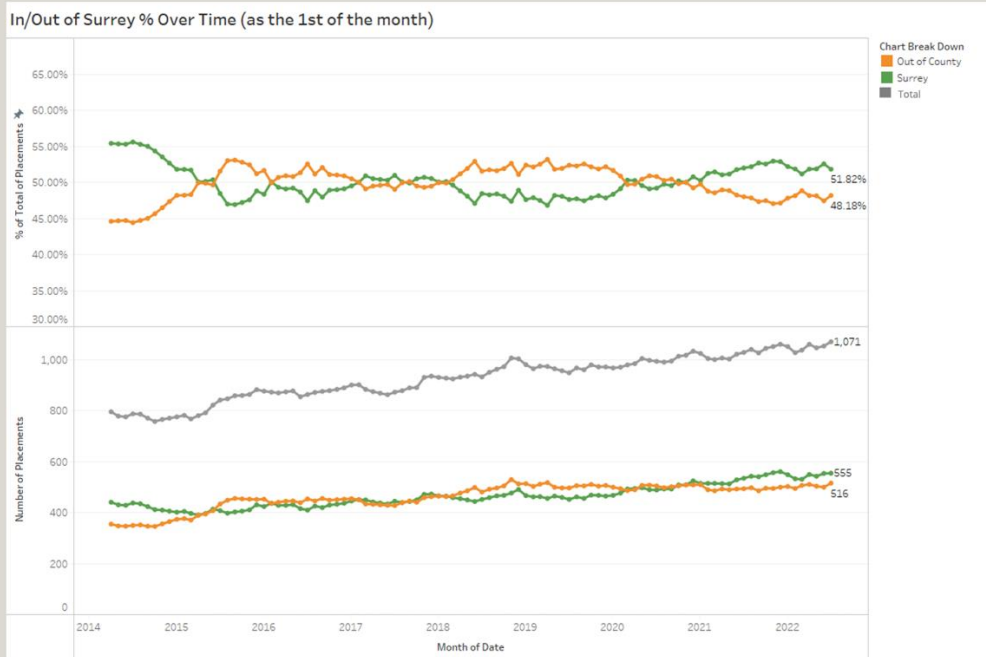


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While numbers varied across districts & boroughs (D&Bs), there are several thousand individuals and families waiting on housing registers across Surrey, while only a few hundred are being housed in temporary accommodation (TA). A shortage of suitable housing means that in some cases families from Surrey who become homeless are not able to remain in their local area and are placed in other Temporary Accommodation elsewhere in Surrey or out of the county, away from existing schools, work and social networks.

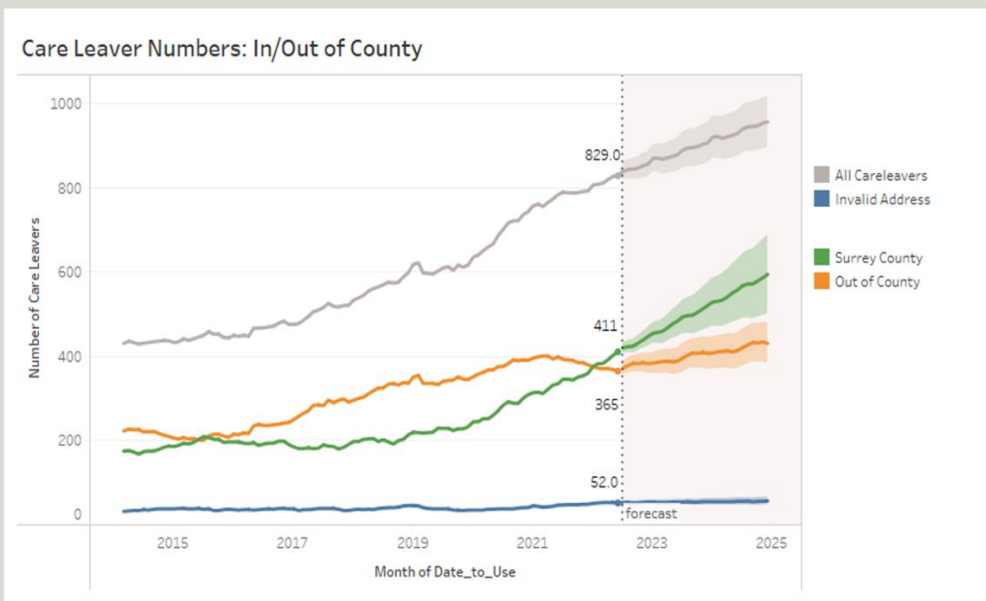
The above graph indicates that no more than an estimated 10 individuals are sleeping rough in any of Surrey's D&Bs on a given evening, and while street homelessness is a serious issue for those individuals affected, and more visible to other residents than homelessness in Temporary Accommodation, it is not a primary feature of the housing crisis in Surrey.

Looked After Children Placements In/Out of County: All Placements

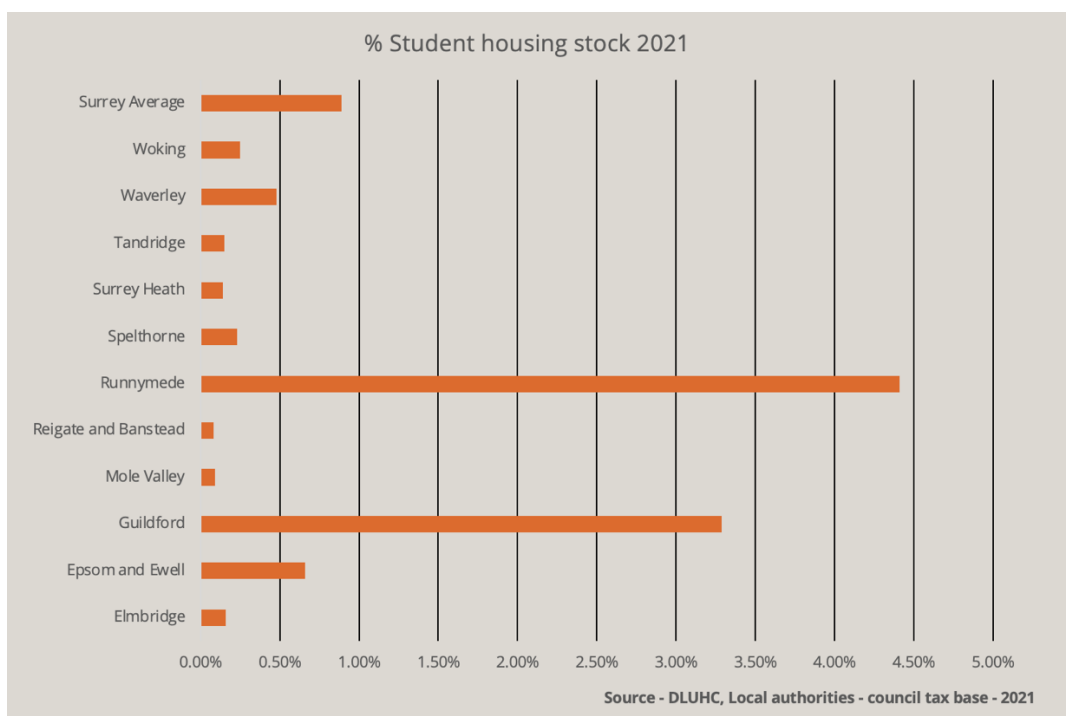
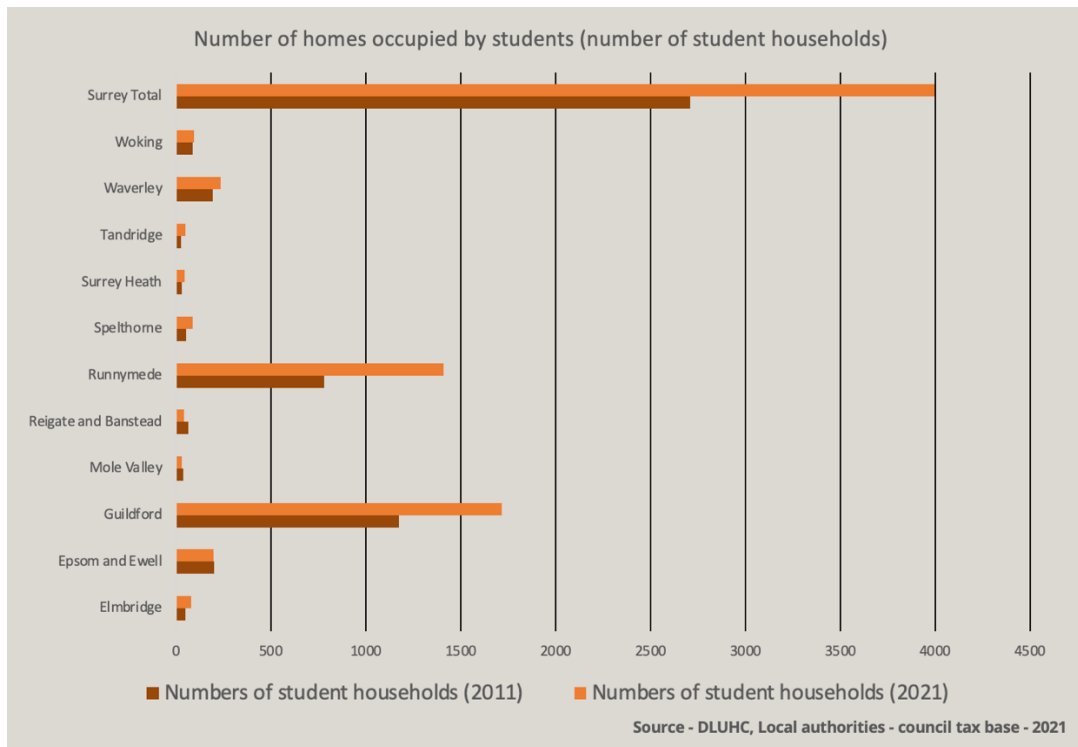


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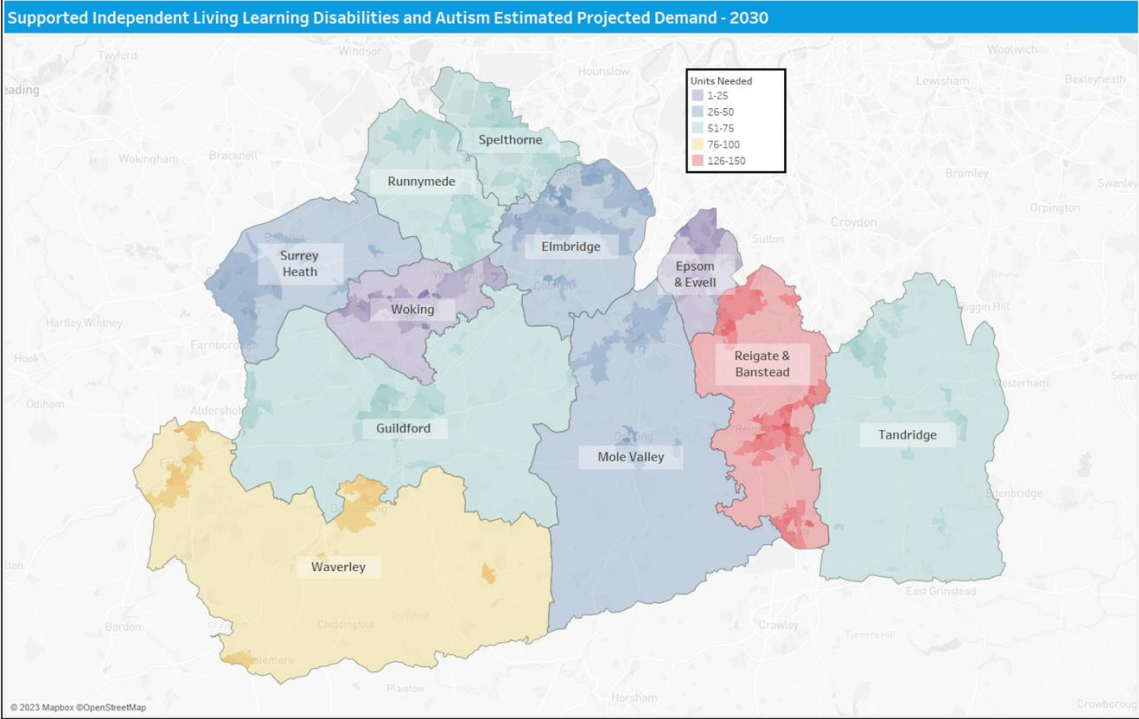
Care Leaver: Demand over time



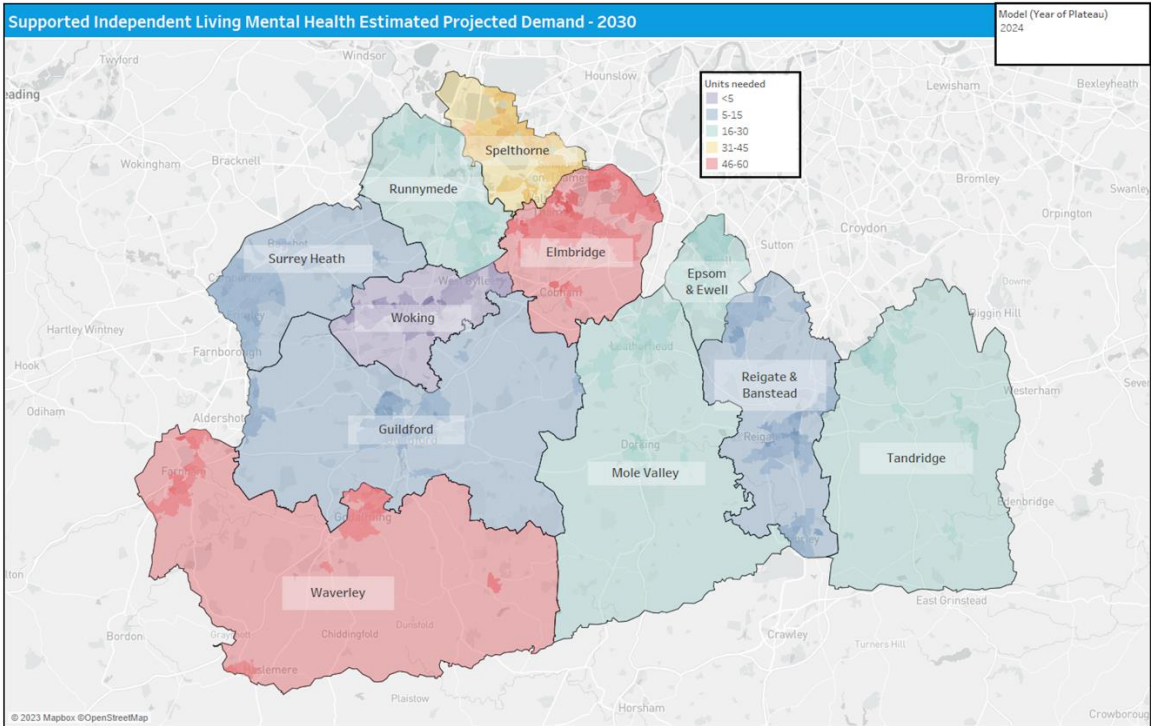
Figures provided by the County Council show that housing placements for children have steadily been rising in the last few years, and nearly half of those placements are being made out of the county due to the lack of available accommodation locally. While some of these children may be moving out of their locality to be re-homed with family elsewhere in the county – and for care leavers it could represent moving away to study or work – it nonetheless paints a picture of local housing systems under intense strain and results in having to move children out of the communities they know and have a strong connection with, simply due to a lack of suitable homes locally.



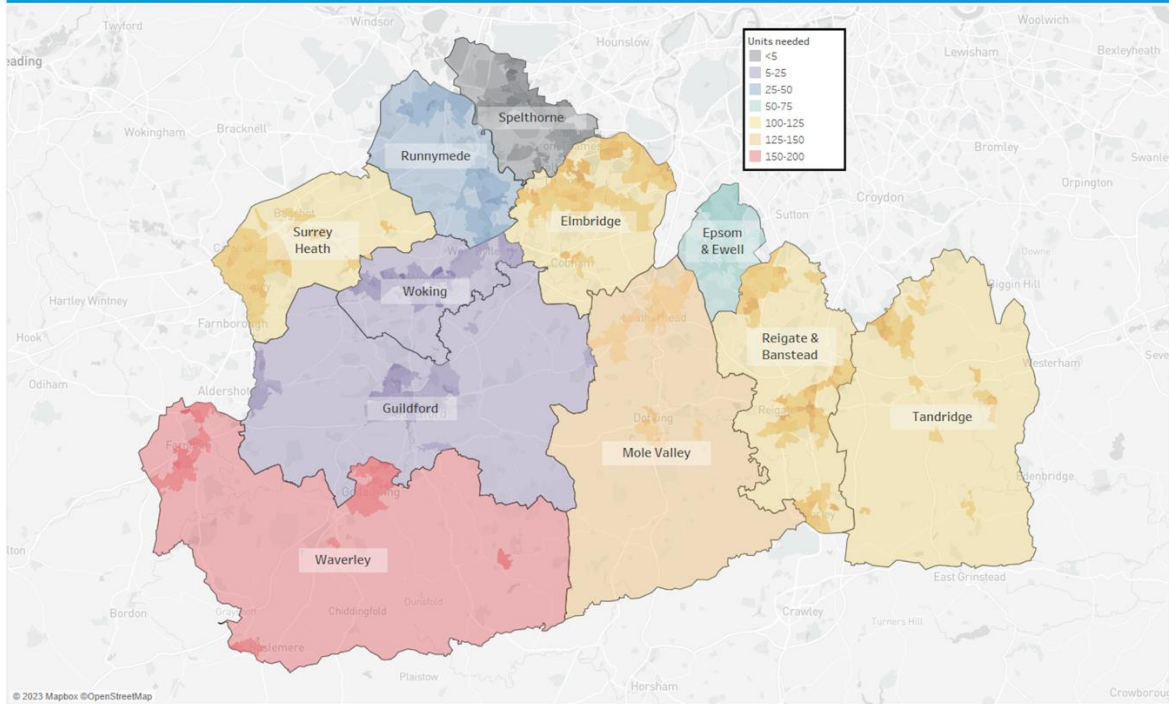
Numbers of student households have increased by an average of over 60% in 10 years, with particular concentrations in Runnymede and Guildford where this constitutes 3.5 – 4.5% of overall housing stock. As has been the case in similar circumstances elsewhere, this demand is likely to contribute to further pressure on private rental sector provision and housing of multiple occupation, particularly in town centres with access to universities and/or colleges and a higher concentration of night-time economy offerings. In addition, as students are exempt from paying council tax, this rapidly changing demographic places further strains on council services.



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Affordable Extra Care Housing Estimated Projected Demand - 2030

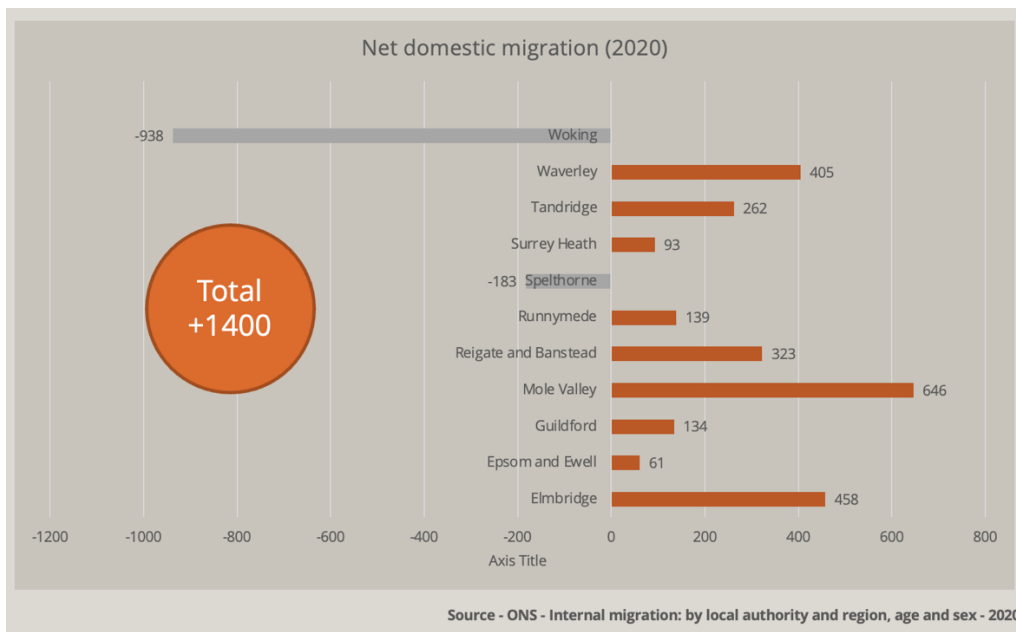


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The demand models above provide conservative estimates of predicted demand to 2030. They highlight a county-wide deficit in provision in both Supported Independent Living and Affordable Extra Care Housing.

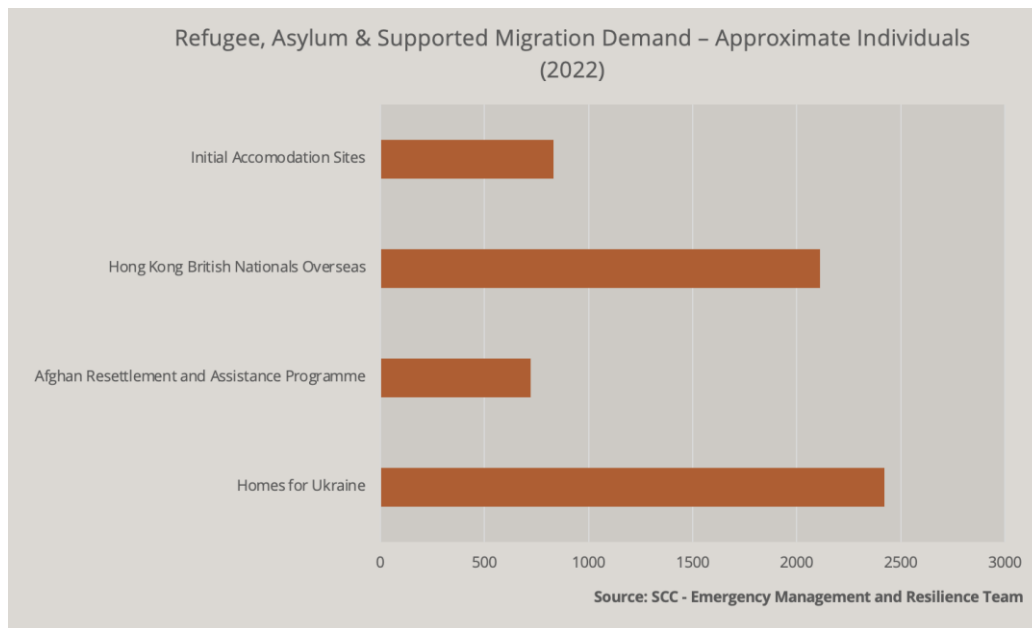
There are different pressures on the system for each of the provision types. Investing in these types of provision will ensure residents are able to stay close to their communities, maintain support networks, and mixmise independence.

All maps show the estimated deficit in need to 2030 on a district/ borough level based on current supply. Darker areas indicate higher levels of population density, and allude to potential favourable locations for future development.



In terms of net internal migration, Surrey has experienced significantly less than comparator counties: increasing by 1,400 residents in 2020 while in the same year Kent and Hampshire both gained over 6,000 net new residents, East and West Sussex, combined, gained 8,000 additional residents. These figures exclude unitary urban areas, and paint a stark picture about Surrey falling behind neighbouring counties in the south-east of England.

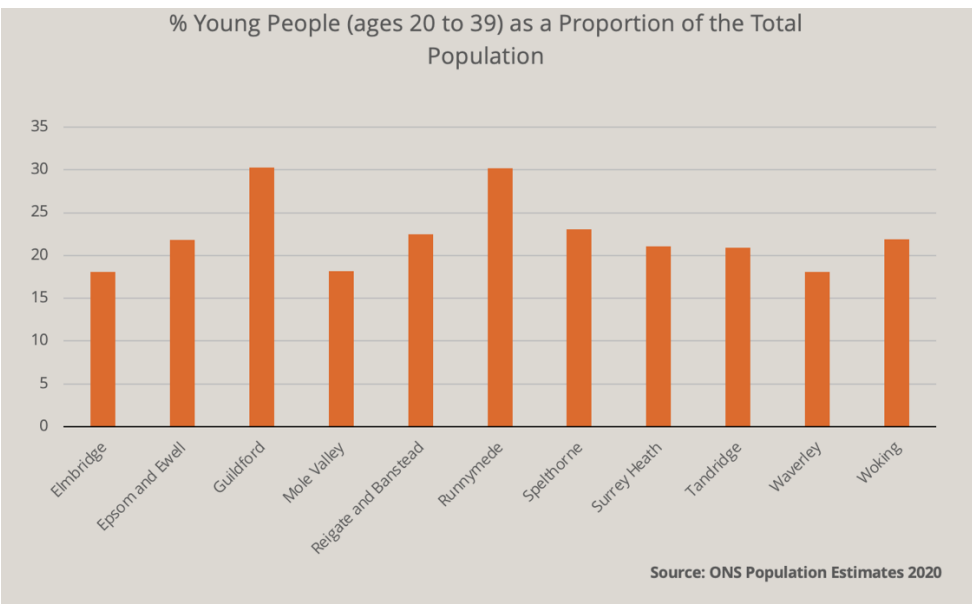
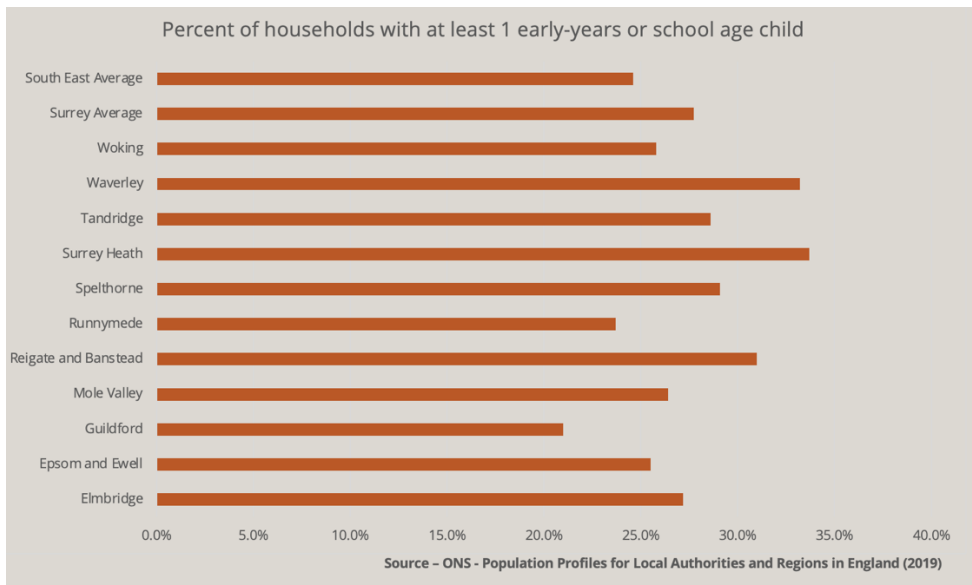
This illustrates, alongside other related measures, that not only is Surrey’s growth stagnant, but it is progressively falling behind comparators which are more successful at attracting the business owners and young professionals that contribute to economic growth and prosperity. This also reflects feedback from the NHS, Police and wider public services struggling to recruit and retain key staff.



Data provided by the County’s Emergency Management and Resilience Team shows that many Surrey families have taken in Ukrainian refugees, with approximately 2,500 individuals in placements across the county. Homes for Ukraine uses spare rooms of voluntary residents rather than taking up other stock - connecting to the high levels of under occupation that we see in the county. There is a risk of this presenting a longer-term issue on local housing demand if placements come to a natural end or break down prematurely, and as Ukrainian guests establish roots and gain employment .

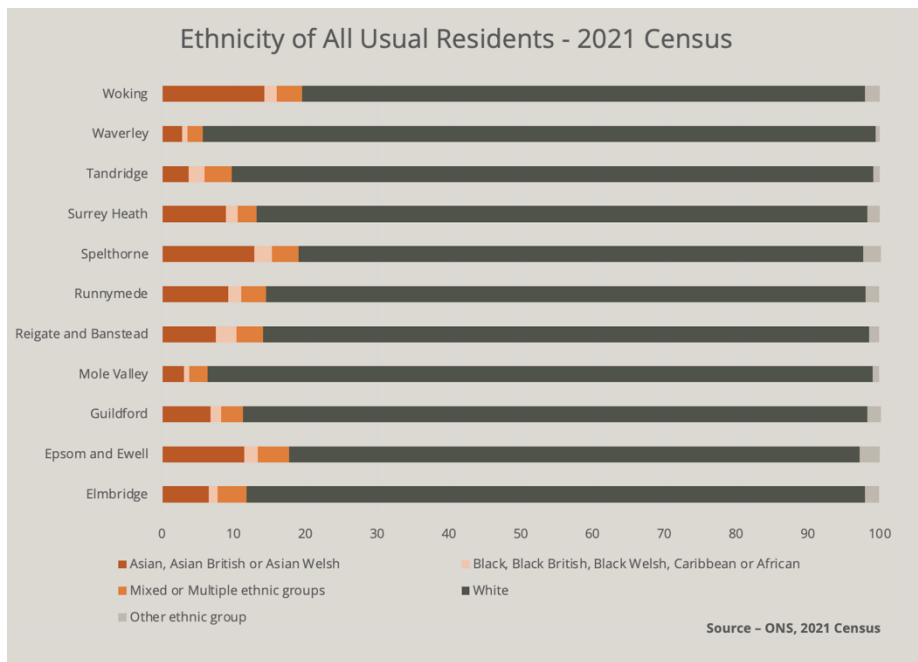
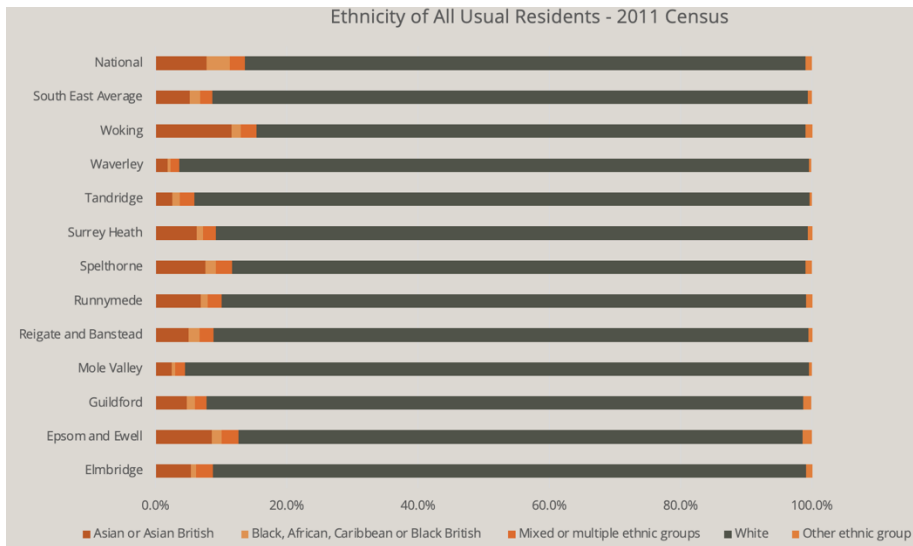
Private rent or home ownership will likely be out of reach of many refugee families if placements break down as the war continues and Ukrainians are unable to return home. In the absence of direct financial support from government this has the potential to place a significant further burden on the workloads of D&Bs to find alternative rehousing as families put down roots and form local connections.

Surrey has attracted significant numbers of migrants from Hong Kong; however, this population is largely financially self-sufficient and therefore reliant on private sector housing availability.



As a proxy for indicating the proportion of young families living in the county, the percentage of households with at least one early-years or school age child was extracted from the ONS. This indicates around a quarter of households in the county fitting in to this category. The percentage of young people (ages 20 to 39 years) as a proportion of the total population was used as a proxy for indicating the number of young professionals living in the county and shows 18 – 30% of district and borough populations falling within this category.

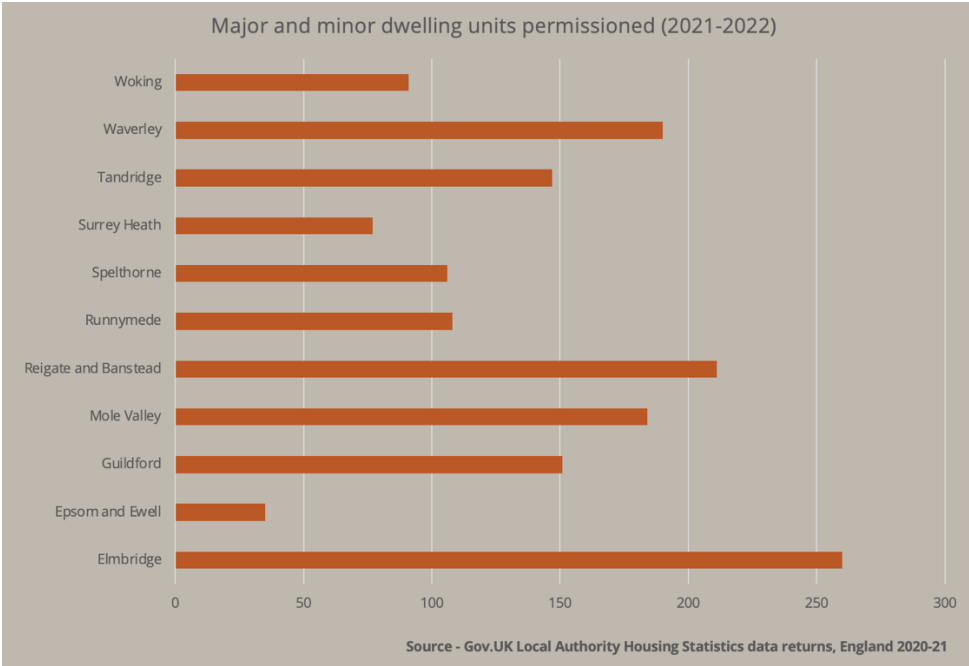
With relatively small numbers of young families and professionals, combined with minimal growth, there is a strong indication that they are being priced out of the county. Without housing for these groups in particular, there lies an existential threat to the Surrey way of life with an increasingly older population not matched by the proportion of younger residents to contribute to the economy, support growth and deliver essential services.



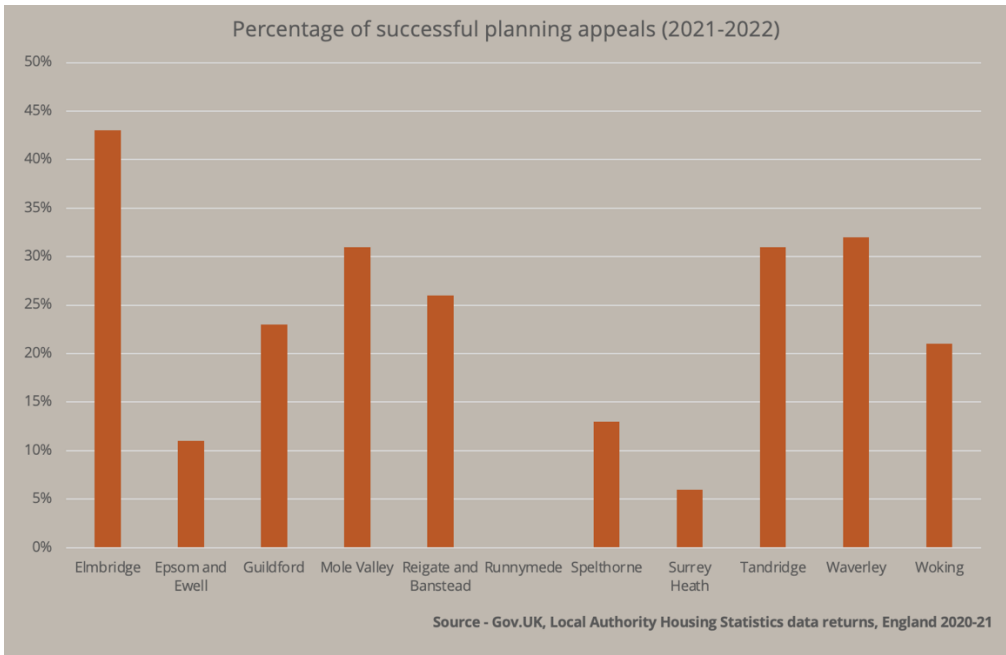
The demographic composition of Surrey is largely consistent with the wider South-East region. From 2011-2021 data, the ethnicity of Surrey has been predominantly White British, averaging around 80-90% across districts and boroughs, with minor increases largely among Asian or Asian British residents.

Supply

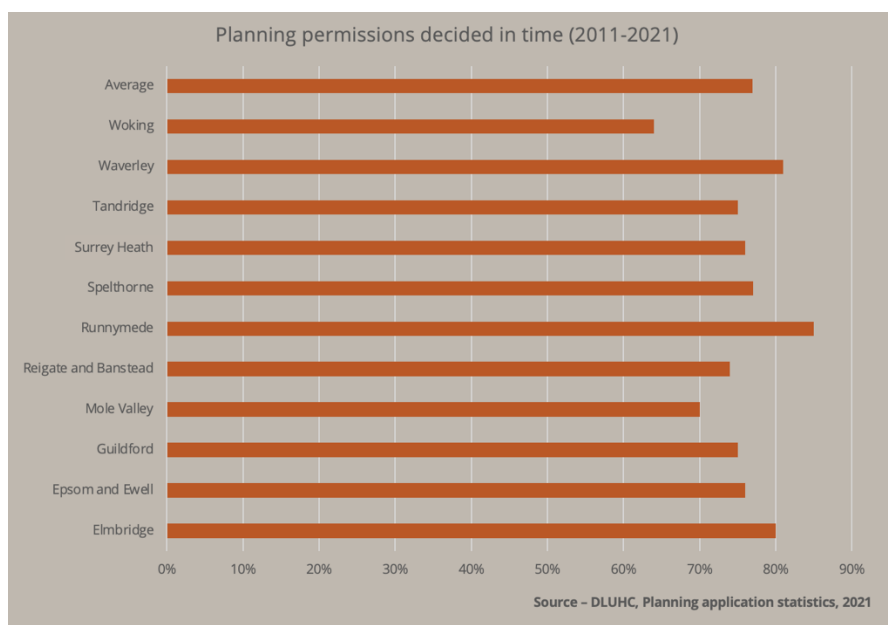
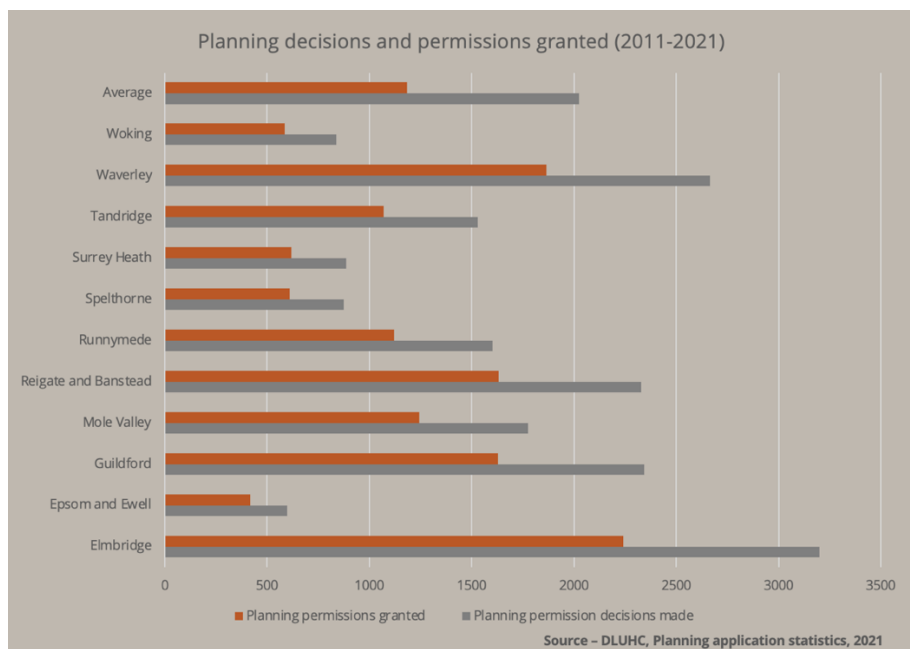
Key to meeting demand and tackling unaffordability is the provision of new housing to meet unmet and rising demand.



From 2021-2022, just over one thousand new dwelling units received planning permission across the county, with some boroughs and districts delivering a much greater share of this.

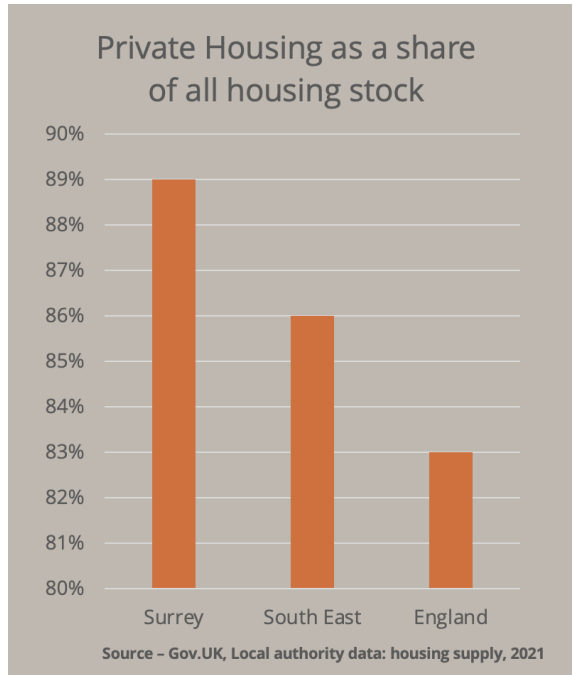


Successful planning appeals across the same period, were also measured and the data reflects that there were a number of policy-compliant development applications coming forward..

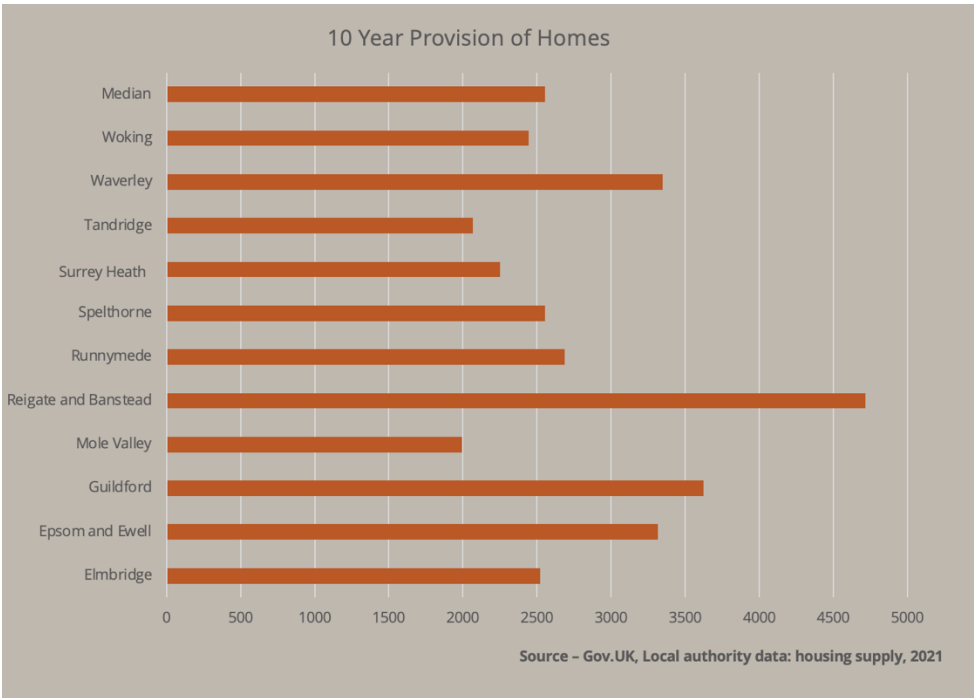


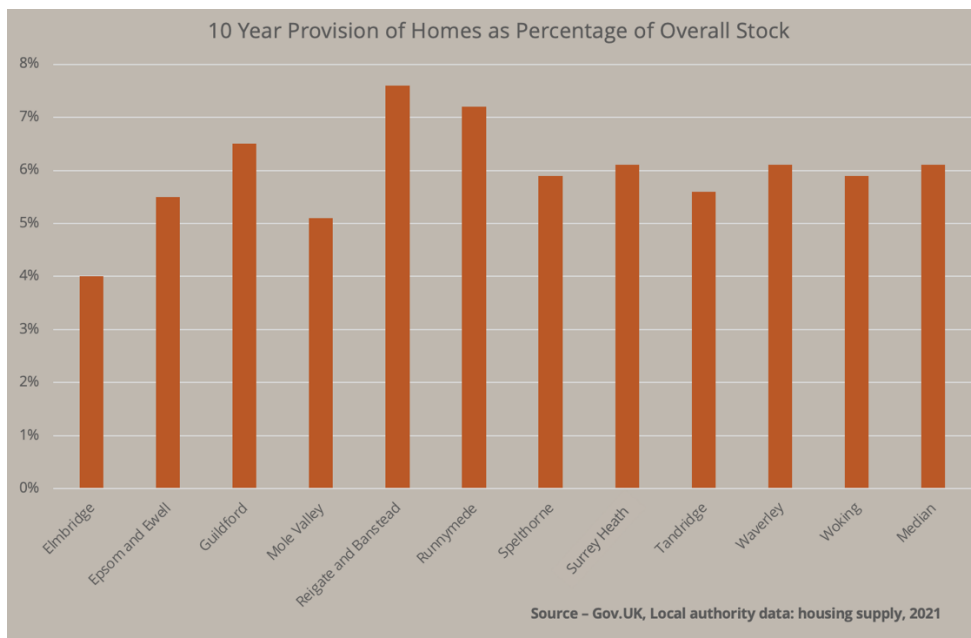
Across districts and boroughs, most planning applications were granted (either on application or following appeal) reflecting a need to attract more applications overall to meet demand. Capacity of local planning authorities is reflected well over the period of 2011-2021, despite a national and regional shortage of local government planning professionals, in that the vast majority of decisions were made and managed within the statutory timeframe. However, the limited supply of planning professionals will continue to be a challenge for all planning functions going forward.

As of 2021, 14,135 households across the county were registered as requiring support with housing, whilst, during the same decade, only 2,923 affordable rent homes and 1,788 social rent homes were built, representing approximately 6% of Surrey’s overall housing stock.

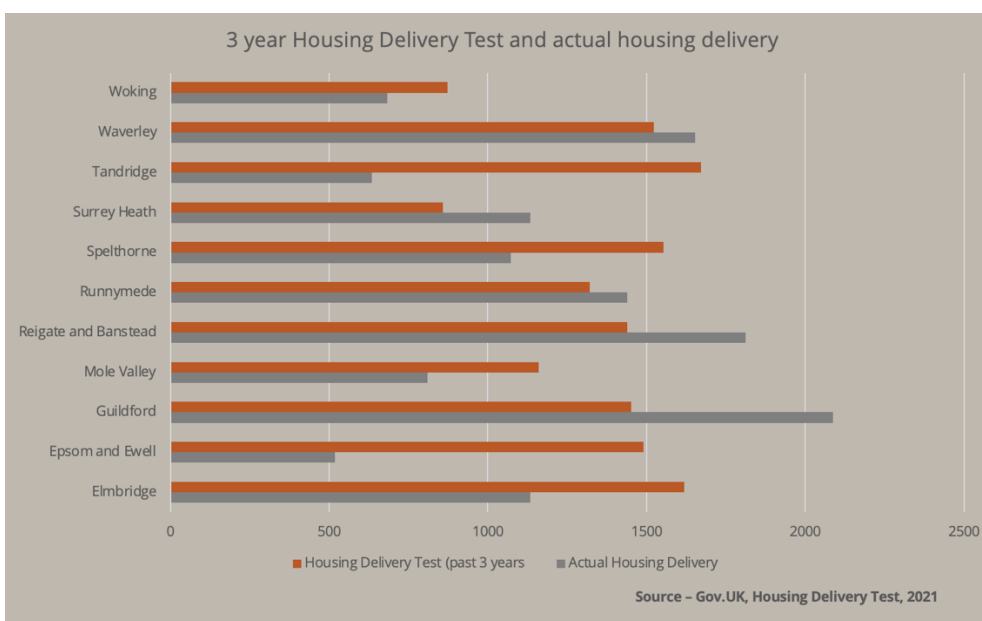


If Surrey’s housing market had the **same proportions of affordable housing as the wider South-East there would be an additional 10,170 affordable homes** in the county. If it had the same proportion as **the English average, which includes London and other main cities, there would be 25,424 more affordable homes.**





From 2011–2021, each district and borough provided an average of approximately 2,500 new homes, which represents around 6% of each of their overall housing stocks.



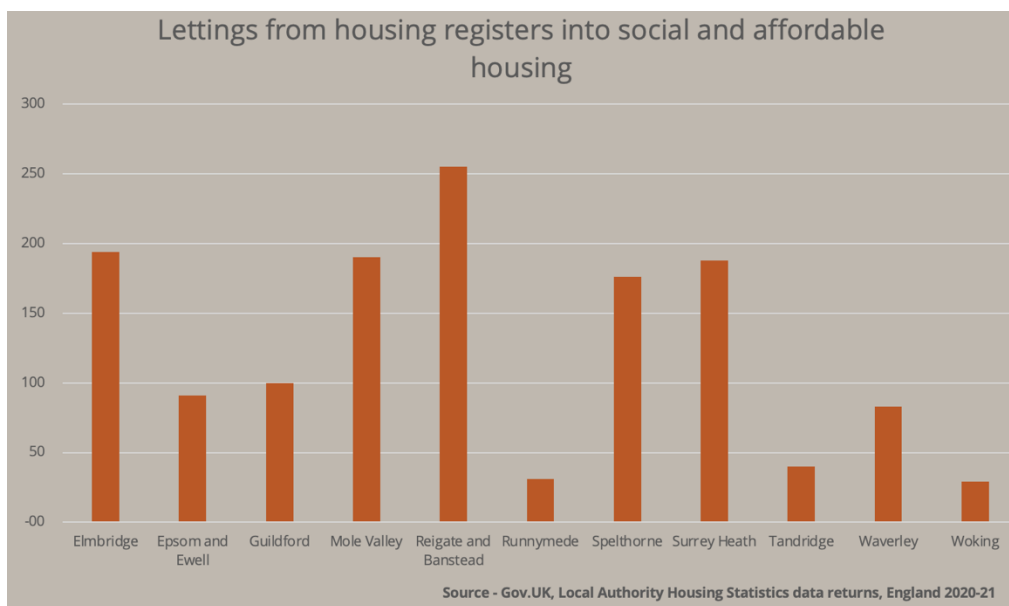
Set by central government, the Housing Delivery Test compares the targets set for delivery of new homes with actual housing numbers delivered and is a helpful way for understanding the ability of local authorities to meet local housing needs.

As of 2021, several of Surrey’s districts and boroughs are far exceeding their test in the three-year period, while others are not reaching the halfway mark. Across the county, the overall delivery rate against the government’s target reached 87%. This level of performance within a planning authority requires the preparation of an action plan setting out how that authority would respond to the shortfall and increase the rate of house building within its area.

D&Bs	Major PRP (>30%)	Major PRP Name	Proportion of overall local PRP stock owned	Proportion of PRP's portfolio in district
Epsom & Ewell	Yes	Rosebery Housing Association Limited	65%	90%
Reigate & Banstead	Yes	Raven Housing Trust Limited	64%	83%
Spelthorne	Yes	A2Dominion South Limited	86%	42%
Elmbridge	Yes	Paragon Asra Housing Limited	75%	23%
Surrey Heath	Yes	Accent Housing Limited	74%	16%
Mole Valley	Yes	Clarion Housing Association Limited	77%	3%
Guildford	No	N/A	N/A	N/A
Runnymede	No	N/A	N/A	N/A
Tandridge	No	N/A	N/A	N/A
Waverley	No	N/A	N/A	N/A
Woking	No	N/A	N/A	N/A

Source - Regulator for Social Housing, Geographic look-up tool (SDR data), 2021

In around half of Surrey's districts and boroughs, there is a single Registered Provider of social housing that owns a majority of the local stock; however, they have a varying proportion of their overall portfolio in the locality. This table sets out the relative relationships that local authorities and housing associations have across Surrey – where there is a clear potential for partnership, where the relationship is unbalanced and the local authorities without an obvious key partner for whom direct delivery or ad hoc partnerships may form the basis for stronger local housing growth.



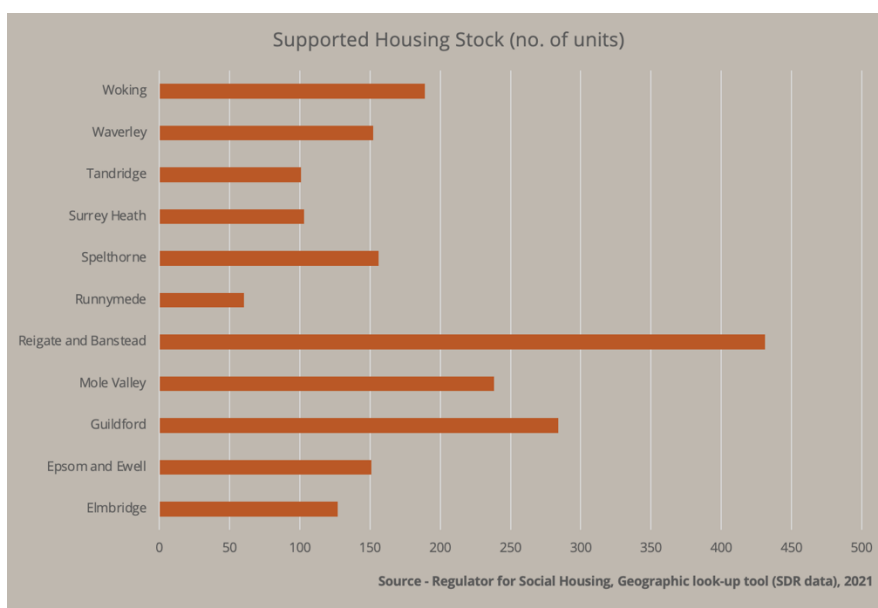
Lettings from housing registers into social and affordable housing vary widely between districts and boroughs which is largely contingent upon what stock is available in those areas.

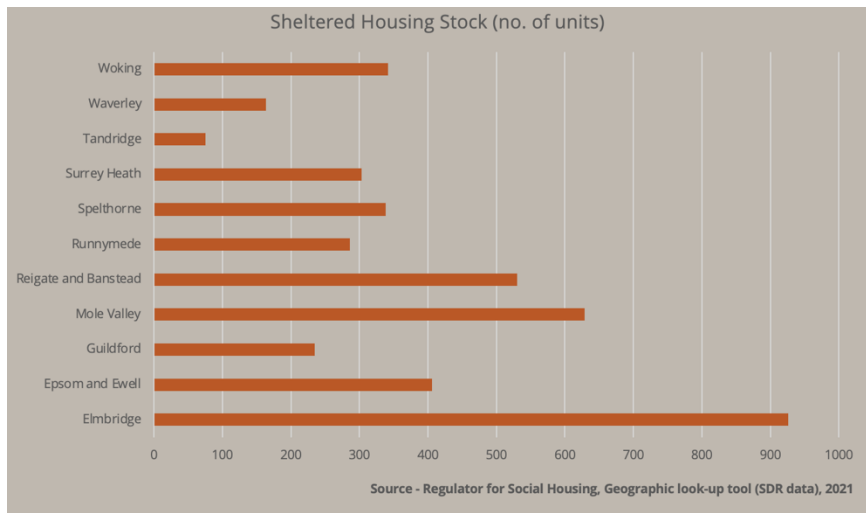
Districts & Boroughs	Extra Care Homes	Supported Independent Living – Learning Disabilities & Mental Health	Supported Independent Living – Learning Disabilities	TOTALS
Elmbridge	-	-	12	12
Epsom and Ewell	93	-	-	93
Guildford	59	-	-	59
Reigate and Banstead	53	-	16	69
Runnymede	51	-	-	51
Spelthorne	-	12	-	12
Surrey Heath	109	-	-	109
Woking	-	-	16	16
TOTALS	365	12	44	421

Additionally there are two units planned for Care Leavers:
Dorking Care Leavers – 4 beds
Epsom Car Leavers – 4 beds

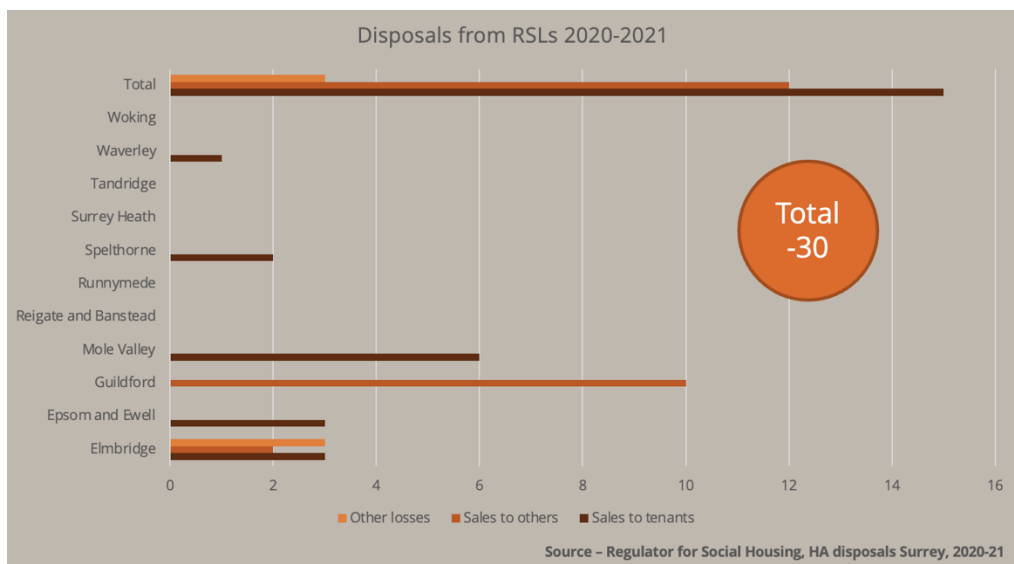
Source: Surrey County Council

The above table shows pipeline sites for Affordable Extra Care Housing (ECH) and Supported Independent Living (SIL) as part of SCC’s Accommodation with Care and Support Programme. These are subject to planning permission approval.

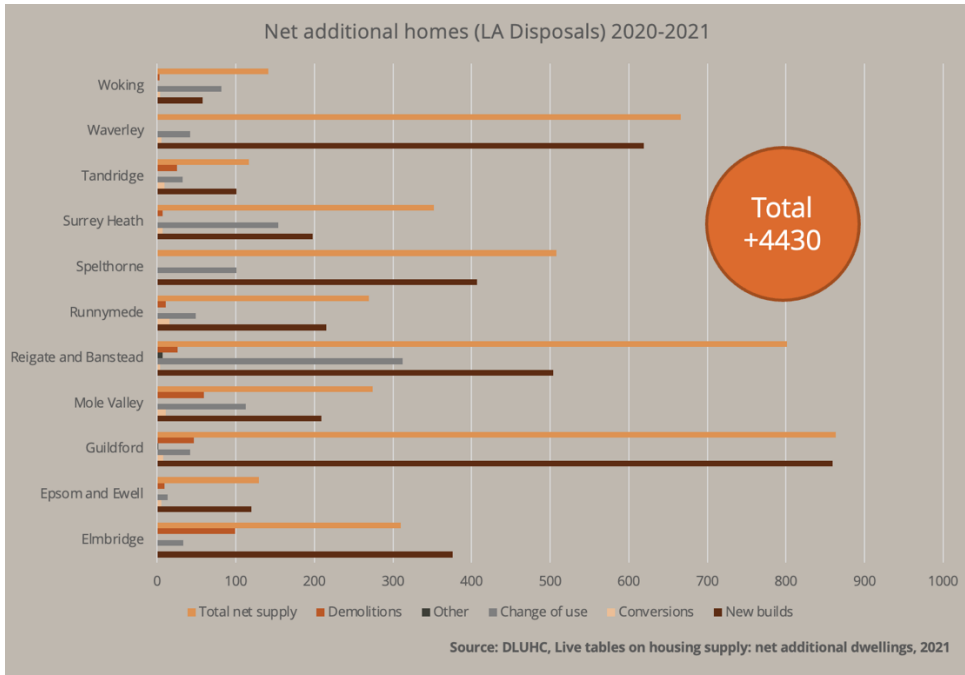




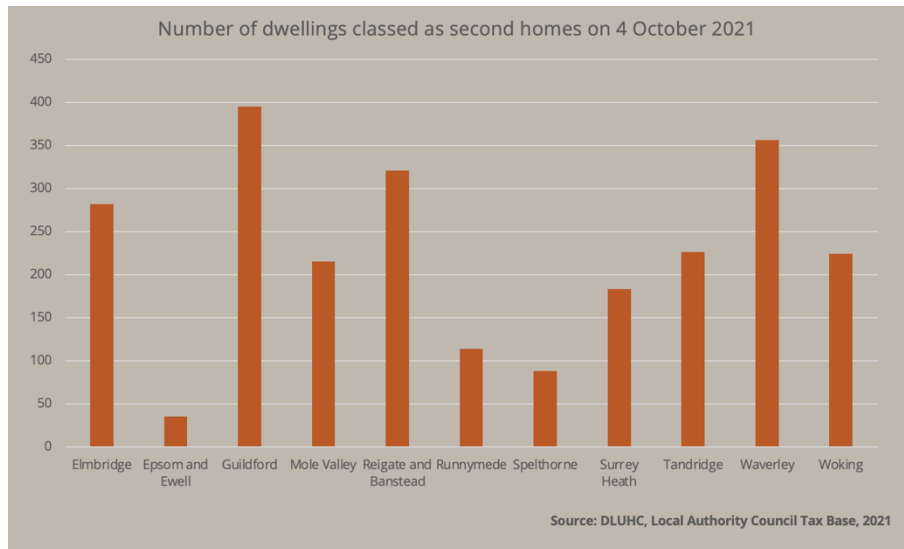
9 Surrey's stock of Supported and Sheltered housing is spread unevenly across the county, meaning older residents and those requiring assistance in their accommodation may need to travel to other districts and boroughs to find vacancies, as indicated previously by the gaps in demand. To note, Supported Housing is distinct from Supported Independent Living which Adult Social Care commissions.

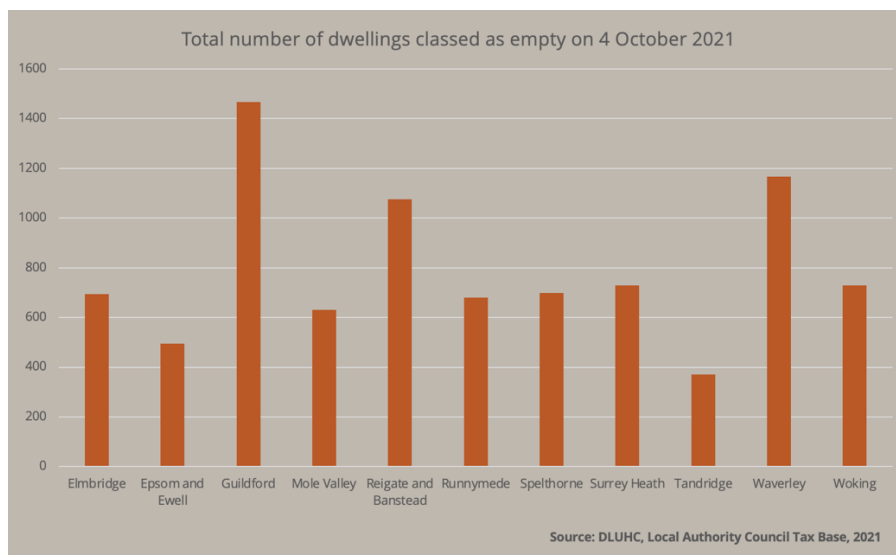


In speaking with stakeholders, there was significant concern expressed that RSLs were having to consider disposals of stock based on the cost of retrofit to new standards. On investigation, this isn't yet borne out by the data. However, it is clearly a conversation that is being had within the social housing sector, and there is an opportunity to think about how to address this issue before it becomes a serious problem.



Accounting for changes of use, conversion, demolitions and other disposals by local authorities, there was still a net 4,430 additional homes provided in Surrey between 2020-2021.





Tax base data shows that there are around 2,500 second homes in Surrey, and significantly larger numbers of entirely empty homes across the county. However, these figures are dwarfed by the overall shortfall. While there is mileage in looking at empty or second homes, it is a very limited mileage.

Policy Context

National Housing Policy is in a state of constant change. Government support for house building targets, for local intervention or support is currently subject to ongoing debate, and discussion. The coming years will see a General Election and there is a chance of further change to housing or planning policy in the run up to and after that election. Local authorities across Surrey need to be prepared for the ground to shift under their feet, and have the opportunity to work collectively, to develop a strong common cause enabling them to collectively advocate for greater power and funding from the Government over the next few years.

Recent policy documents from across the districts and boroughs of Surrey expressed shared issues surrounding housing supply, including:

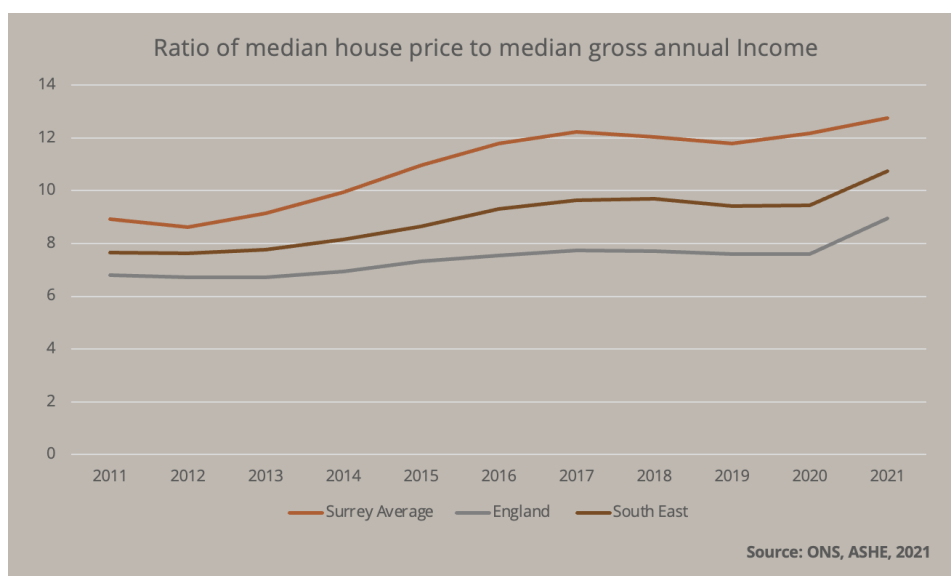
- Identified challenge in determining site locations; a need for more density overall; a focus on town centre growth (development in existing urban areas); and a need to improve accessibility/transport linkages/connections to employment areas.
- A focus on bringing forward new homes of a size & tenure to match demand reflected in housing waiting lists; specific distributions per/locality; and regional strategies shared between D&B's.
- Confirmation of overwhelming need for more affordable housing as identified in past/other policy documents and needs assessments and varied confidence in capacity to achieve housing targets. Local policies identify target figures below the latest Housing Delivery Test targets set by central government.
- The significant scale of Green Belt and conservation area/AONB and similar constraints is compounding the availability of land for development. Local

policies and designations, already varied between D&Bs, are now under further review following recent indications from central government of additional Green Belt restrictions. In current policy documents, some land with former uses (i.e., MoD) has been identified for development and some councils are looking toward larger rural sites and/or small sites.

- Promotion of development on existing/council-owned sites/already built-up areas; use of Development Planning Documents to support development of the right type and in the right location; opportunities for mixed-uses, conversion and redevelopment; and wide support for changes in use classes,
- Policy documentation identified the significance of recruiting and retaining essential workers/keyworkers (acknowledging that the definition of this is not concrete); and some housing sites have been identified with a large proportion of affordable units earmarked for keyworkers proximate to hospitals (i.e., Ashford Hospital), largely facilitated through RSLs.

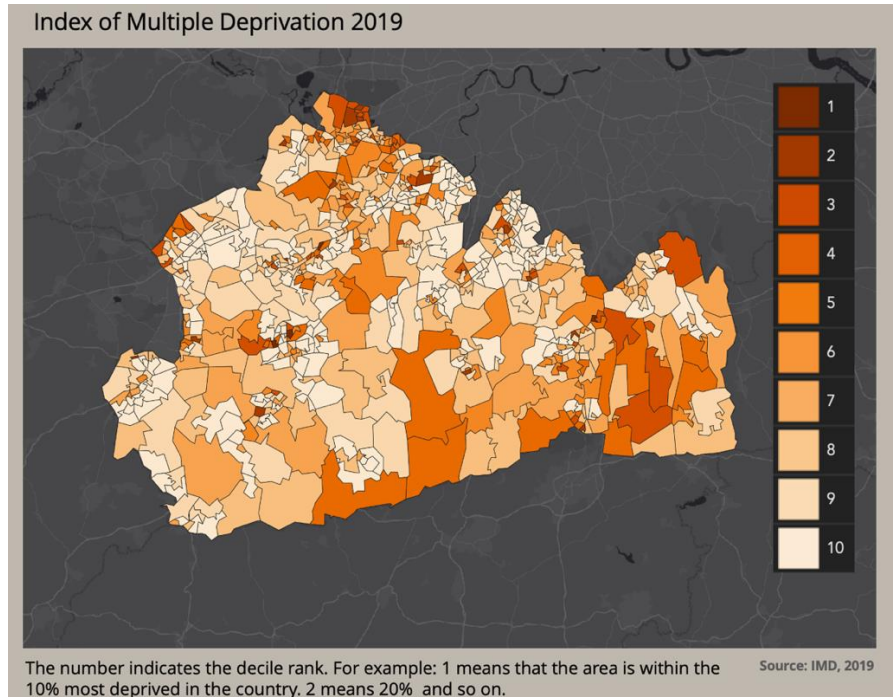
Affordability

The affordability of housing has become an increasingly significant issue across England over the last decade, however, data suggests that the problem has become particularly pertinent in Surrey with affordability figures worse than those found at a national-level and across the South-East.

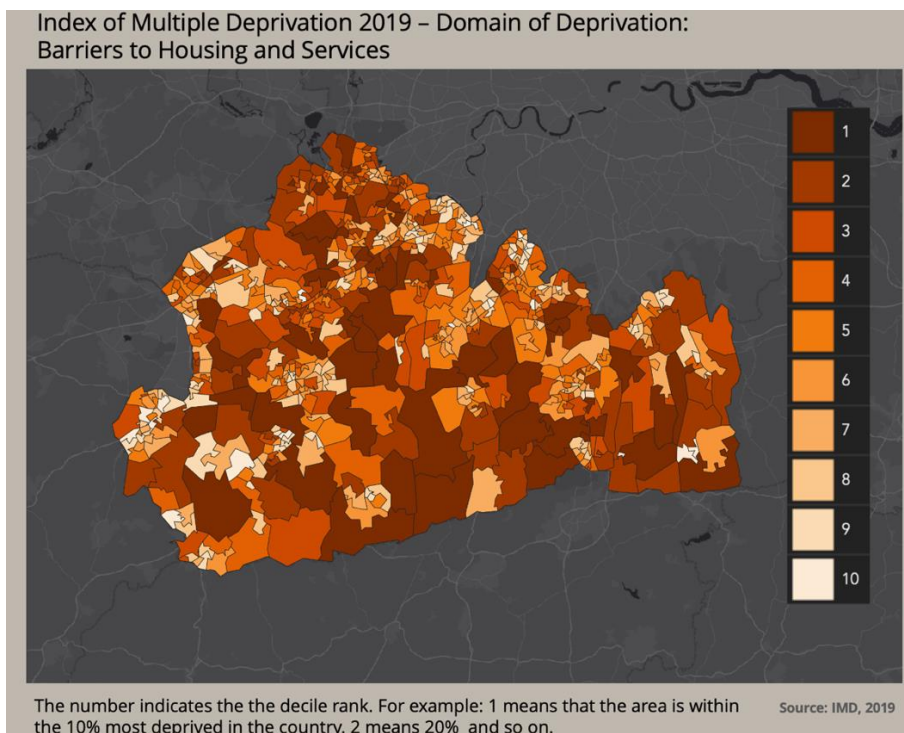


The trend of Surrey's median house prices being higher than both the national and South-East averages persist, and also in being proportionally higher than median incomes. **Surrey is not only more unaffordable for private ownership than England or the wider South-East, it has also become more unaffordable more quickly, with the ratio rising 50% since 2011, compared to 40% across the wider South-East.** The ratio of median earnings to median house prices (i.e. average earners buying average houses) is now almost 13, placing home ownership out of reach for most people. This is an average across the whole of Surrey, which

itself contains multiple housing markets – and in some wards and locations in Surrey the ratio between median earnings and median house prices will be even greater.



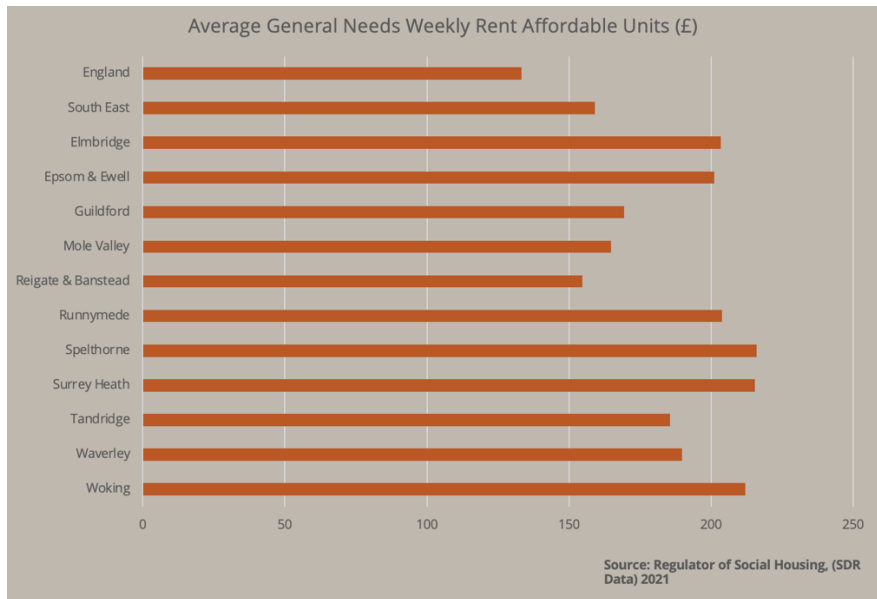
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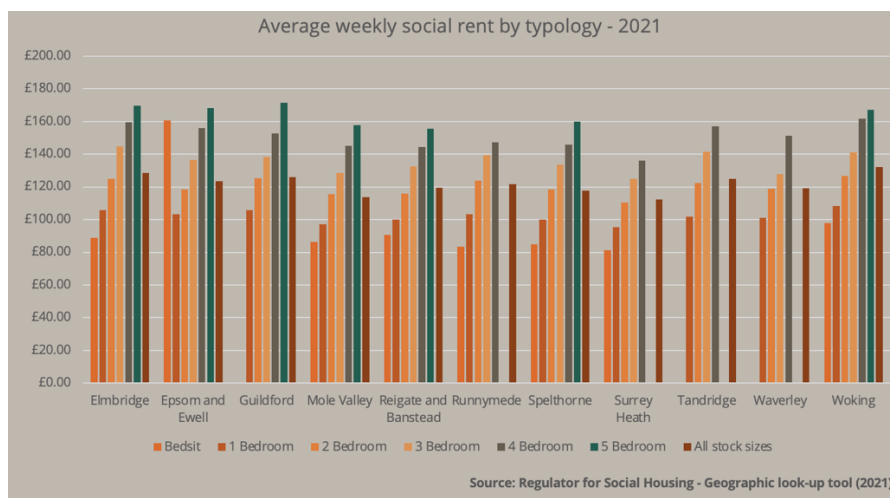
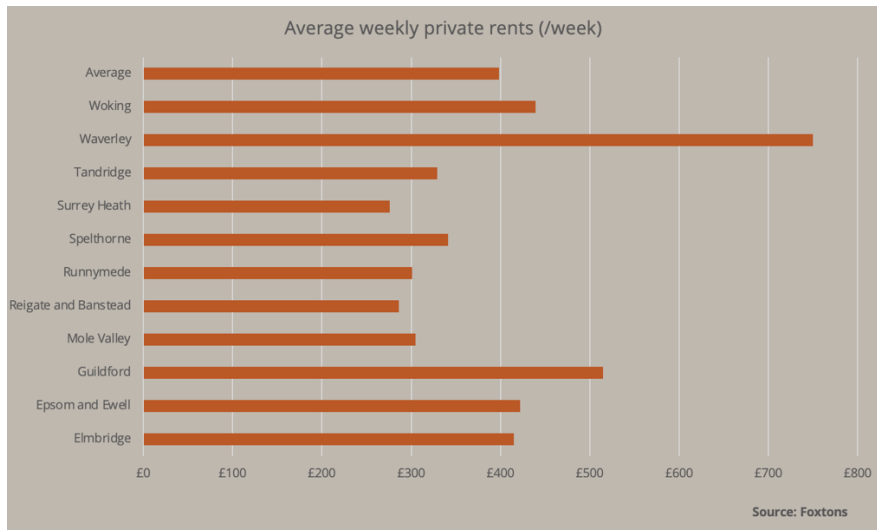
As an overview of where residents face barriers to being able to afford housing or otherwise, the 2019 Indices of Multiple Deprivation show several pockets of extreme poverty, in the top 10% most deprived areas in the county. However, the overall picture remains fairly prosperous with some of the 10% least deprived areas found in the more rural parts of the county.

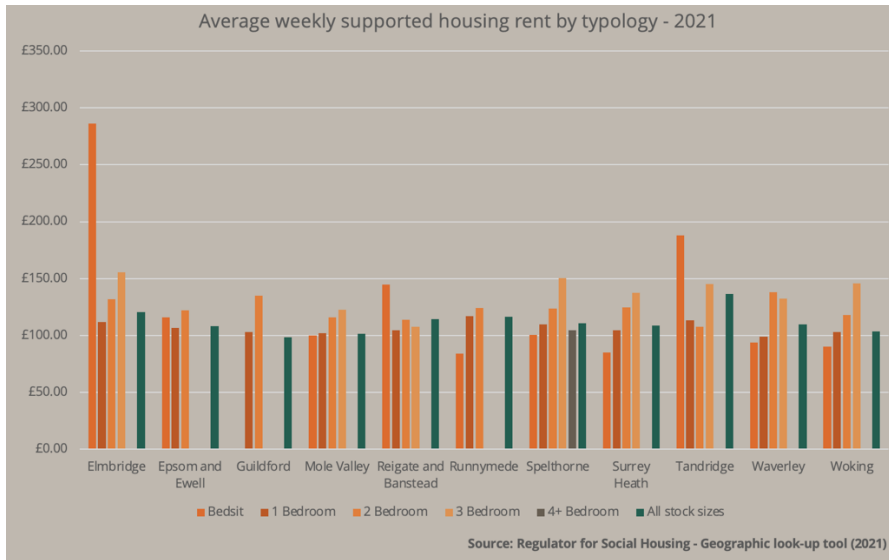
There is, indeed, a mix across Surrey, however the distinctions illustrated on the first map above express very different experiences of deprivation, and, consequently,

access to affordable housing between neighbours. As the second map shows, barriers to housing and services are a particularly constraining feature of deprivation across the county, especially away from town centres in lower density areas of the county.



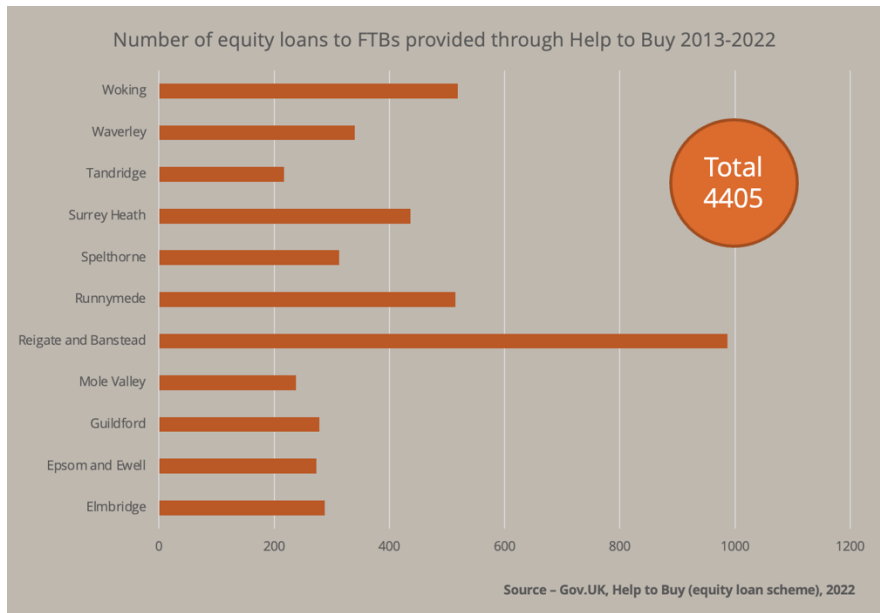
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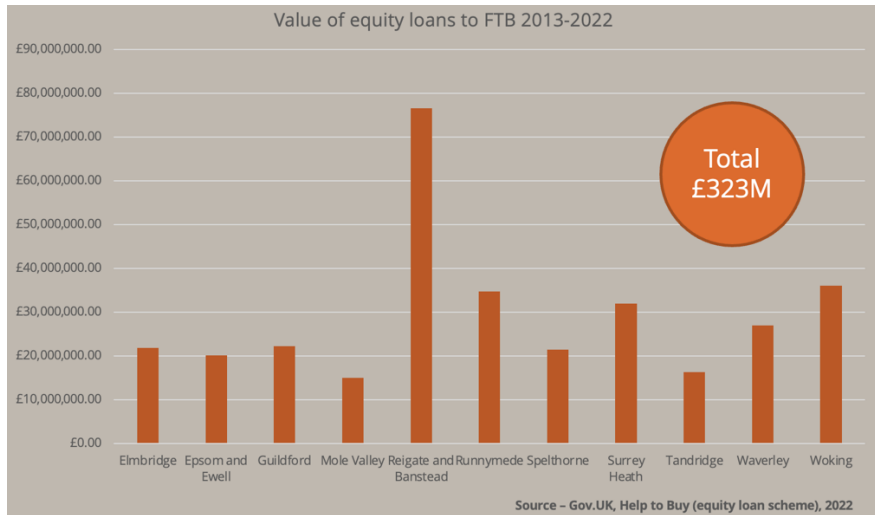




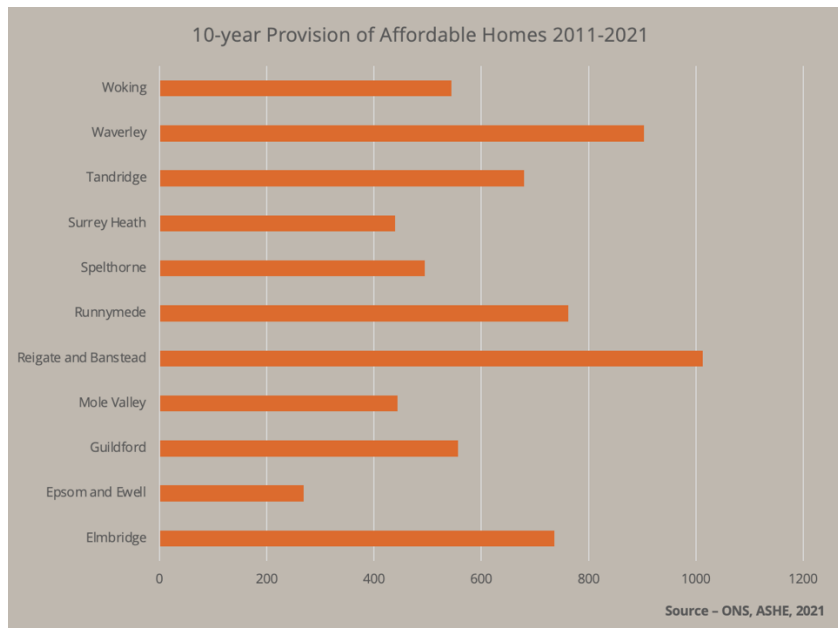
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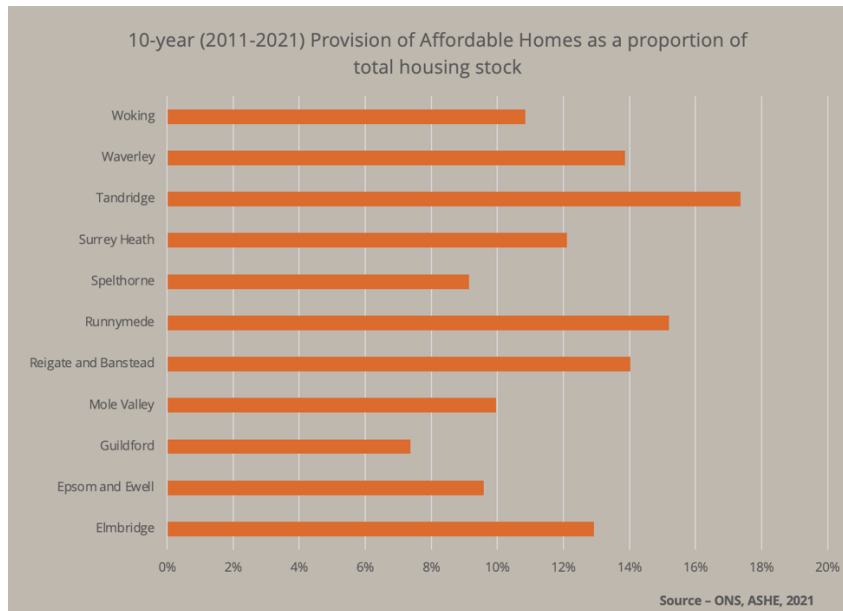
Average general needs weekly social and affordable rents across Surrey largely sit above national and south-east averages, while private rents vary more widely across the districts and boroughs. Rents by bedroom size are relatively consistent across the county, while there are several outliers by average weekly supported housing rent by bedroom size.





The number of equity loans to first time buyers provided through the Help to Buy scheme was used to measure the level and scale of support for them in the county. The data indicated that there were 4,405 loans issued from 2013 to 2022, and the value of those loans totalled £323M. Significant Government funding went into supporting the first-time buyer market in Surrey during this period.

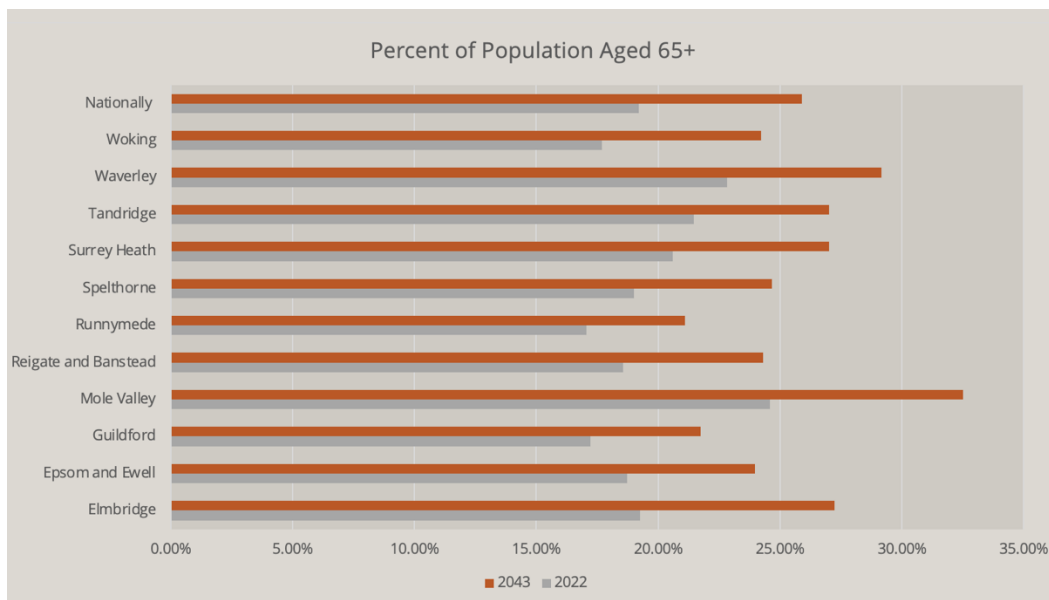


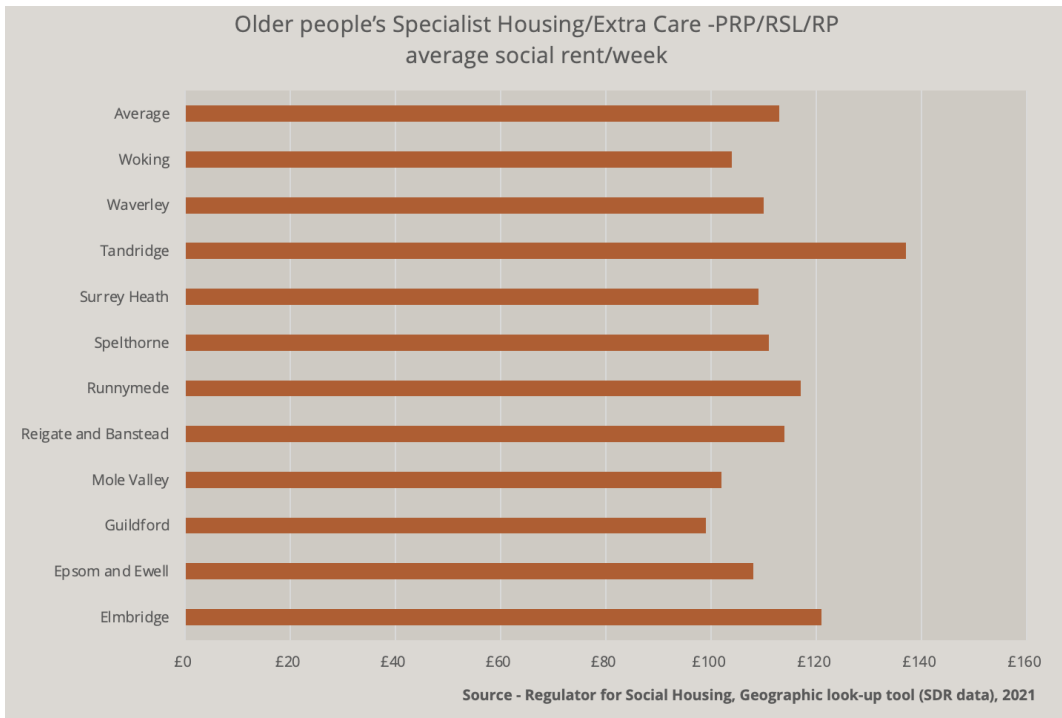


9 The provision of affordable homes from 2011 to 2021 represents approximately 12% of the overall proportion of housing stock in the county during that time, with the remaining 88% of homes built in the past decade in the county being private homes for ownership.

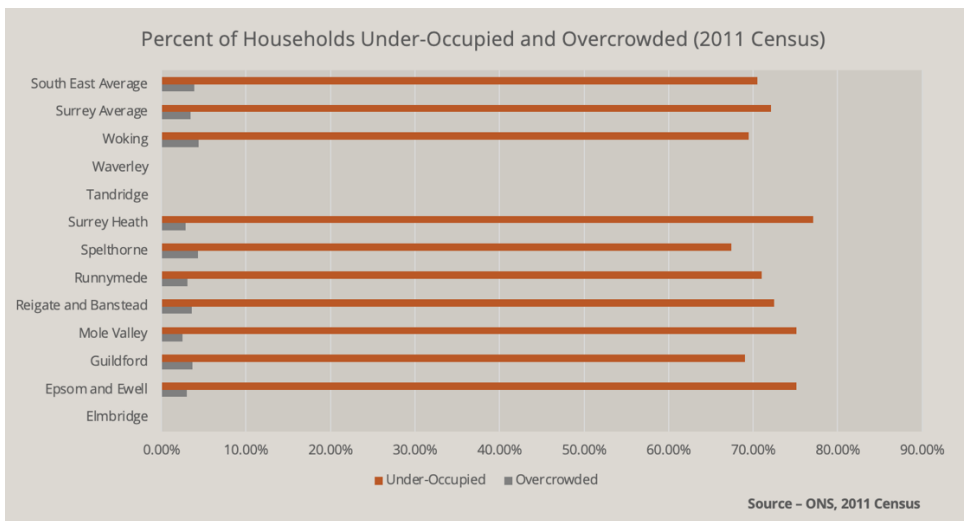
Health & Inequality

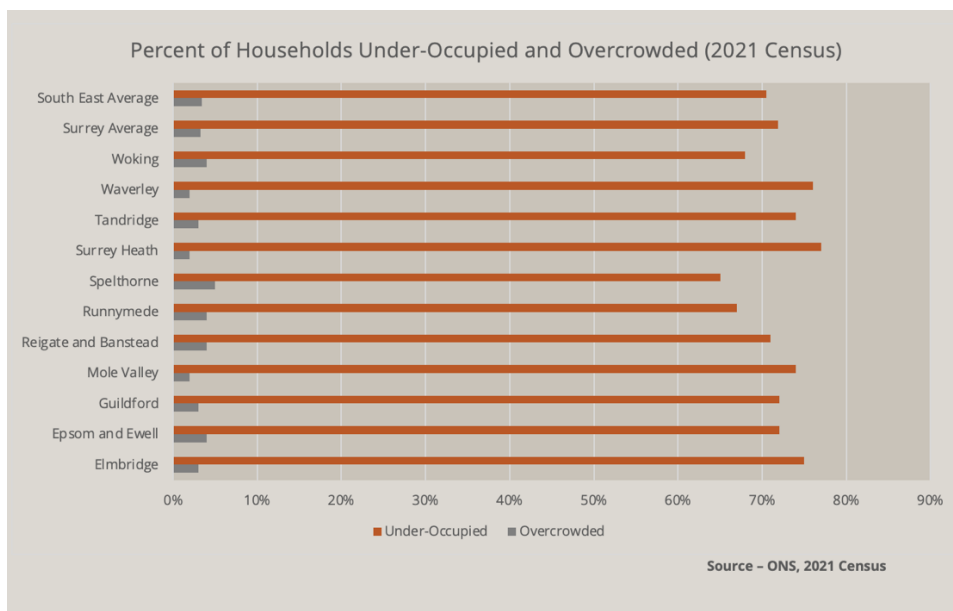
For the purposes of this strategy, it was crucial that the circumstances that can further compound the barriers to accessing affordable housing be assessed to understand the range of issues that can deepen negative impacts on the health and inequality experienced by residents.





Like the rest of England, Surrey's residents aged 65 and above is growing. Those 65+ currently comprise around 20% of the population, and that is set to increase to between 25-30% by 2043. With a further ageing population, there comes heightened demand on Specialist and Extra Care Housing. The current average rent of those kinds of housing provided by Registered Social Landlords and Registered Providers in Surrey is classified as affordable by the Regulator for Social Housing at approximately £110/week.





Many older residents are living in the homes they have lived in for most of their lives, with more bedrooms than they require, contributing to under-occupation rates of above 70% in some parts of the county. As the tables above show, there have been some reductions in under-occupation rates between the 2011 and 2021 censuses – but in all parts of the county rates remain over 60%.

Legislation is shifting such that private rental properties will also be subject to the Decent Homes Standard, but at the time of developing this strategy, only the data on homes owned by Local Authorities was available; it showing inconsistent levels of homes not meeting the standard. Note also that data was unavailable for some districts and boroughs.

In recent months the problem of damp and mould in all housing tenures has become a more prominent issue. The impact of fuel poverty, poorly insulated homes and historic disrepair in some homes has brought a much sharper focus on how many lower-income and vulnerable residents are living in unhealthy homes.

Nationally there is a shortage of trained, skilled repairs workers who are needed to maintain, repair and refurbish affordable homes in the housing sector. This is compounded by high rates of inflation in costs and labour while rents, which provide the funding for services, have been capped, frozen or cut in recent years, reducing the income and available budget for work.

A Sustainable Economy and Inward Investment

"It gives a lot of stress to people, you see it on them, the lack of housing, the lack of a decent place, where they want to be... it means they're less productive and it's worse for business in that respect too."

The relatively low level of house building in Surrey means that fewer jobs are being created in construction or within the local supply chain to support construction and

maintenance of homes. With significant national funding from Homes England available for the delivery of housing, the county is missing out on investment.

Surrey has a prosperous and successful economy. This success requires an ongoing supply of skilled, educated labour to work in established industries and to create new companies and opportunities for the future.

The very low levels of inward migration, with four times as many residents moving to comparator counties like Kent or Hampshire than to Surrey, means that the county is missing out on the economic benefit these residents could provide.

Business representatives reported that recruitment in town centres and high streets was extremely difficult, with residents unable to afford to live near to jobs or, increasingly, unable to afford the commute to work. This is putting at risk the quality and range of shops and services in Surrey's town centres.

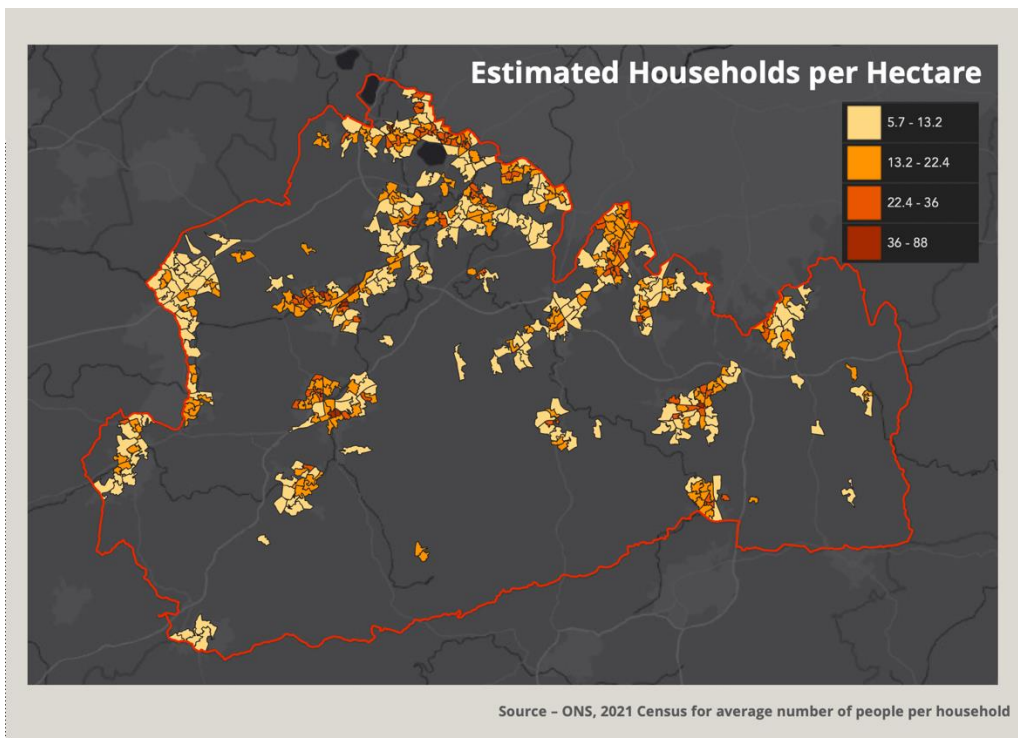
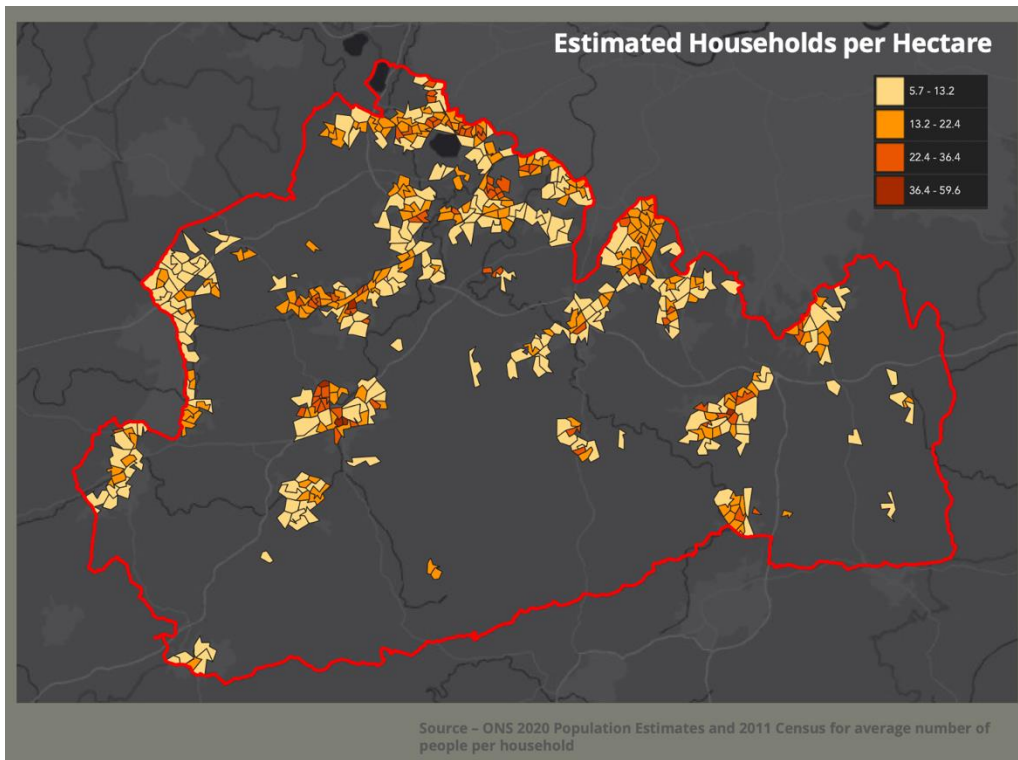
There is also difficulty in retaining keyworkers across the public sector. Within the NHS, Surrey Heartlands Health and Care Partnership conducted a survey which found that the single biggest stated reason for resignation amongst nurses was relocation elsewhere and that affordable housing was the largest factor in choosing where to work. Surrey Heartlands saw 196 nurses who had been recruited from overseas leaving over a 12 month period. At an investment of £22,000 to recruit each nurse, this cost the local NHS £4.3 million in just one year.

The unaffordability and shortage of housing, and the suburban profile of much of the county is also acting as a deterrent to international workers and graduates, who are economically productive and highly mobile.

"We made a very senior job offer recently, and on a good salary, and [they] had a look round here and decided it wasn't worth moving."

Climate Crisis & 20-Minute Neighbourhoods

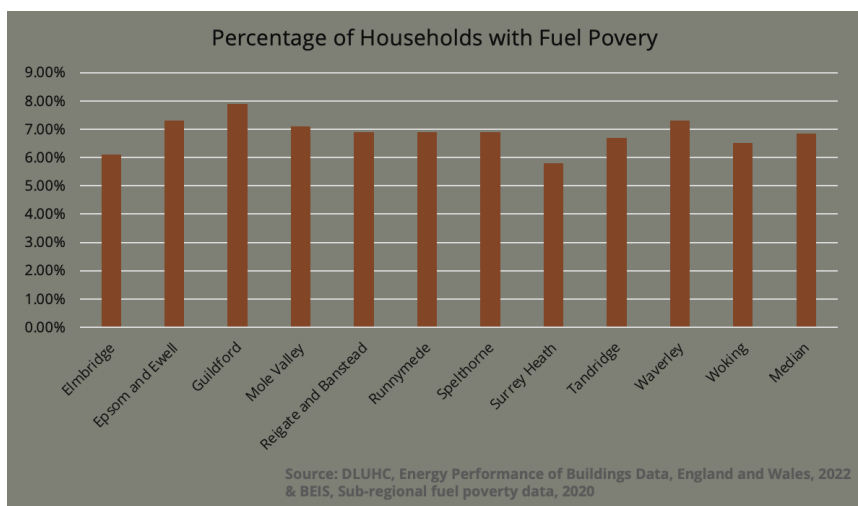
The emissions from Housing are a major contributor to climate change but is not yet seeing the scale of transformation that is already starting to occur in transport-related emissions through the introduction of improved engine designs and new hybrid and fully electric vehicles. The local authorities in Surrey have declared climate emergencies and have committed to reaching net zero in the coming decades, albeit to different timescales. Each district and borough has its own climate action plan or carbon-reduction policies contained within other planning documents. To understand the county's preparedness to reach these ambitions, a consideration of the density of housing in the county, the energy efficiency of buildings, the potential of retrofit, and the number of households experiencing fuel poverty is necessary.



In the case of the former, aside from a few pockets of concentrated households near town centres, there is little density across the county to contribute to an ambition of 20-minute-neighbourhoods and their associated benefits. Research by the Town and Country Planning Association has pointed to densities of 70 dwellings per hectare (dpa) as being needed to deliver the sort of density required for a 20-minute neighbourhood. Data from across Surrey shows that nowhere in the county meets this threshold, with the highest density Lower Super Output Area, in central Woking, reaching 59.6 households per hectare.

This means that not only are residents faced with longer journeys to access services, shops and employment opportunities, but that they are also having to spend a larger share of their income on car journeys or having to rely on public transport, which can be expensive and unreliable.

The energy performance of buildings as assessed by the Department of Business, Energy and Industrial Strategy mirrors the national average with an average EPC rating, for homes that have been assessed, of D. This indicates the potential scale of work to be completed to improve and retrofit homes in Surrey to meet higher standards of insulation and efficiency.



Those experiencing fuel poverty comprise nearly 7% of households in Surrey, however this data was captured before recent energy price increases and is therefore the rate is expected to be higher than this shows. Some estimates are now suggesting that if these price increases are sustained, it will put almost half of households in fuel poverty in 2023. Surrey County Council has prepared an action plan to support residents through this winter with Warm Hubs and other interventions.

Priority Strategic County-Wide Themes

The data is very clear that there is a serious housing crisis in Surrey, and that it affects all tenures and all levels of income (even where this may be less obvious to some residents). Conversations with over 30 stakeholders, together with the data, pointed to the following as priority themes and issues for action:

The Importance of Partnership Working

... Shared solutions to shared problems

Partners across the county have been clear about their desire for greater partnership working in Surrey, and frustration at the unrealised potential in the face of high demand and need. There was evidence of some good work already undertaken by the Districts and Boroughs in collaborating with partners and encouragement of step-down options, but the overwhelming response was that more could be done.

This was brought home strongly with the praise for the effective partnership between district and borough councils and Surrey County Council Public Health, during the pandemic and in the provision of emergency accommodation for very vulnerable adults between 2020 and 2022. There was also a lot of positivity around work between local authorities on refugee and asylum provision and the partnership approach to working with highly vulnerable families being delivered through the family support teams.

However, many participants pointed to the need for stronger partnership working between key players across the county, in relation to the provision of housing and accommodation, which was less than the sum of its parts. Despite multiple forums for discussion, the scale of opportunity for partnership working was not yet being realised.

A question we heard asked in different ways by a wide range of participants was “How is the case for investment in housing in Surrey being made? And by whom?”

There are multiple and, sometimes, competing agendas and priorities around housing and accommodation in Surrey and there is a clear opportunity for a more joined up and strategic approach to attracting further investment in all types.

In this research we have seen significant amounts of common ground in policy aspiration and in the challenges faced. Partners are facing similar, if not the identical, issues with the same funding constraints and the same pressures. With widespread alignment on policy responses, there is a strong foundation for a partnership approach across Surrey that would be more than the sum of its parts.

Understanding Public Opinion

The conventional wisdom that was heard repeatedly in this study is that there is not support from within Surrey for more housing. Whilst everyone recognised the need for more homes and expressed a desire for that need to be met, we heard that the case for more homes wasn't being made for fear of falling on the (perceived) wrong side of public opinion. Given this, it is important for partners to work together on the development of a shared narrative about how the right additional housing in the right places can protect and enhance the quality of life that local residents prize so strongly and enable their children and grandchildren, as they grow up, to have the opportunity to also make the local area their home.

While housing is a key issue in local elections, residents are also voting on a wider range of local and national issues. Anxiety about public opinion regarding growth and development can be a barrier to partners confidently committing to long-term joint working on housing growth. There is no clear evidence at the current time, however, about the level of understanding or the state of local opinion in Surrey about the scale of the housing crisis or the desire to act to resolve it. This is something public sector partners have a responsibility in addressing, ensuring that local people understand the wider detrimental consequences of a no-growth strategy, and the significant benefits that can be secured through appropriate levels of housing growth in the right places.

An Ageing Population & Under Occupation

... Building for a resilient population

The data clearly indicates an issue of under-occupation in Surrey which is exacerbating the housing supply problems and reducing the stock available to house families; again reflective of the regional picture for the South-East.

Through the consultation undertaken, this is felt to be attributable, at least in part, to the gap in provision of appropriate specialist/extra care/supported housing units that would enable older residents to move into more suitable accommodation for their long-term needs.

This anecdotal evidence is supported by the data on ageing population for Surrey which indicates considerable growth. This is not unique to Surrey (and reflects the national picture) but clearly demonstrates pockets of particular growth in older residents within the county and a rate of growth exceeding the national picture in some areas. For example, ONS estimates indicate that a third of Mole Valley's population will be over 65 by 2043. An older population will be more dependent on health care and social care services, requiring a larger working-age population to be able to live in Surrey and deliver these essential services. Further, the suburban form of much of Surrey, coupled with under-provision of public transport connections, places additional financial burden on those care workers who are required to travel between clients living in their own homes.

It is recognised, however, that this issue is not just one about having the right housing stock but also the right practical support, advice and incentives in place to encourage a move out of the family home and into sustainable, suitable accommodation.

Housing [Un]affordability

Despite the median income levels for the county being higher than the national or regional levels, the house price affordability ratio across the county is also higher than comparator areas and has accelerated by more than the wider south-east, suggesting an issue across the board but a particular concern for those earning under the median wage.

Consultation responses suggest this is impacting on filling job roles across a range of sectors, from essential workers to senior level managerial roles. This is supported by the data suggesting the lowest level of in-migration to the county across all its comparator areas (and net population loss in some parts).

Whilst efforts to deliver affordable housing across the county are demonstrable and ongoing; the percentage of the overall stock of the county remains low and far below the supply required to meet demand. The majority of affordable rented housing over the past decade has been at Affordable Rent rather than Social Rent, placing this tenure out of reach of many families subject to benefit caps. Private home ownership is particularly high in the county, a historic feature of Surrey but one that is now contributing the lack of supply of affordable housing.

Affordability is, without doubt, a growing national issue but the data and consultation suggests that the situation is particularly pronounced in Surrey, making it a less feasible option for growing families, young graduates or young professionals to continue to afford to live within the county, or for workers with the skills and qualifications the economy needs, or for households to move to the county and/or businesses to locate here.

Supporting Vulnerable Residents

While there was considerable praise for the effective 'partnership in a crisis' approach taken by councils during COVID, there was a wider feeling that a system under considerable strain is often marked by fragmentation, with individual services understandably retreating back to a focus on their core statutory responsibilities, anxious about protecting limited budgetary resource and therefore pushed into working in a siloed way.

... Responding to new burdens

This was brought into sharp focus by the number of additional burdens that Districts and Boroughs are taking on in response to a large number of Refugees and Asylum Seekers. A large number of Surrey residents have opened their homes to Ukrainian refugees, with communities across the county going out of their way to welcome refugees. As the war enters its second year many Ukrainian families are confronting the possibility that they may not be able to return home for years, if at all. These families are putting down roots, making friends, settling into school, work and community life – but still mostly dependent on spare rooms.

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As placements break down or come to an end, it's the responsibility of local Districts & Boroughs to find alternative accommodation in a housing market that is already expensive and unable to meet extant need. In some cases, Surrey's D&Bs find themselves in competition when it comes to securing Private Rented Accommodation with organisations working on behalf of the Home Office to find homes for Asylum Seekers, who will then hold a local connection to the area if their claim for Asylum is approved by the Home Office.

... Overstretched and fragmented systems

There was particular frustration expressed that "housing is picking up the slack" from a lack of funding or provision for high-needs families or individuals and that problems were being passed around, rather than being resolved in partnership.

This was the one area where it felt that a shared sense of purpose or common endeavour would bring potential partners together out of their siloes. The fraught and pressured environment, that many of the professionals we spoke to operate in, means that there's limited space or time to address these questions with a strategic long-term view: "Every day is crisis management now".

... People-centred services

Given the rate of housebuilding, the cost-of-living crisis and the extant levels of need, there is an important question about how multiple agencies and organisations, all acting within constrained budgets and resource, can work better together to maximise what they have for the benefit of residents who need that support, and whether current structures are an insurmountable barrier to progress.

Public Sector Land

From across the county, we heard the same response about land. First, that most councils who are seeking to develop don't have much, if any. Second, that there was a feeling that the County Council didn't have a process for working with Districts and Boroughs on identifying land within their boundaries that could be developable in the medium and longer term beyond the Call for Sites in the Local Plan process.

From within SCC, we heard that the process for identifying land as obsolete was best described as 'iterative', with service areas effectively able to put a hold on land that 'might be needed' in the future. When land was identified as suitable for disposal the County's policy, after 12 years of austerity, has been to seek the best return on the land for the public finances. Going forward all partners need to consider how they can factor in public value rather than just short-term commercial financial return, into decisions about how surplus sites are disposed of. Taking such an approach will probably still deliver positive commercial outcomes for the public purse (for example temporary accommodation costs), but over a longer period,

... Collective action

There is serious appetite from local authorities and RSLs to bring forward land in the public interest, but they are not able to compete with the open market on price.

Stakeholders who work within Surrey and elsewhere across the country described the situation in Surrey as 'unusual' in not having a well-developed partnership around public land held by all local authorities and public sector partners.

We see significant alignment in policy aspirations and strategic ambition around housing from all partners in Surrey, and the potential for a collaborative approach to assets to deliver this agenda.

... Taking greater control over quality, quantity & price of homes

A genuine partnership approach to public sector land would look at demand and need on a wider basis, taking into account delivery capacity, scale and a range of sites. Partners would need to be prepared to pool resource for shared benefits, recognising that greater scale will attract resource into the county with the potential for partners to collectively exert greater proactive control over the type, scale, size and affordability of housing being delivered in their local area.

More Councils, Building More

From all sectors in Surrey there are outstanding examples of work being undertaken to deliver more homes, of all tenures, meeting a wide range of need and demand in the county.

Several councils have more than exceeded the tests set by the Government and were praised by external organisations for having “grasped the nettle” on town centre regeneration and brownfield land.

... Not being developer-dependent

Spelthorne Council has set up Knowle Green Estates, a wholly owned council delivery company, which has already delivered a range of affordable homes in Spelthorne.

Elsewhere, effective partnerships are being put in place between RSLs and Housing Associations, as with Raven and Reigate & Banstead Council, with a real focus on delivering more genuinely affordable homes.

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However, there is also significant risk to capacity across the county.

First, changes in housing associations over recent years have seen many local HAs absorbed into larger national organisations, who some participants felt weren't sufficiently focused on Surrey. Indeed, given the very high land values in Surrey, in the absence of strong partnerships helping to bring forward new developments, housing associations will simply face the choice of making their investment funds go further by building in neighbouring regions instead.

Second, many participants felt that councils who no longer held stock were concerned about “the sheer administrative burden for a relatively small organisation of getting back into housing: the time, the money, the resource” which could lead to ‘delivery deserts’ if a siloed approach is pursued.

Third, we heard again and again about the challenges of estate regeneration, particularly for older people's bedsits from the 1960s and 1970s, given the rules that Homes England operates within to not fund replacement units.

The Climate Crisis

The response to the climate crisis in this study fell into one of two related areas:

- 1) Changing investment priorities away from new housing development and into retrofit and refurbishment of existing homes.
- 2) Anxiety over climate-based resistance to new homes and new housing.

Priorities for stock-holding bodies, whether councils or housing associations have changed. There is significantly more focus on improving existing stock where possible, and a growing conversation about consolidating stock where that isn't financially possible, with some planning to dispose of existing social and affordable homes where it isn't economical for them, within existing budgets and grant regimes, to bring them to the required environmental standard.

Rising fuel costs and fuel poverty means that retrofit has an important role to play in improving the quality of homes in the county. Work is already being carried out at a county level to promote and fund retrofit, and there is potential for greater co-ordination and shared learning between partners.

There was concern that the Climate Crisis would become a focal point for opposition to new homes, without a compelling case from the outset about the long-term social, economic and climate benefits that additional housing will bring to Surrey and its existing population.

20-Minute Neighbourhoods

Several participants pointed to densification in central Woking as a '5-minute neighbourhood' in the making, but questioned what this would mean elsewhere in existing low-density suburbs across much of the county, and whether there was a plan for testing and delivering the concept in practice.

Surrey's Adult Social Care services have identified the real opportunity provided through the 20-minute neighbourhood concept of being able to provide older, vulnerable and disabled residents with access to services within close proximity of their homes and potentially providing a more attractive downsizing option for those currently living in large family homes some distance from shops, transport and services.

... Low density, highly connected

Others pointed to a lack of appetite for density in a county where the prevailing form of development is detached or semi-detached housing on the edge of existing settlements. In these cases, the risk emerges of traffic-dependent development. Examples from elsewhere where 20-minute principles have been retrofitted into existing low-density towns or villages have focused on transport connections, particularly for cycling and walking, to make it easier to connect people to shops and services without relying on parking provision.

A Call to Government

... Correcting the record: what Surrey needs from the Government

Surrey's reputation and brand is as a place of prosperity. The Sunday Times recently published an article referring to Elmbridge as "the leisure and pleasure borough". One participant in the study said that Surrey marketed itself as "a sort of south-east Shangri-La". The received wisdom is that Surrey is prosperous, healthy and successful – and this is true for a significant portion of the local population.

Yet that good quality of life, which has attracted people to Surrey for generations, is under threat. As the Baseline Assessment shows, there is a lack of suitable, affordable housing, combined with hundreds of homeless Surrey families in Temporary Accommodation, thousands of Surrey residents on housing waiting lists, and many thousands of potential Surrey families who have moved and settled elsewhere in the south-east of England because Surrey no longer offers the quality of life they to which they aspire.

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Responding to this challenge rests first and foremost in the hands of Surrey's decision makers in the Town Halls and Civic Centres across the county. There are, however, structural issues that make those decisions more difficult, placing barriers in the way of local councils being able to act in the best interests of their communities. Part of this work has been to bring partners together to discuss what needs to change in national policy to help address the housing crisis in Surrey.

... Greater power to speed up development

A great deal of frustration was expressed at the slow pace at which planning permissions are 'built out' by developers. The slow pace of development, particularly across larger lower-density sites where homes are completed and sold-off, was cited as driving scepticism among residents about the need for further planning permissions when others remained incomplete. There are many reasons why sites with planning permission may be built out slowly which are beyond the control of developers: supply of labour or materials, or economic conditions, for example. The lack of means for councils to compel developers to build homes or to be able to use the track record of developers in building out previous planning permissions as a material consideration in planning applications (to help distinguish between those applicants seeking to establish land value and those seeking to build homes)

...More certainty and consistency in the planning system

Regular reviews of the planning system by the Government has led to Local Plans being withdrawn or paused, including several within the County, leading to the delay in the delivery of potentially thousands of much needed new homes. More certainty and consistency in the planning system is will enable councils to move forward with confidence in developing and delivering their plans.

... Funding for social rent

It was widely acknowledged that there is insufficient funding for affordable housing in Surrey. Most of the funding for affordable housing over the past decade has gone on investing in Help to Buy or in Affordable Rent, and while this has helped a significant number of local residents to secure a home, it has failed to address the housing needs of local families who need a Socially Rented home. The average rent for an Affordable Rent home in parts of Surrey is now more than the average weekly earnings for a woman working part-time in the County of £222.

To meet local need, Surrey needs more grant funding for Social Rent, at scale, and at a level that makes it viable as part of all types of residential development in the County,

... Funding for regeneration

"Our sheltered housing isn't desirable, but we can't afford to redevelop so we've expanded the age range... but now it's multigenerational... 55-year-olds and 105-year-olds.... it wasn't designed for that."

Government rules mean that grant funding from Homes England is restricted to funding net additional homes. This means that replacement of small bedsits with family-sized homes doesn't attract grant funding, and the rebuilding of poor-quality housing estates to deliver better quality homes for existing tenants, as well as an uplift of housing on existing housing land, is more difficult. As a result, Greenfield development is often more financially viable, despite being less supported by many communities.

The Government must change grant funding rules to, in the first instance, require an uplift in floorspace, rather than units, or to provide funding for replacement homes, where this leads to the provision of better-quality and lower carbon-emitting homes. This would help unlock brownfield and town centre sites where landowners, including councils, cannot make the finances work to rebuild or redevelop land to provide much needed housing. This would not require an increase in available funding, just in the rules about which homes are eligible for funding.

... Greater Power over Land Assembly

Local councils know their local areas well and have strong regeneration ambitions. These are sometimes frustrated by a lack of power over land assembly and a slow and expensive compulsory purchase system. Where councils have ambitions to build more genuinely affordable housing, or homes for First Time Buyers, they may be blocked by existing landowners who want to sell to the highest bidder (who may then deliver fewer affordable homes or dedicated homes for First Time Buyers).

... Structure of Government funding

Again and again, service providers stressed their frustration with the structure of government funding. Small pots of money, available over short periods of time, each provided in a way designed to elicit results that could be announced as a success. This creates a focus on short term planning, rather than looking to invest in long-term approaches, which would create better outcomes and better value for the public.

... *Funding for bus travel*

Surrey is a low-density county. With the cost of fuel, private car ownership is increasingly out of reach of lower income families. Bus travel is the only viable way to link homes on the edges of communities to local services or employment. In some cases, partners reported reluctance for some clients to accept homes in more rural settings because of the isolation, even if they were affordable.

... *Funding for Retrofit*

"You can't spend the same pound twice, if we spend it on retrofit then we can't spend it on a new home"

The cost of bringing homes up to environmentally sound standards is significant. For Housing Associations and stock-owning local authorities this represents a serious challenge to budgets and means less money will be spent on building new homes for local families as budgets are squeezed. The need to meet higher EPC standards also means that some councils and RPs with available funding are choosing not to buy more homes to meet local need, because the cost is prohibitive at a time when they are already committing to investment in their existing stock.

Furthermore, and more concerningly, some Housing Associations are actively planning to dispose of existing social rent homes on the private market, because the cost of retrofit is too high. This is not yet showing up in the data from the Regulator of Social Housing, but it is a significant issue which is looming on the horizon for Surrey, which already has fewer Social and Affordable homes than comparator areas. Identifying this issue before it becomes a serious problem, with a chance to prevent it, is a golden opportunity.

The government must provide additional funding for retrofit and refurbishment of existing social homes, or to bring newly acquired homes up to standard. In the absence of additional funding, and in the ongoing absence of regeneration funding to replace poor-quality homes, exemptions or extensions to meeting stricter EPC standards should be provided for newly acquired stock or for existing social housing where the cost to retrofit or refurbish is not viable under current grant schemes. In the short-to-medium term this would provide stock-holding authorities with the certainty that they were not acquiring significant liabilities in pursuit of meeting their social aims and values.

"We will keep investing in new supply, but money is being pulled into existing stock, into retrofit, and having to cover the cost of replacement... so there'll be fewer affordable homes built as a percentage of new supply."

A Call to Action

... Partnership: treat a crisis like a crisis.

"We can't just carry on as we have been and doing it all ourselves"

Surrey has a housing crisis but this isn't universally recognised. At the sharp end of the spectrum the crisis has been so long-running that it has become Business as Usual. The effect of the Housing Crisis in Surrey is now much broader, affecting a wide range of public services and the private sector economy, even when not recognised as such.

When faced with other crises, especially during the COVID pandemic, partners have pulled together with a sense of common purpose and determination. This approach needs to be taken with housing, recognising it for the crisis it is and applying the same pace and determination as in COVID.

"We all worked so well together in COVID, we're good in a crisis, and this is a crisis"

... Sharing best practice

Across the County there are numerous examples of best practice, whether on building new homes, working in partnership with housing associations, investing in retrofit of homes, there is good work being done. This work is being shared by exception, with participants in workshops often not aware of what else was happening across the county. Existing partnerships were often based on individuals knowing each other – but despite numerous forums for partnership, there wasn't an approach to sharing and celebrating success and innovation.

The workshops that were held as part of this strategy brought people together, in some cases for the first time, sparking conversations about joint work, sharing ideas and building a community of practice. Space should be given to continue the opportunities for partners from a broad cross section to come together to discuss and address common issues on a more regular basis.

... What do older people really want: multigenerational, housing typology, access to services

While there is a shortage of all kinds of housing in Surrey there is a very visible failure to provide for older people. This is seen in the very high levels of under occupation. Whatever is being built for older people in Surrey isn't of the type, scale or location to attract older people, living in Surrey, to downsize and move in.

A wider range of housing that would be more attractive to older people, including co-housing and multigenerational developments should be brought forward, particularly in town centres where older people would have walkable access to shops and services. Older people are more likely than the wider population to use in-person shops and services, rather than using online services (a fact that will likely change

over time) and so proximity to town centres will help both with reducing isolation and provide support for local high streets.

CASE STUDY – Multigenerational Development, Nursing Home and Student Accommodation – Netherlands

To increase community connection between older and younger groups, a Dutch programme provides free rent to university students in exchange for 30 hours a month of their time engaging with the residents of a neighbouring nursing home. In this programme, students teach the older residents new skills such as using email, social media and art lessons, as well as reading literature and poetry which has been shown to make those with dementia more comfortable. The research behind this shows that it reduces loneliness and social isolation while improving wellbeing and extending the life expectancy of the older people participating.

... *Support for downsizing*

Surrey has very high levels of under occupation: couples or single adults living alone in large family-sized housing. In many cases this is a home that these people have lived in for a very long time and downsizing to a smaller home, that better meets their needs, is not a simple or easy decision. This is made more difficult with a lack of information about housing options and support with moving.

Raven Housing Trust built a dedicated scheme for downsizers based on the Housing our Ageing Population Panel for Innovation (HAPPI) report from 2009, which has reported success in supporting older residents to move to homes that better meet their needs. Models such as these should be rolled out, or shared, across the county to provide a single front door for older people looking for advice and support on housing options.

CASE STUDY - ExtraCare Charitable Trust Scheme – Stoke Gifford, Bristol

Research shows that not only does the under occupation of larger homes restrict private and social housing supply for households who could use extra bedrooms, but older people staying in unsuitable accommodation can contribute to poor mental and physical wellbeing. That said, the barriers for older residents moving include the costs of relocation, a shortage of properties meeting needs, and the stress of uprooting from familiar settings. To address these challenges, ExtraCare Charitable Trust is developing a 261-home village that links housing, health and social care, and includes leasehold sale, affordable rent and share ownership units. The facilities are designed with community in mind, and include assistive technologies to help assess when health and social needs change the services required for residents.

... *Homeshare schemes for key partners, a co-ordinated approach.*

High levels of under-occupation also offer the opportunity for a greater use of spare rooms. This is particularly true during the current cost of living crisis when homeowners may be in need of additional incomes, and private renters' budgets are harder stretched than they have been before. The NHS in Surrey is already piloting home sharing to find spare rooms for essential worker staff. Private companies already offer services to check and screen renters to be paired with older people with a spare room who don't yet need live-in care but whose families would appreciate an extra pair of eyes on their loved ones.

Given the scale of under-occupation and the shortage of housing for young professionals in public service and for graduates in the private sector, there is ample scope for a Surrey approach from key partners, which pilots a larger home-sharing

scheme. While this would not address statutory demand for housing services in the county, it would help address demand for more affordable private rented options, reduce under occupation and so make better use of Surrey's existing housing stock, as well as more intangible benefits that come from reducing social isolation amongst older residents. While no one would pretend that young professionals wouldn't prefer a home of their own, this should still be considered as part of the local housing puzzle.

... Investing in more step-down housing

Hospitals across the country are struggling to find suitable step-down housing options for older people who are medically fit to be discharged from hospital but unable to safely return home. While full-time residential care may be inappropriate, and in short supply, for these people, step-down housing would relieve pressure on hospitals in the county. It would also enable older people, who may be sceptical about moving into bespoke older people's housing, to move with confidence – knowing that this housing is only a temporary step. A pilot with Spelthorne BC, in north-west Surrey, has demonstrated demand for this kind of temporary housing.

... A focus on social rent

"We all had concerns about Affordable Rent when it was introduced, but now we see homes going to low priority families because high need families just can't afford them, so they stay in TA"

The majority of affordable rented housing built in Surrey in the past decade has been at Affordable Rent levels, i.e., at up to 80% of the market rate (compared with Social Rent which is typically just 50% of market rents). While all this housing is occupied, and the families and individuals who live there benefit from below market rents, so-called Affordable Rent is still priced out of the reach of many households including those in professional roles and working in essential services. Affordable rent is also having a distorting impact on the housing market.

First, within the affordable rented sector, housing associations report being unable to let new older people's housing to existing tenants because it would require them moving from their Social Rent homes into smaller, more expensive Affordable Rent homes. This is exacerbating under-occupation and means that family-sized affordable homes are not being made available for families. It also puts pressure on other services, including Adult Social Care, where adaptations are needed to existing homes to enable older people to continue living there as they cannot afford to move into newer, more suitable accommodation.

Secondly, Affordable Rent homes are simply not affordable to many of the people and families in high need on housing waiting lists across Surrey. The average rent in parts of Surrey for an Affordable Rent home is higher than the average weekly earnings of a woman in Surrey who works part-time. Districts and Boroughs reported that Affordable Rent homes often went to families in low need with higher incomes. Consequently, councils are having to provide expensive, insecure, temporary accommodation to some of these families who are unable to afford private rents or secure a socially rented home due to short supply.

While Affordable Rent homes clearly address demand within Surrey, they come at the cost of exacerbating other problems. Partners should focus, wherever possible, on building Social Rented homes, and should explore options to change the rent level of existing Affordable Rent homes to Social Rent through grant, reserves or looking to subsidise rent levels to bridge the affordability gap.

It should be recognised that such a shift may lead to fewer overall affordable homes being delivered, without an increase in grant funding, as Affordable Rent fits housing viability models better for providers (it generates more income than social rent). However, it would mean that genuinely affordable homes are provided for those families in greatest housing need in Surrey.

... Joining up the dots on potential savings to the public purse

"We aren't doing preventative work anymore; it's just mopping up the consequences of market failure"

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In all local government structures, there is inevitable fragmentation between different directorates and teams within and between councils. In two-tier areas like Surrey, that fragmentation is more pronounced, with housing separated from children's services, public health, adult social care and domestic abuse services – despite often serving the same residents.

Similarly, whilst there should be a clear business case for further significant investment in social rented and other forms of more affordable housing, this case can often be difficult to make when those organisations responsible for the investment (e.g. housing associations and stock-holding district and borough councils) are not necessarily the organisations that will benefit directly (e.g. acute hospital services, Health and Adult and Children's Social Care, Domestic Abuse Services and sectors struggling to recruit essential workers).

"Everyone's budgets are stretched, everyone is over capacity but sometimes it feels like we're protecting resource instead of working in partnership for the people of Surrey"

Financial constraints have meant that teams in all local authorities are acutely aware of delivering best value for money for residents and ensuring that budget is appropriately allocated and spent. There is the potential, however, to pilot pooling of budgets either across boundaries or in joint teams between different public sector organisations in the same geography where services are being provided to the same residents, whether through housing or a form of support within the care system. This joint approach has the potential to reduce waste, improve efficiency and deliver better outcomes for residents all while fostering a stronger partnership between and within these organisations.

This approach was exemplified during the COVID pandemic when some of the most vulnerable local residents, including those facing multiple disadvantage (substance misuse, mental health, engagement with the criminal justice system, domestic abuse) alongside homelessness. This approach brought together health, social care, housing

and public health around a problem that needed solving. This can be built on and expanded for other issues across the county.

New approaches may learn from those existing in the county linking housing and accommodation with those with complex needs. [The Public Health Changing Futures Programme](#) funded to £2.8M by DLUHC National Lottery ("Tackling Multiple Disadvantage in Surrey") has thirteen Lived Experience Experts with multiple disadvantage/complex needs engaged in co-designing projects. Twelve additional Lived Experience Experts with multiple disadvantage/complex needs are being engaged over the next few weeks.

We have recently appointed a Project Manager to co-ordinate community engagement requests. Healthwatch has been engaged in the development of the group.

[The Changing Futures Programme](#) now has eighteen Trauma Informed Specialists (commissioned via local Surrey VCSE organisations) offering up to eight hours of Trauma Informed Care and Support to people with multiple disadvantage / complex needs in communities. The programme is currently funded to support 60 people in Surrey's communities and links them to all local community assets, including housing.

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CASE STUDY – Better futures for vulnerable people – Somerset Strategic Housing Group

Vulnerable groups in Somerset were struggling to have complex needs met while navigating health and care services and also facing a housing supply shortage. At that time, partners were not working closely together enough and services were not joined up to help these residents access housing and receive the support that they needed.

The Somerset Strategic Housing Group learnt from the new ways of working that they piloted while providing emergency accommodation during COVID-19. They developed a new leadership and governance structure to manage the delivery of a shared vision and joint ownership-commissioning. This resulted in impacts on individuals and communities while adding service savings to reinvest in more preventative methods.

... Working together across boundaries to avoid duplication

"Post COVID it's just a tsunami of health issues... more homelessness... more complex needs, mental health problems.... housing is just picking up the slack"

Similarly, housing teams are hard pressed across the 11 districts and boroughs to deliver a wide range of services to an ever-expanding population of need. There is already joint working between some districts and boroughs and housing officers expressed support for these arrangements. There is significant policy alignment across many of the districts and boroughs in Surrey on housing policy, all districts and boroughs are facing many of the same issues and all have the same statutory responsibilities.

There is clear capacity for more shared working and pooling of resources. Housing teams across the county are doing similar jobs eleven times. This makes it harder for teams to foster specialisms. It also means that when one district or borough launches a new initiative that others see as best practice it then has to be replicated, from scratch, 10 times. It also means that external partners, including housing associations and service providers need to maintain eleven separate relationships.

Joint working and a greater pooling of resources wouldn't require any district or borough to relinquish any decision-making power over any aspect of their housing service but would give them access to teams that would be large enough to dedicate resource to specific challenges and allow officers working within those teams the ability to specialise and develop their careers. This is not about reducing headcount but increasing capacity through joint working.

Districts and boroughs should look to pool as many housing functions as possible, for example, in county wide or in sub-regional clusters.

...OPE partnership – building on trust

"We'd love to build.... but where? We have no land"

There is no consolidated map or database of publicly owned land and property in Surrey. There is serious potential to unlock public sector sites to give local government and partners across Surrey greater control and power over how and when the development of housing comes forward. There are potential funding sources to support this work and provide appropriate partnership governance around the identification of sites that could be suitable for housing, or housing-related infrastructure. As the land is in public ownership it would be for the relevant public authority, whether a local council, NHS institution, Central Government, or education to decide what to do with the land – but the first step is working together to identify what is available.

Public sector partners across Surrey should partner to work with One Public Estate to identify land in their ownership across the county, so that suitable sites for housing can be identified and partners can jointly agree an approach to realising the greatest social benefit from that land.

... Strategic support from Homes England

There is significant funding available from Homes England to boost the supply of housing in Surrey, particularly more affordable housing. To bring this funding to Surrey there would need to be a programme of sufficient scale and quantum to identify Surrey as a strategic partner for Homes England. This would require public sector landowners to come together to identify suitable sites and agree a strategic approach to land (see below) in order to be able to demonstrate both an adequate pipeline of development and a willingness to work together in a joint endeavour to tackle the housing crisis in Surrey.

CASE STUDY – Homes England Strategic Partnership – ASELA

The Association of South Essex Local Authorities has entered a partnership with the government's housing and regeneration agency (Homes England) to receive support for their proposals for housing growth as a part of the region's broader social, environmental and economic vision. The partnership is centred around a shared business plan that sets out special and thematic priorities for delivering a strong pipeline of potential opportunities in the area.

... A strategic approach to land

Different public sector landowners have different policies regarding the disposal of public sector land. This has bred distrust between some organisations where best price has been used as the driving policy in land disposal, rather than social value.

Rather than asking any one organisation to change their policy on their own it would be better if all public sector landowners agreed a common set of principles on the disposal of any public sector land, or a common approach with common principles on procuring development partners for public sector land.

This should include: exploring the opportunity to offer other partners within the public sector or affordable housing sector first refusal on any land being disposed; minimum thresholds for affordable housing should be agreed, including exploring granting outline planning permission on public land prior to disposal to avoid land auctions driving the price of the land up to a point where the delivery of affordable housing is not considered viable by the private sector; public sector land owners should also consider setting requirements on appropriate density for town centre sites and environmental standards so that developments on public sector land, irrespective of who builds them, set the standard for new housing in Surrey.

Encouraging a more open and constructive pre-application discussion between public sector landowners and the local planning teams may be productive in maximising the potential of sites in public ownership for housing, rather than schemes only being presented once uses and broad development principles have already been established.

CASE STUDY – Electronic Property Information Mapping Service (e-PIMS)

The Government Property Unit has produced a map for up-to-date information on the land of:

- government departments
- non-ministerial departments and their executive agencies
- arms length bodies
- non-departmental public bodies
- special health authorities

The map can be used to identify and map developable public sector land that may then be eligible for a One Public Estate partnership. The GPU also provides training on how to use this tool effectively.

... A joint approach to Greenbelt

Greenbelt has always been a defining part of the attractive character of Surrey, so any previous release of Greenbelt for specific identified needs has been met with some debate and/or opposition. Whilst there remains pressure from some quarters to identify and release other suitable low-quality Greenbelt to meet very specific need for infrastructure or specialist housing, planning policies across the county unanimously work to protect the Greenbelt from further development. Further, recent measures announced by central government suggest further protection to the Greenbelt.

A common response to this emerging policy in order to establish a common set of principles, agreed across Surrey local would give residents more confidence and offer reassurance that there is a careful, strategic approach to an issue that will always attract serious scrutiny and that local government, as a matter of course, will resist ad hoc release of Greenbelt land.

CASE STUDY – ‘Exceptional’ Circumstances to Release Greenbelt Land – Planning Resource

Planning Resource has highlighted the most common exceptional circumstances that have been used to make the case to release greenbelt land to meet specific needs, rather than just general private development. These are:

- Unmet need for local development
- Release is most sustainable option (i.e., proximate access to services and transportation)
- Lack of contribution to greenbelt purposes
- Creation of defensible boundaries
- Limited visual impact
- Provision of infrastructure
- Reuse of brownfield land

... Capacity to deliver

"We can't wait for the market... you could be waiting 1,000 years for a home"

There is a mixture of capacity and appetite across the public sector in Surrey to build housing across the public sector in Surrey. Several authorities are stock holding and are building homes, others have set up a council-owned house building company, others work in partnership with local housing associations. Some have expressed reservation about the management and administration, technical capacity, regulation and financial risk associated with directly delivering housing. A partnership approach would help accelerate housing delivery within the public sector, particularly on public sector land.

In some parts of the County there are housing associations closely aligned with districts and boroughs and in these places a preferred partner approach to delivery makes a great deal of sense. Across the rest of the county, particularly if a co-ordinated approach to public sector land is taken forward, identifying districts or boroughs with house building capacity and experience, or a developing housing association, to lead housing delivery would give partners the ability to plan long-term, commit appropriate resource, and have greater oversight and control of housing delivery in the county.

... 20-minute principles in planning

"You need density to make this real or it's just 20 minutes in a traffic jam...."

This strategy did not interrogate planning policy or cut across the local plan process. However, an area of focus in the scope agreed by the Surrey Delivery Board was on 20-minute neighbourhoods as a way of embedding sustainability in development and promoting independent living for all residents. Surrey is a low-density county. Even at

its most dense, in Woking, density levels fall short of what would normally be expected for a 20-minute neighbourhood. This means that many residents are car dependent and live at a distance from shops and services.

While the existing built environment is not going to be comprehensively redesigned there is potential with new settlements, urban extensions, or regeneration areas to embed the principles of 20-minute neighbourhoods: designing for gentle density that ensures shops and services are a short walk, cycle or wheel away from home, and ensuring that active transport measures are designed in as a first principle. Local plans should look to incorporate these principles into site allocations for larger developments or should consider Development Plan Documents to embed these principles into newly identified sites.

CASE STUDY – Hailsham, 10 Minute Town

Hailsham is a small town of 20,000 people in East Sussex. The Town Council adopted a neighbourhood plan, following a referendum in 2021 which puts 20-minute neighbourhood principles into practice within the town.

The proposals do not envisage a radical shift in density or scale of development, but does look to improve active transport links throughout the town to make it easier for residents to walk and cycle

"It's just impossible for first time buyers in Surrey, there might be pockets.... but now you have to factor in travel time and fuel costs... I just don't know"

Build-to-Rent housing (BTR) has emerged in the UK over the past decade but is very common in the United States and Europe. Developments of flats are built by a single owner who then acts as the landlord, providing housing management and longer-term tenancies within the private rented sector. These developments are usually built more quickly and completed sooner than comparable schemes with homes for sale. This is because the market can absorb these homes more quickly as there is less of a financial hurdle (no large deposit or mortgage required) for occupants.

BTR housing doesn't tend to yield traditional social rent housing (although some local authorities have acted to secure this) and the affordable offer tends to be a form of Discounted Market Rent (DMR) which may be similar in cost to some Affordable Rent products in Surrey.

Looking to secure BTR development close to transport hubs and major employment centres could accelerate housing delivery in Surrey and provide a better housing offer for young professionals, graduates and key public service workers.

CASE STUDY – Newbury Build-to-Rent

Build to Rent developer Grainger is completing 232 homes in the centre of Newbury. The scheme will complete in phases over just 12 months. Once completed the homes will then be managed by Grainger.

All the homes are for rent on a 'Stay As Long As You Want' tenancy model with an initial tenancy of up to three years. Residents are able to bring pets with them, the homes have fibre broadband, a co-working space, a bookable meeting room. Renters will also have an onsite Resident Service Team to respond to any issues with their homes.

... *Active Transport*

Low density across Surrey means that many residents are car dependent. A lack of funding for comprehensive local bus services means that without a car many residents are isolated from shops, jobs and services. Where 20-minute neighbourhoods have been introduced as policy elsewhere, they have focused on retrofitting active transport measures with support for segregated cycle lanes to make journeys more viable and attractive and safe for new or anxious cyclists. As a sustainable and low cost means of transport, better walking and cycling options should be actively explored to link all town centres with suburbs.

CASE STUDY – Better Points

As investment in active transportation infrastructure can be prohibitive for encouraging more sustainable and healthy forms of travel, the app-based programme Better Points seeks to reward individuals for choosing to use public transportation and walking or cycling to incentivise behaviour instead. This programme provides users with vouchers for town centre businesses to draw residents into active travel while simultaneously contributing to the local economy.

... *Building a strong circular economy through Retrofit*

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Whether at a small scale today, or in a much larger scale in the years to come, Retrofit is a growing part of the housing ecosystem, brought further into focus through the recent fuel price increases reducing the ability of low income households to heat their homes. Almost all councils in Surrey have declared a climate emergency and have set targets for reaching net zero carbon. Without retrofit of housing (or replacement of that housing with new, zero carbon housing) those targets will be impossible to meet.

Surrey County Council is already working to provide grants and support for retrofit. All stock holders are exploring routes to retrofit and investigating the condition of their stock. First there is potential for joint-working on stock investigation and on pooling buying power, through partnership, to get a better deal for the public sector in Surrey.

More proactively, this is a huge opportunity for Surrey. This will be a growing sector of the economy, with wider benefits for industries within the supply chain. This could be an economic cost to Surrey, or an opportunity to develop a strong local retrofit economy. This needs to be a holistic approach, starting with schools and colleges, reskilling for trained adults whose skillset can be adapted to new technology, space and support for industry to develop and grow locally, and co-ordination between partners with budgets to make sure the spend goes not just on projects in Surrey, but generates community wealth within Surrey.

CASE STUDY – Skills Strategy and Action Plan, Programme Co-Production – Hampshire County Council

Despite an increase in funding for careers and skills in recent years, initiatives and funding lacked local alignment. The County wanted to ensure that work was not replicated across Districts and Boroughs while also increasing capacity and resilience through a shared programme. Led by council's economic development services and a joint skills management board, Hampshire capitalised on strong partnerships with providers, employers and skills programme networks to build closer relationships with and amongst the Districts and Boroughs, meeting regularly to ensure they were coordinating on the best ways to reach the objectives of their shared strategy together.

CASE STUDY – Green New Deal – Camden Council

Camden commissioned an integrated plan to bring together employment, skills and local economic benefit into the design of the housing retrofit programme from the outset. Beyond traditional procurement, this approach will ensure that community engagement, as well as additional employment, and updating the skills of new and existing workers, are designed in to the project and reflect the demands of the growing market for 'green construction'.

... *Surrey's Brand*

"Historically Surrey has marketed itself as the detached-house-with-space-for-two-cars sort of place"

Surrey is a diverse and prosperous county. For the most part people lead good, healthy lives and have chosen to live in Surrey because of the excellent quality of life offered to them. Participants in this study spoke about the historic way it was seen as 'England's California' and the phrase 'Shangri-La' was mentioned more than once. The flip side is that others talked about the county being seen by outsiders as a firmly suburban place, which may lead some potential residents to discount the county without proper consideration as a place to settle or raise a family. It also means that Surrey is discounted for much-needed government funding, including Levelling Up as it is thought of as a place with no issues that need resolving. Correcting the record and presenting an updated Surrey Story is an important part of attracting investment and support from the Government and attracting more residents.

The domestic migration figures paint a stark picture of people moving elsewhere in the South-East, and leaving Surrey in significant numbers. While some of this is a direct consequence of the unaffordability of housing compared to other areas, thought should also be given to how Surrey can better market itself to potential residents, businesses, and investors so that the housing market can attract and cater to a wider range of residents.

Taking This Forward

This strategy presents the evidence of the Surrey Housing Crisis. Its existence is undeniable, and the pernicious scale of that crisis is a real threat to the vitality, prosperity, and security of all parts of the county in the coming decades. It identifies an agenda for lobbying central government as well as practical actions that local government and partners can take locally to address that crisis.

However, there's no power to compel action. The decision on whether to act rests with local councils, housing associations, and other partners. The challenge was put repeatedly from stakeholders in the summer: 'Who is making the case for housing in Surrey?' and there is an undeniable risk that without a driving force behind this work, it risks being placed on the figurative dusty shelf.

9 There are several existing partnership forums: the One Surrey Growth Board, the Surrey Forum, the Surrey Delivery Board, the Surrey Planning Officers Association and the Surrey Chief Housing Officers Association. All of these have a role to play in discussing, advocating and driving the change needed.

Some of the recommendations in this strategy can be taken forward by individual partners or clusters of partners subject to their appetite for change. Decisions on approaches to planning sit firmly within the remit of the individual Districts and Boroughs; approaches to pooling housing team responsibilities is a conversation to be had between Districts and Boroughs.

However, in others there will be a requirement for strong programme management and formal governance: establishing a partnership that can drive a skills, employment and economic growth agenda focused on the opportunity that retrofit offers; or in establishing a Surrey Land Partnership, which could access significant funding and provide far greater control for local government in the county to drive the delivery of affordable housing and infrastructure that their communities need. These will require dedicated additional resource and programme management and a shared partnership approach to governance that builds trust and confidence between equal partners.

If partners were to take forward the proposal for a strategic partnership on public sector land then an indicative approach would require dedicated resource to work with members of that partnership to deliver the following at pace:

- a) Establish and agree appropriate governance for the partnership;
- b) Map all publicly-owned land;
- c) Categorise all publicly-owned land according to current use and planning status;
- d) Work with partners to establish i) need and ii) aspiration for land use;
- e) Agree a priority list of sites;
- f) Agree procurement of a development partner, creation of a joint venture, use of direct delivery or disposal routes, including disposal with planning permission for land;
- g) Manage sites through those processes;

- h) agree clienting arrangements for land where a development partner or joint venture is procured.

It may be that this approach could move even more quickly if piloted with one district or borough in the first instance, but the real benefit would come from an ambitious approach that brought all public sector landowners to the table to work on a common endeavour on behalf of the people of Surrey.

An ambition should be set among all willing partners to identify a land assembly opportunity in every District and Borough in Surrey in the twelve months from the adoption of this strategy. This would demonstrate commitment to working together, to bringing forward public land in the interest of the people of Surrey and create momentum for more joint working with common purpose.

In the interests of maintaining a partnership approach to the delivery of this strategy one of the existing boards, whether OSGB, SDB or the Surrey Forum should be agreed as the cheerleader for advancing the strategy, beating the drum for action on the housing crisis, and having the appropriate convening power to bring partners together to agitate for greater collective action and, jointly, partners could agree to take adapt this strategy into a formal delivery plan with agreed actions and a timetable to ensure clarity, certainty and to help better deliver meaningful change on this most important of issues.

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SURREY COUNTY COUNCIL**CABINET**

DATE: 28 MARCH 2023

REPORT OF CABINET MEMBER: CLARE CURRAN, CABINET MEMBER FOR EDUCATION AND LEARNING

LEAD OFFICER: RACHAEL WARDELL, EXECUTIVE DIRECTOR FOR CHILDREN, FAMILIES AND LIFELONG LEARNING

SUBJECT: SEND CAPITAL PROGRAMME 2023/24 DELIVERY

ORGANISATION STRATEGY PRIORITY AREA: GROWING A SUSTAINABLE ECONOMY SO EVERYONE CAN BENEFIT/ TACKLING HEALTH INEQUALITY/ ENABLING A GREENER FUTURE/ EMPOWERING COMMUNITIES

Purpose of the Report:

Cabinet approval is sought for use of £100.2m of the total agreed future SEND Capital Funding of £202m approved in January 2023 and reflected as budget in the Medium Term Financial Strategy (MTFS) 2022/23 to 2027/28. The capital investment is for twenty SEND Capital Programme projects where viable schemes, locations and costs have been confirmed. This is to create accommodation for circa 700 additional state-maintained specialist school places in Surrey from September 2023 onwards so that Surrey resident children with additional learning needs and disabilities who require specialist school placements can be educated closer to home, rooted in their local communities.

Recommendations:

It is recommended that Cabinet:

1. Agrees the use of £100.2m of the total approved SEND Capital budget of £202m for 2022/23 to 2027/28 against twenty SEND Capital Programme projects with confirmed viable schemes, locations, and costs. These are part of the four capital strategies previously approved by Cabinet between 2019-2022.
2. Approves procurement of the supply chain for the delivery of all associated services required, in accordance with the Council's Procurement and Contract Standing Orders.
3. Agrees that the Deputy Chief Executive and Executive Director of Resources, and the Director of Land and Property are authorised to award contracts, up to +10% of the budgetary tolerance level for individual projects and within the overall £202m funding envelope for 2022/23 to 2027/28 that has already been agreed.

Reason for Recommendations:

- Investing in the Capital Programme's 2023/24 delivery tranche will generate a positive impact on outcomes for children with complex special educational needs and disabilities, as well as improving the Council's financial sustainability.
- The committed expansion projects are business critical to ensure Surrey County Council (the Council) discharges its statutory duties under Section 3 of the Local Government Act 1999, Sections 13 and 14 of the Education Act 1996 and Part 27 Section 3 of the Children and Families Act 2014.
- The confirmed budgets against each of the 20 projects in the Capital Programme's 2023/24 delivery tranche are above the current threshold for £1m. Cabinet's delegated authority is required to enable the Cabinet Members for Property and Waste, Education and Lifelong Learning and Finance and Resources to approve contracts and allocate resources from the approved Capital budget for the programme to individual projects following Capital Programme Panel (CPP) approval of business cases.
- To that end, agreement is sought to use defined resources to enable project progression against the Procurement Forward Plan, so that contracts can be awarded in time to facilitate target delivery timescales for 2023 and 2024.

Executive Summary:

Business Case:

1. The SEND Capital Programme is aligned with Surrey's Community Vision 2030, and Surrey County Council's Cabinet endorsed new Inclusion and Additional Needs Strategy 2023-2026, which sets out the ambition that all Surrey's children and young people with additional needs and disabilities are enabled to lead their best life.
2. There has been significant investment in additional state-maintained specialist school places in Surrey over the past four years to enable children and young people to be educated locally to their families. Our strong partnerships with local specialist and mainstream schools have enabled this to happen alongside robust forecasting of demand to understand what the profile of need will look like county-wide over the coming years.
3. The Department for Education expects Local Authorities (LA) to manage their specialist education estates efficiently to avoid detriment to schools' educational offers, creating disadvantage to children and young people who have SEND or to the LA's financial position. This means ensuring the availability of state-maintained specialist school places that are appropriately matched to need-type, phases of education and geographic location so that all of Surrey's statutory school age children with an Education, Health, and Care Plan (EHCP) that require a full-time specialist setting in either a mainstream SEN Unit or Specialist School have a named placement, ready for the beginning of each academic year.
4. Between 2019 and 2022 Cabinet approved the strategies and capital investment for four phases of the Special Educational Needs and Disabilities (SEND) Capital Programme. With this investment the programme is aiming to deliver at least 2,440 permanent additional specialist school places in Surrey between 2019-2026 to create capacity for 5,760 state maintained specialist places to meet projected demand for up to 6,000 specialist places in total by 2030/31.

5. As of academic year 2022/23, Surrey's state-maintained specialist education estate has been increased by approximately 800 places, from around 3,320 in 2019 when the Capital programme started to around 4,000 places now. These specialist school places are almost full, noting that new places are being phased in and some of the existing accommodation needs to be re-provided as it is not fit for purpose.
6. Table 1 below summarises the number of schemes and additional places delivered and to be delivered by the programme and explains the variations in average cost per additional place. The total projected costs of the projects to be delivered in the future is £223m, for which £202m approved funding is in place and a further £21m funding is being sought.

Table 1: SEND Capital Programme Total Programme Costs and Place Numbers

Delivered or To Be Delivered	Number of projects	Number of additional places	Cost	Commentary
Delivered 2019 – 2022	31	800	£19.9m	The average cost per additional place is £25k. This is because most of the projects delivered in the early years of the programme have been refurbishments or expansions which have a lower cost and are faster to deliver. Refurbishments have a lifespan of around 40 years. The large new build was funded directly by the DfE, which brought down the average cost per additional place to SCC. This school has a lifespan of around 60 years.
To be delivered 2023 – 2024 (the scope of this Cabinet paper)	20	700 (plus re-provision of 150 places)	£100.2m	The average cost per additional place is £143k for the 20 projects that the Recommendations in this Cabinet paper relate to. The average cost per additional place is higher because these projects include a higher proportion of major new builds which cost more to deliver, costs have increased due to higher inflation and these schemes include the new build re-provision of accommodation for existing places that have reached end of life. Including those 150 places demonstrates an average cost per place to be delivered of £118k. Major new builds and medium sized new build extensions have a lifespan of around 60 years.
To be delivered 2024 – 2026	25	1077	£122.8m	The average cost per additional place is £114k for the 25 projects in the programme. The average cost per additional place is higher because these projects include a higher proportion of major new builds which cost more to deliver, and costs have increased due to higher inflation. However, the average cost per place is mitigated by the inclusion of two “free schools”, which are being funded and delivered by the DfE. Major new builds have a lifespan of around 60 years.

7. The Council's Capital Programme forms one important aspect of Surrey's Additional Needs Strategy and Transformation Programme which aims to eliminate the Council's Dedicated Schools Grant High Needs Block deficit and embed sustainable practices to work within the level of the overall funding.

8. Prior to the Council entering into a Safety Valve Agreement with the DfE (Department for Education) (Mar 2022), the Council's High Needs Block was projected to reach a deficit of £118m at the end of 2021/22.
9. The Council's Safety Valve agreement with the DfE includes a condition to deliver an ambitious Capital programme that will improve the long-term sufficiency of state-maintained specialist educational provision that meets the needs of communities across Surrey.
10. Each additional specialist school place delivered under the Capital Programme realises c£30k cost containment when it is filled. This is based on the difference between the average costs of specialist independent school and out of county places at c£53k, and equivalent state-maintained specialist school places at c£23k.
11. The estimated full year cost containment effect of the places once they are all filled will be £20.9m. Additional places are phased in over a 2-3 year period, depending on the scale of individual schemes. This is because schools need to build their staffing capacity to support the new places. In the first year post project delivery there will be a part year effect to the benefits in the relevant financial year as the vast majority of pupils take up new places from September. Table 2 shows the cost containment achieved between 2019/20 – 2022/23 and the cost containment forecast between 2023/24 – 2029/30.

Table 2: SEND Capital Programme Cost Containment

	DELIVERED				TO BE DELIVERED							
Financial Year	2019 /20	2020 /21	2021 /22	2022 /23	2023 /24	2024 /25	2025 /26	2026 /27	2027 /28	2028 /29	2029 /30	Total
Cost Containment (£m)	£1.54 m	£1.48 m	£5.8 m	£7.6 m	£7.2 m	£8.76 m	£8.34 m	£9.17 m	£8.24 m	£5.9 m	£3.48 m	£67.5 m

12. Successful delivery of the next 20 projects under the 2023/24 delivery tranche (Appendix B) is essential to allow contracts to be signed in time to ensure place availability from the beginning of the September 2023 and September 2024 academic years. Increasing capacity in the state-maintained specialist education estate is essential to Surrey delivering a sustainable High Needs Block.
13. Achievement of cost containment targets aligned with the Council's Safety Valve Agreement with the DfE that results in an in-year balance in the DSG HNB (High Needs Block) by 2027/28 allows Surrey to continue to deliver services and support for children, young people, and families, whilst remaining financially sustainable. Achievement of Safety Valve Cost Containment from Capital delivery is on track and the recommended approvals are required to ensure that delivery of these 20 projects is not delayed, which would put the benefits described at risk.

Benefits of the proposed action to Surrey Residents

14. Surrey resident pupils with SEND who require a specialist school placement can attend their nearest most appropriate state-maintained school close to home and rooted in their local community.
15. Provides residents in identified areas of the county where there is an identified shortfall of specialist provision access to the same level of high-quality specialist support as the rest of Surrey.

16. Helps to ensure Surrey's Local Offer matches the identified needs of children and young people who have SEND across the county.
17. Aligns with Surrey's Preparation for Adulthood programme and strategy for post-16 to create local further education and employment pathways such as apprenticeships and supported internships. This enables Surrey resident pupils who have SEND to make a successful transition to adulthood and secure future employment.
18. Will reduce excessive journey times between home and school, SEND transport costs and maximise opportunities for pupils to develop independent travel skills. This will also help to address local congestion around specific school sites as well as traffic flow around the county, which will be of benefit to Surrey's Green Agenda.
19. The new specialist school places ensure increased access to local educational provision that achieves high quality outcomes, as well as a more efficient use of limited resources that can be used to deliver improved services to children and young people with additional learning needs in Surrey.
20. The 20 projects deliverable under the 2023/24 delivery tranche supports achievement of cost containment that results in an in-year balance in the DSG HNB by 2029/30 to allow Surrey to continue to deliver services and support for children, young people, and families, whilst remaining financially sustainable.

Consultation:

21. Public consultation is undertaken for each approved project in line with Department for Education statutory processes for Making Significant Changes to Maintained Schools or an Open Academy by Mutual Agreement and Free School Presumption (Section 10 Consultation) processes. This public-facing work needs to demonstrate that fair and open local consultation has been undertaken with all stakeholders who could be affected by the proposed change, and that the Local Authority or Academy Trust has considered all responses received. The Lead Cabinet Member for Education and Learning and the Regional Director (or the Secretary of State as appropriate) will need evidence that they have been consulted and will consider any reasonable objections from them.
22. Public consultation is also carried out for each approved project going forward in line with statutory Planning Consultations and Judicial Review periods for Land and Property developments.

Risk Management and Implications:

23. All Council building and refurbishment projects are required to include risk, issue, and quality registers. Identified risks and planned mitigations are outlined below:

	Risk description	Mitigation action/strategy
a.	Change of scope/ technical approach and impact on project costs.	<ul style="list-style-type: none"> • The projects have been through detailed feasibility and are progressing through RIBA stage boundaries. Cost risks are mitigated by capped budgets against the individual projects. These include construction costs, professional fees, inflation, client costs, and appropriate contingencies and costs associated with improved sustainability standards, including considerations relating to

	Risk description	Mitigation action/strategy
		buildings that are net zero carbon in operation and with additional climate resilience measures.
b.	Current volatile construction industry market conditions	<ul style="list-style-type: none"> Mitigated by accurate cost planning as advised by the Council's appointed Cost Consultants in line with benchmarking, market analysis and appropriate contingency provision against individual projects. This is applicable to the technical approach and scope for individual schemes to cover for any unforeseen risks such as abnormal ground conditions and service diversions that may arise during the builds.
c.	Planning Approval and adherence to statutory timescales, resulting from programme demand on top of business as usual, against current capacity shortage.	<ul style="list-style-type: none"> Mitigated by compliance with statutory consultation and determination periods. Forward planning between Land and Property, Programme, Reg 3, and appointed Planning Consultants has already commenced to ensure sufficient capacity required to meet projected demand from 2023-2026 and early Pre-App, aligned with Land due diligence where applicable.
d.	Affordability of the overall SEND Capital Programme, resulting from increased costs of multiple projects	<ul style="list-style-type: none"> Mitigated by adoption of a design to budget approach against capped budgets and accurate cost planning against industry benchmarking that the Council's appointed Cost Consultants have advised upon for individual cost plans. Project and technical teams actively evaluate opportunities to contain cost through appropriate scope reduction and project-specific contingency provision. Continued financial governance oversight and assurance through Capital Property Panel to ensure all investments represent value for money.

24. Each project's scope must meet statutory and legislative requirements and design guides ([Building Bulletin 104](#)). Designs have been reviewed and value engineered to be restricted to essential requirements for the schools, with cost effective designs and materials selected to ensure efficiency of investment.
25. At a programme level cost plans include allowances for design development and construction risk and are based on current market conditions. Cost plans also include budgets for meeting Surrey's Operationally Carbon Net Zero target. These will continue to be subject to approval from CPP and reported by exception for decision-making.
26. CPP ensures that each capital scheme or project is assessed for both financial and service risk, the timescales for delivery are realistic and that all associated capital and revenue implications are fully covered in the current and future years. This provides assurances of consistency with the Council's Corporate Strategy, Capital and Investment Strategy, Asset and Place Strategy, Highways & Transportation Asset Management Plan and Directorate Strategies.

Financial and Value for Money Implications:

27. The capital investment required to deliver the Capital Programme's 2023/24 delivery tranche is £100.2m. This is part of the refreshed Capital MTFs (Medium Term Financial Strategy) approved by Cabinet on 31 January 2023 which provides £202m for SEND Capital against committed and planned projects in 2023-2026 delivery tranches. This will deliver c700 additional specialist school places and re-provide c150 existing places which are currently provided in accommodation that is at end of life and not fit for purpose. The majority of the 2023/24 projects are new build with higher costs per pupil place, as compared to the previous tranche where a considerable proportion were refurbishment and internal adaptations only.
28. Table 3 details the profiled spend against the 20 named projects in the 2023/24 delivery tranche. All projects have been through feasibility, have confirmed scopes and capped budgets that the Council's appointed Cost Consultants have advised upon.

Table 3: Capital cost profile and funding

Capex and Funding Profile	2020/21 £'m	2021/22 £'m	2022/23 £'m	2023/24 £'m	2024/25 £'m	2024/25 £'m	Total £'m
Total Scheme cost	0.14	2.77	7.32	7.70	54.93	27.34	100.20
Funded by:							
Third Party	-	-	-	-	-	-	-
Government Grant	0.14	2.73	6.46	2.55	31.21	5.52	48.61
Revenue Funding	-	-	-	-	-	-	-
SCC Funding Required	-	0.04	0.86	5.16	23.72	21.82	51.59
Total Funding	0.14	2.77	7.32	7.70	54.93	27.34	100.20

29. The 2023/24 delivery tranche will realise c£20.9m per annum total cost containment potential to Surrey's Dedicated Schools Grant High Needs Budget (DSG HNB) once all places are filled and the new SEND provision is at full capacity.
30. The programme contributes to the Council's requirement to demonstrate we are improving value for money in the service provided through alignment with the Council's DSG Management Plan and achievement of Capital Strategy Cost Containment Targets. Approximately 700 additional specialist school places in the independent sector would equate to £37m per year every year, which is based on an average unit cost of £53k per pupil per annum for independent sector provision. This is compared to the average cost for state-maintained specialist places at £23k per pupil per annum and equivalent costs for c700 places of £16m. Provision of the additional state-maintained specialist school places would generate an approximate saving from 2023-2028 of £30k per pupil place per year (Table 4).

Table 4: Efficiency savings / Value for Money/ Revenue implications

(Cumulative)	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30	Total
	£'m	£'m	£'m	£'m	£'m	£'m	£'m	£'m	£'m	£'m	£'m
Gross efficiencies from places created	-	(1.23)	(3.57)	(6.98)	(11.28)	(15.01)	(17.82)	(19.73)	(20.67)	(20.91)	(117.20)
Revenue Cost											
Employees	-	-	-	-	-	-	-	-	-	-	-
Supplies and Services	-	-	-	-	-	-	-	-	-	-	-
Third Party	-	-	-	-	-	-	-	-	-	-	-
Borrowing costs	-	-	-	0.09	0.45	1.40	2.03	2.03	2.03	2.03	10.07
Other	-	-	-	-	-	-	-	-	-	-	-
Total costs	-	-	-	0.09	0.45	1.40	2.03	2.03	2.03	2.03	10.07
Net efficiencies	-	(1.23)	(3.57)	(6.98)	(10.83)	(13.61)	(15.79)	(17.70)	(18.64)	(18.88)	(107.13)

Figures in red represent a positive contribution to efficiencies/income

31. Table 4 shows the efficiency across all years once the new places are filled and the associate borrowing costs; for the period up to 2029/30 the total efficiency (net of borrowing costs) is £107m. School decant into temporary accommodation has enabled efficiencies to be achieved from 2021/22. The projects cannot continue to be delivered while the schools are in operation without temporary accommodation. Efficiencies continue for the period each new place is filled by a pupil who would otherwise have been educated in an independent SEND provision.
32. The revenue efficiencies relating to the financial year the places created are realised from the September. The efficiency is pro-rated across the remaining financial year and continues into future years as full year efficiencies. Borrowing costs are held corporately.
33. The SEND Capital Programme's progress and delivery tranches are aligned with the achievement of the Council's Safety Valve Agreement Capital Strategy Cost Containment Targets to 2026/27. Appropriate financial governance and reporting continues to be in place through CPP to ensure value for money and cost effectiveness of each scheme.
34. CPP robustly evaluates all capital schemes' detailed business cases in the context of overall approved programme funding envelopes against a pre-defined set of criteria, making sure all capital and revenue implications have been addressed, before a scheme is progressed. This provides assurance that projects within the capital programme have gone through the correct governance and approval in line with the requirements of the Constitution. CPP endorsement ensures Capital Programme proposals are consistent with the Council's Corporate Strategy, Capital and Investment Strategy, Asset and Place Strategy, Highways & Transportation Asset Management Plan and Directorate Strategies.

Section 151 Officer Commentary:

35. Although significant progress has been made to improve the Council's financial position, the financial environment remains challenging. The UK is experiencing the highest levels of inflation for decades, putting significant pressure on the cost of delivering our services. Coupled with continued increasing demand and fixed Government funding this requires an increased focus on financial management to ensure we can continue to deliver services within available funding. In addition to these immediate challenges, the medium-term financial outlook beyond 2022/23 remains uncertain. With no clarity on central government funding in the medium term, our working assumption is that financial resources will continue to be constrained, as they have been for the majority of the past decade. This places an onus on the Council to continue to consider issues of financial sustainability as a priority in order

to ensure stable provision of services in the medium term.

36. The proposal to delegate authority to allocate capital budget will expediate decision making and assist delivery of the safety valve agreement. The amount of capital budget proposed is included the current MTFS. As such the Section 151 Officer supports the recommendations in this report.

Legal Implications – Monitoring Officer:

37. This is an updating paper to Cabinet following previous approval of the strategies and capital investment for four phases of the Special Educational Needs and Disabilities (SEND) Capital Programme.
38. Cabinet has previously approved SEND capital funding of £202m in the Medium Term Financial Strategy (MTFS) 2022/23 to 2027/28. This paper seeks approval to utilise £100.2m of the approved funding towards 20 SEND projects which have been confirmed as being viable schemes and locations.
39. As more information becomes available and projects are progressed, site specific legal advice should be obtained for each project to ensure that the Council meets its legal obligations.
40. Cabinet is under fiduciary duties to residents when utilising public monies. In considering this business case, Cabinet Members will want to satisfy themselves that the recommendations represent an appropriate use of the Council's resources.
41. Legal Services will provide such assistance and advice as is required in respect of the procurement of the supply chain for the delivery of the associated services required to ensure compliance with The Public Contracts Regulations 2015, as amended, and the Council's Procurement and Contract Standing Orders.

Equalities and Diversity:

42. Surrey's SEND Capital Programme is expected to have a positive impact on Equalities and Diversity, because of increasing the number of Surrey children and young people who will have their additional needs better met by local schools in their local area.
43. Individual Equalities Impact Assessments are undertaken in line with the Department for Education statutory processes for Making Significant Changes to Maintained Schools or an Open Academy by Mutual Agreement.

Other Implications:

44. The potential implications for the following Council priorities and policy areas have been considered. Where the impact is potentially significant a summary of the issues is set out in detail below.

Area assessed:	Direct Implications:
Corporate Parenting/ Looked After Children	The programme of capital investment directly supports the Surrey Corporate Parenting Strategy 2020. Increasing the sufficiency of provision in Surrey for children and young people who require specialist school places

Area assessed:	Direct Implications:
	and/or who are looked after will enable better long-term outcomes, with children closer to home and more connected to local communities and support services. Local capital investment improves value for money through the strengthening of collaboration with local providers, as well as other local authorities to manage the market more effectively.
Safeguarding responsibilities for vulnerable children and adults	The Council has a duty to promote and improve safeguarding in education as well as educational outcomes for all children and young people who are vulnerable or disadvantaged. The creation of additional specialist capacity closer to home supports highly effective joint agency monitoring to safeguard children and increased demand on care services.
Environmental sustainability	The provision of additional state-maintained specialist places closer to home will reduce the average journey times for learners. This also supports the development of sustainable and independent travel skills for pupils with alternative learning needs, which is aligned with Preparation for Adulthood outcomes.
Compliance against net-zero emissions target and future climate compatibility/resilience	Design philosophy that has been adopted to create new or refurbish and extend existing buildings will support low energy consumption, reduce solar gain, and promote natural ventilation. Any proposals will be in line with this policy and any new building will be to the standards in the local planning authority's adopted core planning strategy. Commitment to drive forward the transition to a zero-carbon built environment, through the pursuit of lower operational energy use, increased supply of renewable energy to Surrey's buildings and reduced embodied carbon – the GHG emissions associated with non-operational phases like construction.

What Happens Next:

45. Project progression of the 20 projects through procurement and into contract to planned target key milestones in line with the Procurement Forward Plan.
46. Development of Outline Business Cases and finalisation of Cost Plans in line with forward planning for Capital Programme Panel and Cabinet Member approval for Capital delivery tranches for 2024/25-2026/27.
47. Continued Capital Programme Financial and Progress reporting monthly to Capital Programme Panel, Cabinet Members and at Board level.

Report Author: Liz Mills, Director Education and Learning, liz.mills@surreycc.gov.uk

Consulted:

Internal

- Cabinet Member for Property and Waste, Natalie Bramhall
- Cabinet Member for Education, Clare Curran
- Cabinet Member for Resources, David Lewis
- Executive Director Children, Families and Learning, Rachael Wardell
- Director Finance Insights and Performance, Rachel Wigley
- Director Land and Property, Simon Crowther
- Director Education and Learning, Liz Mills
- Director Corporate Finance and Commercial, Anna D'Alessandro
- Director Law and Governance, Paul Evans
- Strategic Finance Business Partner Land & Property, Louise Lawson
- Strategic Finance Business Partner, Daniel Peattie
- Assistant Director Capital Delivery, John Morris
- Assistant Director SEND Transformation, Emily George

External

- CEOs of Multi Academy Trusts, Headteachers and Governors of Schools
- Local stakeholders in line with Department for Education statutory processes for Making Significant Changes to Maintained Schools or an Open Academy by Mutual Agreement
- Surrey Specialist and Mainstream Primary and Secondary Phase Councils

Appendices:

Appendix A: SEND Capital Programme Projects Delivered 2019-2022

Appendix B: SEND Capital Programme 2023/24 Delivery Tranche

Part 2 report

Sources/background papers:

SEND Capital Strategies

[SEND Capital Programme Phase 1 Cabinet Reports 24/09/2019](#)

[SEND Capital Programme Phase 2 Cabinet Report 29/09/2020](#)

[SEND Capital Programme Phase 3 Cabinet Report 26/01/2021](#)

[SEND Capital Programme Phase 4 Cabinet Report 25/01/2022](#)

Cabinet Decisions

[SEND Capital Programme Phase 1 Cabinet Decision 24-Sep-2019](#)

[SEND Capital Programme Phase 2 Cabinet Decision 29-Sep-2020](#)

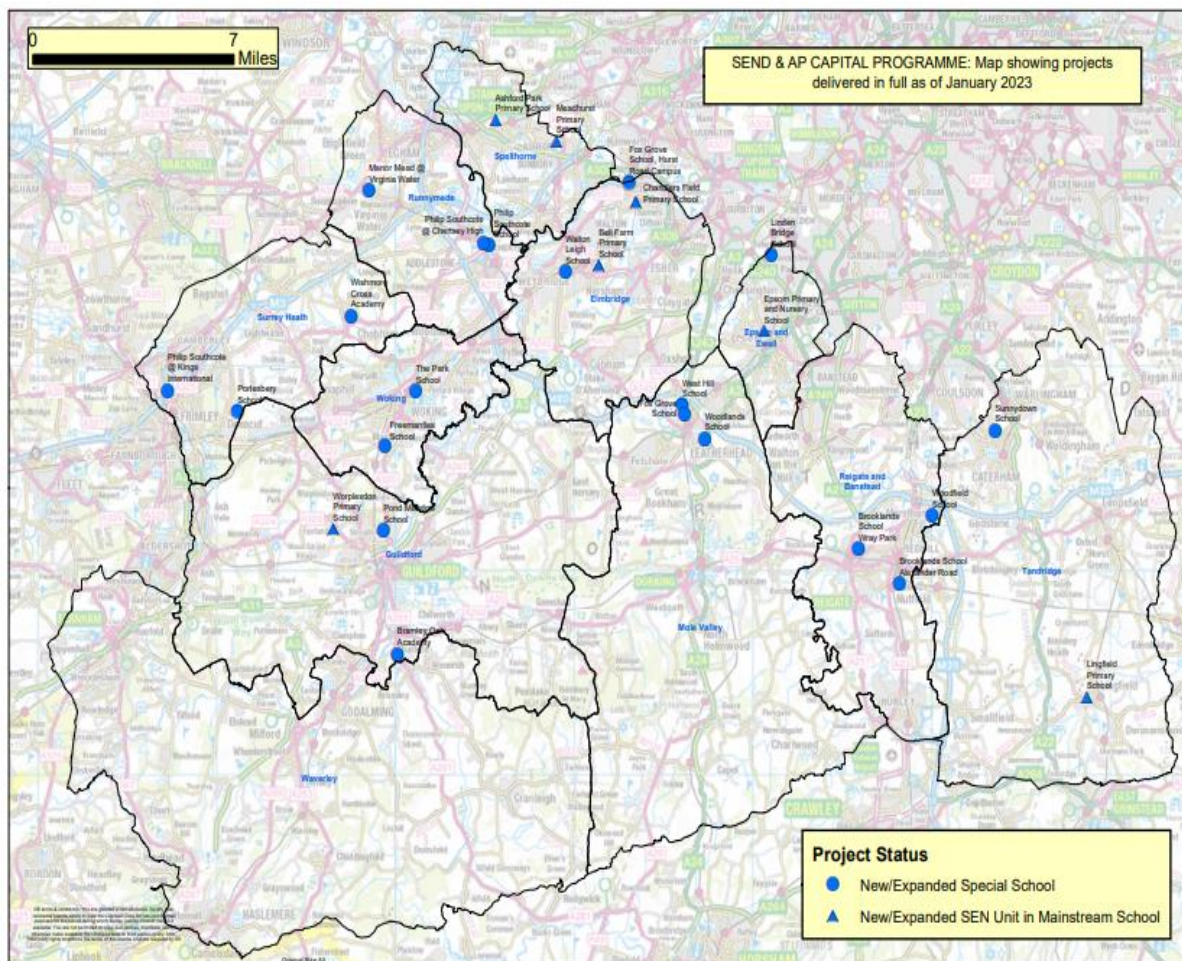
[SEND Capital Programme Phase 3 Cabinet Decision 26-Jan-2021](#)

[SEND Capital Programme Phase 4 Cabinet Decision 25-Jan-2022](#)

[Surrey SV agreement \(publishing.service.gov.uk\)](#)

[Surrey Inclusion and Additional Needs Strategy \(2023 to 2026\) - Partnership | Surrey Local Offer](#)

Appendix A: SEND Capital Programme Projects Delivered 2019-2022



SEND Capital Programme: Specialist Schools

1. Woodfield School bulge class 2019
2. Linden Bridge School bulge class 2019
3. Philip Southcote School bulge class 2019
4. Freemantles School bulge class 2019
5. Pond Meadow School bulge class 2019
6. Brooklands School, Wray Park campus bulge class 2019
7. Walton Leigh School bulge class 2019
8. Fox Grove School temporary accommodation, Hurst Road campus 2021, prior to DfE delivery of Fox Grove School
9. Sunnydown School Changing Rooms 2021
10. Philip Southcote School relocation of Post 16 provision 2021
11. Philip Southcote School Satellite Site, Chertsey High School campus 2021
12. Philip Southcote School Satellite Site, Kings International College campus 2021
13. Woodlands School temporary accommodation & adaption plus external works 2021
14. Bramley Oak Academy adoptions for additional places 2021
15. West Hill Academy expansion Part 1 2021
16. Manor Mead School Temporary Expansion Arrangements (2021-2023), Virginia Water campus Part 1 2021
17. Wishmore Cross Academy expansion 2021 and MUGA 2022
18. The Park School access adoptions for additional places 2021
19. Brooklands School expansion, Alexander Road campus 2022
20. Philip Southcote School main site expansion temporary accommodation 2022
21. Freemantles School expansion temporary accommodation/ Pods 2022
22. Manor Mead School Temporary Expansion Arrangements (2021-2023), Virginia Water campus Part 2 2022
23. Matthew Arnold School Temporary Expansion Arrangements (2022-2024), Hurst Road campus 2022
24. Matthew Arnold School Temporary Expansion Arrangements (2021-2023), Ripley campus 2022
25. Portesbery School expansion Part 1 external works 2022
26. Wishmore Cross Academy expansion MUGA 2022
27. West Hill Academy expansion Part 2 2022

SEND Capital Programme: SEN Units in mainstream schools

28. Bell Farm Primary School 2020 (New)
29. Worplesdon Primary School 2020 (New)
30. Meadhurst Primary School Part 1 Redesignation 2021
31. Chandlers Field School 2021 (New)
32. Ashford Park Primary School temporary accommodation 2022
33. Epsom Primary & Nursery School 2022 (New)
34. Lingfield Primary School Access Adaptions 2022

Appendix B: SEND Capital Programme 2023/24 Delivery Tranche

School	SEND Capital Strategy	Project	Additional Places	Planning	Target Delivery
Epsom Primary School	Phase 4	New SEN Unit	21	N/A	Aug 22 (delivered)
Bramley Oak Academy (Part 1)	Phase 4	Specialist School expansion	49	Permitted Development	Aug 23 (LSEAT Self-Delivery)
Bramley Oak Academy (Part 2)				Full Application	Aug 24
Philip Southcote School (Post 16 Provision)	Phase 2	Specialist School expansion	30	Permitted Development	May 23
Philip Southcote School (Pre 16 Provision)	Phase 2	Specialist School expansion	26 (and reprovision of 24 existing places)	Full Application	Aug 24
The Abbey School	Phase 2	Specialist School expansion	60	Full Application	Jun 24 (Weydon MAT Self-Delivery)
Portesbery School (Part 1)	Phase 3	Specialist School expansion	8 (and reprovision of 10 existing places)	Permitted Development	Aug 23
Freemantles School	Phase 1	Specialist School expansion	72 (and reprovision of 54)	Full Application	Oct 23
Woodfield School	Phase 2	Specialist School expansion	60	Full Application	Aug 23
Stepgates Community School	Phase 4	SEN Unit expansion	8 (and reprovision of 21)	Full Application	Aug 23
Woodfield School @ Carrington School	Phase 4	Specialist School expansion (satellite site)	40	Permitted Development	Dec 23
Dovers Green School	Phase 4	SEN Unit expansion	8 (and reprovision of 16)	Permitted Development	Aug 23
St Matthews C of E Primary School	Phase 4	SEN Unit expansion	13	Permitted Development	Aug 23
Hythe Primary School	Phase 4	SEN Unit expansion	16	Permitted Development	Dec 23
Ashford Park Primary School	Phase 4	SEN Unit expansion	4 (and reprovision of 21)	Permitted Development	Aug 24
Woking High School	Phase 4	SEN Unit expansion	8	Permitted Development	Aug 23
Brooklands College (Part 1)	Phase 4	New Post 16 SEN Unit	30	Permitted Development	Aug 23
Philip Southcote School @ Epsom & Ewell High School	Phase 4	Specialist School expansion (satellite site)	20	N/A	Aug 23
Epsom Downs Primary School	Phase 4	New SEN Unit	25	Permitted Development	Aug 23
Hopescourt School	Phase 1	New Specialist Free School	200	Full Application	Jul 24

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SURREY COUNTY COUNCIL**CABINET****DATE: 28 MARCH 2023****REPORT OF CABINET MEMBER: MATT FURNISS, CABINET MEMBER FOR TRANSPORT, INFRASTRUCTURE AND GROWTH****CLARE CURRAN, CABINET MEMBER FOR EDUCATION AND LEARNING****LEAD OFFICER: MICHAEL COUGHLIN, EXECUTIVE DIRECTOR FOR PARTNERSHIPS, PROSPERITY AND GROWTH****SUBJECT: 'PATHWAYS TO EMPLOYMENT: SUPPORTING SURREY RESIDENTS' SKILLS DEVELOPMENT AND EMPLOYABILITY****ORGANISATION STRATEGY PRIORITY AREA: GROWING A SUSTAINABLE ECONOMY SO EVERYONE CAN BENEFIT, THRIVING COMMUNITIES, NO-ONE LEFT BEHIND****Purpose of the Report:**

This report sets out a programme of work that follows on from and supplements the recently launched Surrey Skills Plan and the upcoming Lifetime of Learning education strategy and includes additional key operational activity that will support the ambitions of both these documents as well as delivering on multiple outcomes across educational equity, economic growth and opportunity for all.

The proposed approach and model for delivery, includes:

- 1) The development of enhanced employment and careers guidance and advice in schools, which align with our Surrey Skills Plan ambitions and wider corporate activity, such as Growing a Sustainable Economy from which everyone can benefit and No One Left Behind
- 2) Greater support for those who already are or are at risk of not being in employment, education or training (NEET)
- 3) Greater engagement of employers in designing and delivering employment and skills activity in schools and through a wide range of events

The report sets out the rationale for this approach and how all three aspects will be delivered, the funding and resource implications and the overall benefits they will deliver to residents, businesses and our economy.

Recommendations:

It is recommended that Cabinet:

1. Endorses the focus on local recruitment, skills development and career support for all ages and notes that this programme of work aligns with the planned Lifetime of Learning Strategy as well as the Surrey Skills Plan.

2. Endorses the approach for SCC to further explore taking on new responsibilities related to schools-focused careers advice and guidance in line with recognition of the need to operate on a Surrey County geography, subject to the appropriate funding being in place.
3. Notes that the approach will be enhanced by 'all-age' interventions where appropriate to reflect the challenges around recruitment and the data on economic inactivity, subject to a transformation funding business case.

Reason for Recommendations:

Currently, employment, skills and careers activity is delivered through a number of organisations, in a complex skills landscape. The County Council taking greater ownership of this agenda through a stronger lead and co-ordinating role, and in some cases responsibility for direct delivery, will allow us to ensure that services, support, and activity has better alignment with our strategic priorities, whilst also delivering greater impact and improved outcomes for residents and businesses. This would enable more and better targeted support to be provided for those individuals who need it the most, as well as addressing the barriers to economic growth which are being encountered by Surrey's employers, who are keen to be more involved in designing and delivering local solutions.

Executive Summary:

Strategic context

1. Developing the County Council's role within the skills system presents an opportunity to positively impact across a number of our core strategic priorities. In view of its county-wide perspective, access to Surrey-wide, as well as more local data and intelligence and close relationships with a wide variety of local organisations, agencies and bodies, the County Council is well-placed to understand the inequalities that exist within the county and fully recognise that skills, careers activity and supporting people into employment not only helps grow a sustainable economy so everyone can benefit, but can also reduce health inequalities and empower communities.
2. Within 'Surrey's Economic Future' the Economic Strategy approved by Cabinet in December 2020, Priority one, 'Growing our leading edge' recognises the strong business base that Surrey has and the importance of removing barriers to sustaining and growing that base - access to a skilled workforce is central to achieving that ambition. Priority three centres on 'Maximising opportunities within a balanced economy.' This priority recognises that everyone in Surrey should be able to benefit from the economic success of the county - access to skills has a key role in supporting residents to take up the economic opportunities presented.
3. The skills system at a national and local level involves a wide range of partners with both aligned and competing priorities. In Surrey, this situation has been further exacerbated by the fact that the county is served by two different Local Enterprise Partnerships (LEPs). This means when government departments (including the Department for Education) have been contracting key programmes of work via LEPs, such as careers support, the whole-Surrey perspective has been absent, and the

specific interests of Surrey businesses and residents have not been holistically represented.

4. A key priority of the Surrey Skills Plan is to address this issue through supporting our businesses and our residents and enabling collaboration to ensure we have a future-proofed skills system. Central to these ambitions is the opportunity to support businesses who are struggling to find the talent, skills and workforce needed through greater, facilitated, engagement with the providers of this talent; primarily schools, FE and sixth form colleges, universities, independent training providers (ITPs) and adult learning providers.
5. Through work with the Surrey Business Leaders' Forum, the Surrey Chambers of Commerce and arising from strategic business relationships, we know that businesses across every sector and at every skill level are facing significant recruitment challenges. Whilst Surrey is correctly regarded as a high employment, high-skilled economy (54% degree qualified compared to 43% UK average), the higher concentration of high-skilled occupations (51% higher than national average) can exacerbate the frequently reported skills gaps for intermediate and lower-skilled occupations. Demand far outstrips supply in Surrey's foundation sectors, particularly in terms of personal care, nursing, restaurant operations and warehousing.
6. Across our leading-edge sectors (professional services, Artificial Intelligence (AI), Digital and Data, Aviation and Aerospace, Healthcare and Life Sciences, innovative advanced manufacturing) skills gaps are particularly acute at senior levels where replacement demand is an increasingly pressing issue for knowledge-intensive jobs. For instance, sectors such as cyber security have been finding it difficult to employ those with the right technical skills, with employers expressing that related courses are failing to keep track of latest industry and technological changes, contributing towards graduates lacking specific, up-to-date knowledge. In addition, employers report that many students are not being inspired, supported or guided at the right and/or early age to consider working in such sectors as a viable and attractive potential future career. Business employers speak of the demonstrable need to better connect the education, training, and skills sector with the businesses to better address the barriers that can exist between them, be that in terms of access, language or culture.
7. Evidence suggests that many individuals, particularly those who face barriers to employment, find it hard to both enter and progress through a system which is primarily set up for a linear academic pathway into a recognised career. More still needs to be done to promote vocational routes and whilst legislation is now in place to put vocational training providers on an equal footing with their academic peers, we know from work around apprenticeships that the cultural mindset in terms of how well that pathway is respected can be harder to shift.
8. In terms of educational equity, the County Council works closely with schools, colleges, training providers and workplaces to ensure that sufficient provision exists to enable all young people aged 16–19 (and up to 25 for some young people with special educational needs and disabilities) to engage in education and training. It is widely acknowledged that educational achievement is a helpful contributor to a young person's wider health, well-being and social mobility. The County Council is committed

to supporting young people to participate in education, training and employment by ensuring further education and skills provision within Surrey enables young people to overcome barriers and equips them with the necessary knowledge, qualifications and skills to progress from education into the workforce.

9. At a national level, there was a sharp increase in the number of young people aged 16 to 24 years and classified as NEET in October to December 2022 with the total currently estimated to be 788,000 up from 724,000 in July to September 2022. The percentage of all young people who were NEET in October to December 2022 was estimated at 11.5%, up 0.9 percentage points on the quarter (July to September 2022), and up 0.5 percentage points compared with pre-coronavirus (COVID-19) pandemic levels (October to December 2019).
10. At a Surrey level, as of 26th February 2023, Surrey County Council records show a 11.4% combined rate (10.3% activity not known and 1.1% NEET). It should be noted that our data is impacted by a recent move to “single view of a child” system. This system has drawn together multiple databases, and this has identified some data quality issues which the team is working through at pace.
11. However, whilst the data is important, the impact that time spent NEET can have on an individual is of equally important consideration. Studies have shown it can have a detrimental effect on both physical and mental health, including elevated risk of mortality and hospitalisation and mental health issues. Additionally, disengagement from employment and education during the transition from school to work can increase the likelihood of unemployment, low wages, or low quality of work later in life.

Operational delivery

12. To bring about the step change in outcomes for both businesses and residents by addressing the above issues, it is proposed that the County Council:
 - a. Explore with partners the opportunity to develop an enhanced careers support function via a direct delivery model that aligns with and supports our Surrey Skills Plan ambitions and wider corporate activity, such as No One Left Behind
 - b. Develops an enhanced educational equity function that supports more young people to overcome barriers that enable them to remain in or enter education, employment, or training.
 - c. Engages employers to a greater extent in designing and delivering employment and skills activity in schools, including through a wide range of events.

A. Support with careers advice and guidance

13. Currently, careers advice, information and guidance (CAIAG) is delivered within schools and colleges and supported by Careers Hubs. These Hubs bring together schools, colleges, employers, and apprenticeship providers in local areas across England. Their stated goal is to make it easier for schools and colleges to improve how they prepare young people for their next steps. Careers Hubs drive progress against

the Gatsby Benchmarks¹ by enabling schools and colleges and their Careers Leaders to access training and support, and to collaborate in a focussed way, bringing together best practice and local labour market insight. The Hubs offer schools and colleges dedicated support from the local hub team and facilitate partnerships with key employers committed to improving careers across an area.

14. In Surrey, the Hubs are delivered by Enterprise M3 and Coast to Capital LEPs through a contract with the Careers and Enterprise Company (CEC), the national body for careers education, set up by the Government in 2015. Through this contract, the Hubs deliver a range of activities focused around developing the capability and capacity of careers education with schools and colleges. This activity includes training and supporting Careers Leaders, bringing employers, educators and providers together and sharing digital tools and resources.
15. Whilst the Hubs provide a valuable service in Surrey, there are a number of difficulties that come with two providers delivering a service across the county. There is little alignment or practical co-ordination between the two services, with different priorities and approaches, meaning there can be a 'postcode lottery' in terms of the type and quality of careers support experienced by schools and colleges. Not all schools are covered and there is a tendency to support the schools who have the capacity and capability to do more; these are often not the schools who need the greatest level of support.
16. In line with our ambitions to take a more active role in the skills system, alongside our wider corporate ambitions around lifetime of learning and leaving no one behind, discussions and an exploration of the possibility of assuming a stronger, enhanced role, including potentially having responsibility for careers support and guidance across Surrey, have been instigated with key partners in this arena.
17. Were this to be progressed it would enable a number of other benefits, including:
 - Alignment with our upcoming Lifetime of Learning strategy, enabling us to bring our strong relationship with schools to bear on the service.
 - Alignment with our strong and developing work with local Surrey employers, reflecting our key sectors and industry sectors we work closely with, such as health and social care.
 - Ability to build on the relationships we have with Surrey skills providers, including FE Colleges, independent training providers and Surrey Adult Learning, as evidenced by the proactive approach we have taken to the Surrey Skills Plan.
 - Placing responsibility for all the above within one sovereign, democratically mandated organisation and leadership team.
 - Enabling closer links between the Careers Hub and the work done to support SEND schools.
 - Reflecting our intentions in the discussions we are anticipating having with the Government on our County Deal for Surrey, especially in relation to Adult Education Budgets and skills.

¹ Gatsby benchmarks define what world class careers provision in education looks like and provide a clear framework for organising the careers provision at school or college. The benchmarks are enshrined in statutory guidance.

- A more focused, unified, co-ordinated county-wide approach to this work would provide young people with an informed choice about their future career options and next steps, presenting a wider range of opportunities and routes to employment and meaningful work.

18. In order to track, monitor and assess the achievement of the above, a range of standard Key Performance Indicators (KPIs) applicable to careers services, would be used and reported on a regular basis (e.g., number of schools involved, recruitment and deployment of key staff)

19. Given the current arrangements for the delivery of Careers Hub work and the contracts held in Surrey by the Enterprise M3 and Coast to Capital Local Enterprise Partnerships with the Careers and Enterprise Company, it is worth noting the announcement made in the Government's Budget on 15 March, as follows: *"The government is committed to empowering democratically elected local leaders at every opportunity. To this end, the government intends for the functions of Local Enterprise Partnerships (LEPs) to be delivered by local government in the future. Therefore, the government is minded to withdraw central government support for LEPs from April 2024. DLUHC and the Department for Business and Trade will now consult on these proposals, before confirming a decision. The government will publish an updated policy position to confirm next steps by the summer."*

20. This will be taken into account, especially the emerging and confirmed policy position reached by the summer, as discussions continue with key stakeholders, including both LEPs.

B. Educational Equity

21. Whilst the exploration of delivering an enhanced careers support and guidance function will be the central plank of our *Pathways to Employment* model, we recognise that we need to do more to support our young residents who are living in a challenging socio-economic or family environment and/or are living within some of our deprived neighbourhoods. We know that an attainment gap by age 19 is seen amongst those in Surrey claiming free school meals (FSM), compared to their peers. At both Key Stage 2 (including and excluding English and maths) and Key Stage 3, the gap is greater than that seen nationally. In a prosperous county such as Surrey, it is only right that all the relevant partners come together to tackle this so that no-one is left behind.

22. SCC's existing Year 11-12 Transition Service is already working with 500 young people at risk of becoming NEET. It provides a high-quality preventative service and support but is limited by the capacity of the team meaning only signposting activity is possible for NEETs aged 16 and 17. Part of the Transformation funding business case being built is to deliver greater investment into the team for four more Personal Advisors, enabling us to do more to increase vocational links with business, especially in targeted key sectors, reflect the breadth of routes into employment and develop partnerships with businesses to enhance employment opportunities. Overall, the service will be able to provide intensive support to a further 350 vulnerable young people identified as NEET, with the ambition to move 85% of those into a positive destination.

C. Education and business

23. The world of work is changing rapidly and the skills system, particularly access to careers advice, needs to adapt to facilitate business needs. The interface between employers, potential employees and skills provision is currently failing business by not being responsive and adaptable enough to their needs. The opportunities that vocational routeways present are not being explored fully with academic pathways taking priority, often to the detriment of the learner. Enhancing the opportunities for vocational activity provides improved options for addressing outcomes for young people not achieving their full potential, whilst employers want to be better integrated and involved in the system to help shape it to achieve better outcomes.
24. To help support a co-ordinated approach to employer engagement in skills work, it is proposed to recruit an Employer Engagement Enterprise Co-ordinator. The purpose of this role would be to establish new strategic partnerships between employers and schools that will deliver mentoring support, work taster days, work experience, careers talks and careers events for parents. They would also share responsibility for delivery of a Festival of Skills, a series of events bringing employers and education closer together, primarily aimed at younger learners but also with specific events to inspire older re-trainers, those returning to work and the economically inactive (including those who retired early).
25. The ambition would be to seek commitment to engage 200 additional businesses utilising our growing network of businesses we engage with and deliver employment related opportunities from 25% of these engagements. By having greater ownership of the facilitation of the relationship between employers and education, we can also ensure more strategic alignment with our ambitions, such as delivering more focused and positive outcomes for those at risk of being left behind or building better connections between the work of training providers, such as Surrey Adult Learning, and our business community.

Consultation:

26. This approach went to a joint informal session of the Communities, Environment and Highways and the Children, Families and Lifelong Learning Select Committees on 6 March.
27. Discussions have been held with the Careers Enterprise Company and both LEPs in Surrey exploring alternative models for careers support and guidance in Surrey.

Risk Management and Implications:

28. There are a number of risks associated with playing a greater role in careers support and guidance, including:

Risk	Mitigation
SCC having responsibility for only part of Surrey.	Continued dialogue with partners regarding opportunity to take on delivery on a pan-Surrey basis.
Funding is inadequate to meet service costs	Develop a range of approaches of how service could be delivered with less funding.

Securing Transformation funding for three years	Strength of business case results in funding being made available
Securing longer term funding to continue delivering after Transformation funding	Start preparing for this transition from year 2 of delivery.

Financial and Value for Money Implications:

29. A full business case for three years of transformation funding is being developed to support delivery of these ambitions and address all liabilities. This includes staffing costs to deliver an enhanced careers function and the Educational Equity strands as well as wider costs, such as delivering events, a skills portal to provide online support and discretionary costs such as travel support for schools and young people to attend engagement opportunities.
30. In the event that this is not approved in part or in whole, funding the costs of a reduced careers support service would be prioritised to be met from existing budgets in the 2023/24 MTFS, estimated to be £0.15M, with the potential for match funding.
31. If the business case is approved, annual reviews will be undertaken to assess the impact of the work and determine the viability of future programmes. After three years of initial transformation funding, subject to progress and the achievement of objectives, costs would be factored into mainstream budgets. However, it is our expectation that there are likely to be opportunities for other funding sources for this type of skills and employability support in line with future devolution, which would mitigate the direct costs to the Council.

Table 1: **Possible** costs of proposal and funding sources

	SCC additional funding £000	Potential Match Funding £000	Total £000
Hubs	145	275	420
Transition Team Enhancement	250		405
Skills Portal, discretionary costs, events and marketing	255		100
Total	650	275	925

Section 151 Officer Commentary:

32. Although significant progress has been made to improve the council's financial position, the financial environment remains challenging. The UK is experiencing the highest levels of inflation for decades, putting significant pressure on the cost of delivering our services. Coupled with continued increasing demand and fixed Government funding this requires an increased focus on financial management to ensure we can continue to deliver services within available funding. In addition to these immediate challenges, the medium-term financial outlook beyond 2022/23 remains uncertain. With no clarity on central government funding in the medium term, our

working assumption is that financial resources will continue to be constrained, as they have been for the majority of the past decade. This places an onus on the council to continue to consider issues of financial sustainability as a priority in order to ensure stable provision of services in the medium term.

33. The proposal to take on the Careers Hub activity is subject to a full Transformation business case and will not proceed until funding is secured. There will need to be further work to establish the financial implications of implementing the proposals. The additional responsibilities are subject to securing CEC match funding as well as Transformation funding and in the longer term would need to be factored into the Medium-Term Financial Strategy as part of future budget planning processes. As such, the Section 151 Officer supports the recommendations.

Legal Implications – Monitoring Officer:

34. There are no legal implications to note at this point.

Equalities and Diversity:

35. The potential activity outlined is agnostic of protected characteristics.

Other Implications:

36. The potential implications for the following council priorities and policy areas have been considered. Where the impact is potentially significant a summary of the issues is set out in detail below.

Area assessed:	Direct Implications:
Corporate Parenting/Looked After Children	We closely monitor the number of care leavers who are NEET and this approach could offer more support and opportunities for that group.
Compliance against net-zero emissions target and future climate compatibility/resilience	Due to increased staff travel to visit schools and employers, this might have a negative impact on the Economy & Growth’s contributions to net-zero emissions target. We will look to mitigate this wherever possible with use of public transport and virtual meetings.

What Happens Next:

37. Further work in conjunction with the Transformation Support Unit on the business case and decisions around funding for an enhanced careers support and educational equity function.
38. Continued discussions with both Local Enterprise Partnerships and the Careers and Enterprise Company on the implications of the Chancellor’s Budget statement in respect of LEPs and the potential opportunity for the County Council to play an enhanced role in careers support and guidance in the future.

Report Author: Jack Kennedy, Head of Economy and Growth, 07790 773496

Sources/background papers:

- The Surrey Skills Plan
(<https://investinsurrey.co.uk/wp-content/uploads/2022/10/Surrey-Skills-Plan-12.10.22.pdf>)
 - 'Surrey's Economic Future to 2030 - Economic Strategy Pages 39 – 66 of the 151221 Cabinet papers
 - Surrey's demand for jobs research (Shared Intelligence 2021 and Metro Dynamics 2022)
 - Surrey's provision mapping (Metro Dynamics 2022)
 - SCC's No One Left behind Employment and Skills Research (2022 ongoing)
 - Growth Board Papers are available at Invest in Surrey
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SURREY COUNTY COUNCIL**CABINET****DATE: 28 MARCH 2023****REPORT OF CABINET MEMBER: CLARE CURRAN, CABINET MEMBER FOR EDUCATION AND LEARNING****LEAD OFFICER: LIZ MILLS, DIRECTOR EDUCATION AND LIFELONG LEARNING****SUBJECT: LOCAL GOVERNMENT AND SOCIAL CARE OMBUDSMAN PUBLIC REPORT REGARDING CONCERNS ABOUT THE DELIVERY OF EDUCATION FOR CHILDREN WITH ADDITIONAL NEEDS AND DISABILITIES (SEND)****ORGANISATION STRATEGY PRIORITY AREA: EMPOWERING COMMUNITIES****Purpose of the Report:**

The Ombudsman has found the Council to be at Fault for the following reasons:

- The provision set out in the child's EHCP was not fully met between September 2020 and March 2022. This meant that the child missed out on a significant amount of education and therapy provision during this period.
- The Council did not adhere to the specifics of the two-tier Corporate Complaint Process. This delayed the consideration of the complaint and the complainant's ability to escalate the complaint to the Ombudsman.
- As the Ombudsman has found that maladministration causing injustice has occurred, under Section 31(2) of the Local Government Act 1974, the report must be laid before the authority concerned. The Ombudsman welcomed the Council's willingness to reflect on his findings to inform future improvements.
- The Council has accepted the recommendations of the Ombudsman. The Council will pay a total of £5400 for the educational benefit of the young person and a further £2000 for distress, uncertainty, time and trouble for the complainant in pursuing the complaint. It will also apologise to the family and review its procedures for arranging and monitoring the delivery of provision within an EHC Plan as well as reviewing the complaint handling procedures within the CFLL Directorate.

Recommendations:

It is recommended that Cabinet:

1. Consider the Ombudsman's report and the steps that will be taken by the Service to address the findings, and
2. Consider whether any other action should be taken.
3. Note that the Monitoring Officer will be bringing this report to the attention of all councillors.

Reason for Recommendations:

There is a statutory requirement for the Monitoring Office to bring to Members' attention any public report issued by the Ombudsman about the Council which identifies it is at fault and has caused injustice as a result.

Executive Summary:

1. The Local Government and Social Care Ombudsman has investigated a complaint made by a parent of a child with additional needs and disabilities. A report into the investigation will be published by the Local Government and Social Care Ombudsman. The identity of the family in question is not made publicly available.
2. Mrs X complained the Council failed to deliver provisions set out in her son, Y's, Education, Health and Care plans between September 2020 and March 2022. It also handled her complaint poorly. She says Y missed out on special educational provisions as a result which have impacted on his education and caused her and her son distress. She wants the Council to acknowledge its failings and provide a financial remedy for the lost special educational provision, the distress caused to her and Y and poor complaint handling. She also wants the Council to improve its services.
3. Mrs X's son, Y, has special educational needs and an Education, Health and Care plan (EHC plan). In September 2020, his plan included the following special educational provisions:
 - 15 hours tutoring a week;
 - 1 hour speech and language therapy a week with a termly review;
 - occupational therapy – weekly sessions, a sensory diet programme and daily implementation of an occupational therapy programme;
 - a personal learning plan including education and therapeutic input, with a termly multi-disciplinary review.
4. Mrs X was unhappy with the content of the plan and appealed to the SEND Tribunal. Mrs X says between September 2020 and January 2021, Y received 4 hours tuition a week. Between February and July 2021, he received 6 hours a week. The Council has not provided any evidence to show it offered more tuition or that Y received more tuition than this during this time.
5. The SEND Tribunal heard the case in April 2021 and ordered the Council to include the following provisions in Y's plan:
 - 25 hours tutoring a week; provision of an occupational therapy (OT) programme.
 - 18 hours a year of speech and language therapy.
 - weekly non-directive therapeutic provision e.g., animal therapy.
6. The Council amended the EHC plan in line with the Tribunal order and issued the final plan in mid-May 2021.
7. Mrs X complained to the Council in June 2021. She said the Council had failed to provide education and deliver provisions in Y's plan since September 2020 and despite the Tribunal's order, provision listed in the May 2021 final plan was still not in place. She said that the provisions set out in the September 2020 EHC plan were not met.

8. The Council told Mrs X it would not consider her complaint at that time as she had another complaint currently being considered by us. It told her it was putting the complaint "on hold".
9. In July and August 2021, the Council worked to get provision in place. By the beginning of September, Y was receiving the 25 hours tutoring, OT provision and some speech and language therapy. Mrs X complained that Y was still not receiving all the provisions in his plan. She said the animal therapy and some speech and language therapy was still not in place.
10. At the end of September, the Council wrote to Mrs X. It said it had now agreed to fund 18 hours of speech and language therapy and that the animal therapy could start. In its response to our enquiries, the Council said this email was its stage 1 complaint response. However, the email did not indicate that it was a formal complaint response, nor did it tell Mrs X of her right to request a stage 2 investigation, if she remained dissatisfied. The Council said it closed her complaint in October as it did not hear from Mrs X after this email.
11. In November 2021, Mrs X contacted the Council to say Y had been unable to engage with his occupational therapist and she felt he needed a different therapist. She also said the animal therapy sessions still had not begun
12. The OT provider contacted the Council to say Mrs X had asked it to be involved in termly multi-disciplinary meetings as this provision was in Y's EHC plan. It said the Council had not asked for this and so it was not covered in the original quote. It set out its quote for it to attend 3 multi-disciplinary meetings a year and asked the Council to approve the additional funding. The Council did not respond to this request.
13. In December 2021, the OT provider told the Council it could no longer deliver Y's provision. It said Y had struggled to engage with his therapist. Mrs X had asked if he could be allocated a different therapist, but they did not have an alternative therapist available.
14. As part of its feedback to the Council, the OT provider said the Council had not funded any hours for multi-disciplinary meetings. Because of this, it had been unable to liaise with other professionals working with Y to learn and share what worked for him. If they had been able to do this, it might have helped them understand better how they could engage him.
15. Between December 2021 and February 2022, the Council says it contacted 10 other OT service providers, but none had capacity. In February 2022, Mrs X asked the Council for an update on the OT provision and the animal therapy. She said the animal therapy provider had told her it could begin several weeks ago, and she did not know why this had not started. The Council said it had sent the provider some finance forms in September 2021, but the provider had not returned them. It said it would work to resolve the issue. Y began attending animal therapy sessions in March 2022.
16. In March 2022, Mrs X re-submitted her June 2021 complaint to the Council. In addition to the issues raised in June 2021 she said:
 - delays in agreeing the funding for therapies during Summer 2021 had led to difficulties co-ordinating the provision, even though the Council was dutybound to deliver all the provisions set out in the EHC plan as ordered by the SEND Tribunal.
 - she was unsure why the Council did not investigate her complaint in June 2021, as the ongoing Ombudsman investigation related to an earlier time period. The Council had then closed her complaint during Autumn 2021 without telling her, which had delayed any meaningful resolution to the issues raised; and

- Y did not receive any animal therapy between May 2021 and March 2022.

- 12
17. In April 2022, the Council told her it had considered her complaint at stage 2 of its complaint's procedure. It said it had decided to ask the local service to provide a more detailed response, as it had not yet fully considered the issues raised at stage 1. The Council provided an additional complaint response in May 2022. It accepted there had been a delay setting up the animal therapy and offered her £300 to recognise this. It said it had tried to get another OT provider in place, after Y's provider withdrew in December 2021. However, it had not been able to find a replacement. It accepted it had not delivered all Y's educational and therapeutic provision. It said it had offered her a financial remedy for lost provision after its stage 2 response.
 18. Mrs X responded and said the remedy offer it referred to was made after a previous complaint she made about lost special educational provision before April 2020. The Council told her it had completed its consideration of her complaint and she could bring her complaint to us if she remained dissatisfied. Mrs X brought the complaint to us in May 2022.
 19. The LGSCO previous investigation found that the Council had failed to provide Y with a substantial amount of education between March 2018 and April 2020, causing him a significant injustice. The Council agreed to pay Y £1,000 to recognise the distress caused and Mrs X £600 for distress and time and trouble in bringing her complaint. The LGSCO finds that the faults identified in this investigation follow on consecutively from the previous investigation and have caused Y a significant additional, and compounded injustice for support he was entitled to receive by law. Mrs X has also been caused a significant additional injustice bringing this further complaint on his behalf.
 20. The Council has accepted the outcome of the Ombudsman's investigation as follows:
 - Injustice caused to Y by lost hours of education and therapy provision between September 2020 and March 2022. The Council has agreed to pay £5400 to be used for Y's educational benefit.
 - Impact of the faults identified and injustice to Mrs X as well as Y. The Council has agreed to pay £1000 to recognise the frustration and distress caused over a prolonged period (September 2020 to May 2022) as a result of the faults identified.
 - Impact of poor complaints handling, specifically around learning from complaints because this is the second time she has had to complain to us about very similar matters;
 - Impact of the distress caused by the lost provisions and the enduring nature of the Council's failure to provide suitable education and special educational provisions for him between September 2020 and March 2022. The Council has agreed to pay £1000 to Y to remedy the enduring injustice resulting from the Council's failures since 2018, as set out in this report and the previous decision issued by the LGSCO.
 21. The Council has also agreed to:
 - review its procedures for how it arranges and monitors delivery of provisions in the EHC plans of its children and young people that it is under a nondelegable duty
 - review its children's and education services complaints handling processes to ensure complaints are investigated in line with its policy. It should ensure all

complaint response letters make it clear whether they are a stage 1 or stage 2 response and tell the complainant what to do if they remain dissatisfied following the response. It should also provide evidence it has reminded its staff of this need to be clear and follow the correct complaints process.

Consultation:

22. The Chief Executive and S151 Officer have been consulted on this report in accordance with the statutory requirements.

Risk Management and Implications:

23. The Ombudsman findings highlight service failures that caused injustice to a vulnerable child and his family. Staff training will be delivered to prevent a recurrence of these issues.

Financial and Value for Money Implications:

24. The Council will pay £7,400 to the family as recommended by the Ombudsman. Despite being linked to spend within SEND, as a compensation payment this is to be funded from the General Fund.

Section 151 Officer Commentary:

25. Although significant progress has been made to improve the Council's financial position, the financial environment remains challenging. The UK is experiencing the highest levels of inflation for decades, putting significant pressure on the cost of delivering our services. Coupled with continued increasing demand and fixed Government funding this requires an increased focus on financial management to ensure we can continue to deliver services within available funding. In addition to these immediate challenges, the medium-term financial outlook beyond 2022/23 remains uncertain. With no clarity on central government funding in the medium term, our working assumption is that financial resources will continue to be constrained, as they have been for the majority of the past decade. This places an onus on the Council to continue to consider issues of financial sustainability as a priority in order to ensure stable provision of services in the medium term.
26. The Section 151 Officer supports the payments in line with the recommendations of the Ombudsman.

Legal Implications – Monitoring Officer

27. The Ombudsman has made a finding of fault (described in law as maladministration) causing injustice. The inadequacies identified include failures on the part of Children's Services to comply with statutory duties placed upon them. The Local Government and Housing Act 1989 places a duty on the Monitoring Officer to report these findings to the Cabinet and draw his report to the attention of each Member of the Council.
28. Ombudsman's recommendations are not legally enforceable although it is extremely unusual for an authority not to accept them. In this instance Officers have accepted the findings of the Ombudsman, agreed to pay the amounts recommended as compensation and have agreed to make an apology

Equalities and Diversity:

29. The Council must have due regard to its equality duties under the Equality Act 2010 and to consider the impact of its decisions and actions on individuals with protected

characteristics. Particularly relevant here are the characteristics of disability and age (in so far as this concerns a young person with special educational needs). The duties relating to special educational needs are enshrined in law to ensure that such children get the support that they require to help them with their education. Members will no doubt wish to consider whether there are any other lessons to learn to avoid any future similar adverse impact on children with disabilities, those who care for them and their families. The potential implications for the following council priorities and policy areas have been considered.

Other Implications:

30. The potential implications for the following council priorities and policy areas have been considered. Where the impact is potentially significant a summary of the issues is set out in detail below.

Area Assessed	Direct Implications
Corporate Parenting/Looked After Children	No significant implications arising from this report
Safeguarding responsibilities for vulnerable children and adults	No significant implications arising from this report
Environmental sustainability	No significant implications arising from this report
Public Health	No significant implications arising from this report

What Happens Next:

31. An apology letter was sent to the family on 30 January 2023.
32. The request for the financial remedy to be paid was shared with Financial Services on 24 January 2023 and payment made on 30 January 2023.
33. In addition to an internal audit review completed in December 2022, the CFLL Customer Relations Team has arranged further training by the LGSCO for all officers who respond to complaints to ensure they are familiar with the process, including the different requirements at each stage. Dates have been booked through to May 2023.
34. The CFLL Customer Relations Team have also designed and delivered specific training to the Inclusion & Additional Needs Leadership Team for handling complaints in a way that leads to service improvement. The training slides are attached alongside this report.
35. CFLL services have also initiated a Customer Relations steering group with representatives from Customer Relations, Communication Services, and Inclusion & Additional Needs, in order to identify, pre-empt and respond to key themes in complaints.
36. Service managers from across ELL services (Children not in School, SEND Systems & Planning, Education & Inclusion) have together undertaken a review of the procedures for arranging support under EHC plans and the procedures for reviewing this support. The review, which was already in process prior to the LGSCO judgement, has also drawn on feedback from schools via the SENCO network. The final report and recommendations will be available two weeks in advance of the planned LGSCO deadline of 17th March. A draft copy is included alongside this report.
37. Evidence of this report being considered at Cabinet on 28 March 2023 will be sent to the Ombudsman.

Report Author:

Jessica Brooke, CFLL Customer Relations Manager, 07891001205

Annexes:

Annex 1 LGSCO Public Report Reference 22 000 826

Annex 2 Training slides for handling customer complaints

Annex 3 DRAFT – Non delegable duty review

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Report by the Local Government and Social Care Ombudsman

**Investigation into a complaint about
Surrey County Council
(reference number: 22 000 826)**

12 January 2023

The Ombudsman's role

For more than 40 years the Ombudsman has independently and impartially investigated complaints. We effectively resolve disputes about councils and other bodies in our jurisdiction by recommending redress which is proportionate, appropriate and reasonable based on all the facts of the complaint. Our service is free of charge.

Each case which comes to the Ombudsman is different and we take the individual needs and circumstances of the person complaining to us into account when we make recommendations to remedy injustice caused by fault.

I have no legal power to force councils to follow our recommendations, but they almost always do. Some of the things we might ask a council to do are:

- > apologise
- > pay a financial remedy
- > improve its procedures so similar problems don't happen again.

Section 30 of the 1974 Local Government Act says that a report should not normally name or identify any person. The people involved in this complaint are referred to by a letter or job role.

Key to names used

Mrs X	The complainant
Y	Her son

Report summary

Children's services – Education, Health and Care plans

Mrs X complained the Council failed to deliver provisions set out in her son, Y's, Education, Health and Care plans between September 2020 and March 2022. She also complained about how it handled her complaint.

Finding

Fault found causing injustice and recommendations made.

Recommendations

The Council must consider the report and confirm within three months the action it has taken or proposes to take. The Council should consider the report at its full Council, Cabinet or other appropriately delegated committee of elected members and we will require evidence of this. (*Local Government Act 1974, section 31(2), as amended*)

Within three months of the date of this report, the Council will also:

- write to Mrs X to apologise for the faults identified and the injustice this has caused to her and Y;
- pay Mrs X £5,400 to be used for Y's educational benefit. This is to remedy the injustice caused to Y by lost hours of education and therapy provision between September 2020 and March 2022;
- pay Mrs X £1,000 to recognise the frustration and distress caused over a prolonged period (September 2020 to May 2022) as a result of the faults. This also recognises Mrs X's frustration is compounded by poor complaint handling and because this is the second time she has had to complain to us about very similar matters;
- pay Y £1,000 to recognise the distress caused by the lost provisions and the enduring nature of the Council's failure to provide suitable education and special educational provisions for him between September 2020 and March 2022. This figure recognises the enduring injustice resulting from the Council's failures since 2018, as set out in this report and the previous decision we issued;
- review its procedures for how it arranges and monitors delivery of provisions in the Education, Health and Care plans of its children and young people that it is under a non-delegable duty to make sure are provided. This should ensure that provision within a plan is put in place in a timely way after a plan is finalised and a clear process for the Council to monitor this thereafter; and
- review its children's and education services complaint handling processes to ensure complaints are investigated in line with its policy. It should ensure all complaint response letters make it clear whether they are a stage 1 or stage 2 response and tell the complainant what to do if they remain dissatisfied following the response. It should also provide evidence it has reminded its staff of this need to be clear and follow the correct complaints process.

The Council has agreed to our recommendations.

The complaint

1. Mrs X complained the Council failed to deliver provisions set out in her son, Y's, Education, Health and Care plans between September 2020 and March 2022. It also handled her complaint poorly. She says Y missed out on special educational provisions as a result which have impacted on his education and caused her and her son distress. She wants the Council to acknowledge its failings and provide a financial remedy for the lost special educational provision, the distress caused to her and Y and poor complaint handling. She also wants the Council to improve its services.

Legal and administrative background

The Ombudsman's role and powers

2. We investigate complaints about 'maladministration' and 'service failure'. In this report, we have used the word 'fault' to refer to these. We must also consider whether any fault has had an adverse impact on the person making the complaint. We refer to this as 'injustice'. If there has been fault which has caused an injustice, we may suggest a remedy. (*Local Government Act 1974, sections 26(1) and 26A(1), as amended*)
3. The First-tier Tribunal (Special Educational Needs and Disability) considers appeals against council decisions about special educational needs. We refer to it as the SEND Tribunal in this report.
4. When considering complaints, if there is a conflict of evidence, we make findings based on the balance of probabilities. This means that we will weigh up the available relevant evidence and base our findings on what we think was more likely to have happened.
5. Our view, based on caselaw, is that 'service failure' is an objective, factual question about what happened. A finding of service failure does not imply blame, intent or bad faith on the part of the council involved. There may be circumstances where we conclude service failure has occurred and caused an injustice to the complainant despite the best efforts of the council. This still amounts to fault and we may recommend a remedy for the injustice caused. (*R (on the application of ER) v CLA (LGO) [2014] EWCA civ 1407*)
6. Under the information sharing agreement between the Local Government and Social Care Ombudsman and the Office for Standards in Education, Children's Services and Skills (Ofsted), we will share this report with Ofsted.

Education, Health and Care plans

7. Some children and young people with special educational needs and disabilities will have an Education, Health and Care plan (EHC plan). The EHC plan identifies a child's education, health and social care needs and sets out the extra support needed to meet those needs.

8. The council has a duty to secure the specified special educational provision in an EHC plan for the child or young person (Section 42, Children and Families Act). The Courts have said this duty to arrange provision is owed personally to the child and is non-delegable. This means if a council asks another organisation to make the provision and that organisation fails to do so, the council remains responsible. (*R v London Borough of Harrow ex parte M [1997] ELR 62*), *R v North Tyneside Borough Council [2010] EWCA Civ 135*)
9. If a person is unhappy with the content of an EHC plan, they have a right of appeal to the SEND Tribunal. Where the Tribunal orders a council to amend an EHC plan, the council shall amend the EHC plan within five weeks of the order being made. (*Special Educational Needs and Disability Regulations 2014*) We cannot direct changes to the sections about education. Only the tribunal can do this.

The Council's complaints procedure

10. Councils must have complaints procedures to support the effective handling of complaints. Surrey Council's complaints procedure has two stages:
 - Stage 1 – local resolution. The service complained about will provide an initial complaint response within 10 working days. If the person is dissatisfied with the stage 1 response, they can request a stage 2 investigation.
 - Stage 2 – investigation. An officer independent of the service complained about will review the complaint. They will either:
 - carry out a further investigation; or
 - refer the request back to the service complained about with a request to reconsider all, or specific parts of the complaint. They will provide a response within 20 working days.

How we considered this complaint

11. We produced this report after examining relevant documents and interviewing the complainant.
12. We gave the complainant and the Council a confidential draft of this report and invited their comments. The comments received were taken into account before the report was finalised.
13. We considered our decision statement from a previous complaint Mrs X brought to us which we closed in September 2021 (Case reference: [19 020 776](#)). In this case we found the Council at fault as it failed to provide Y with education between March 2018 and April 2020.

What we found

What happened

14. Mrs X's son, Y, has special educational needs and an Education, Health and Care plan (EHC plan). In September 2020, his plan included the following special educational provisions:
 - 15 hours tutoring a week;
 - 1 hour speech and language therapy a week with a termly review;
 - occupational therapy – weekly sessions, a sensory diet programme and daily implementation of an occupational therapy programme;

- a personal learning plan including education and therapeutic input, with a termly multi-disciplinary review.
15. Mrs X was unhappy with the content of the plan and appealed to the SEND Tribunal.
 16. Mrs X says between September 2020 and January 2021, Y received 4 hours tuition a week. Between February and July 2021, he received 6 hours a week. The Council has not provided any evidence to show it offered more tuition or that Y received more tuition than this during this time.
 17. The SEND Tribunal heard the case in April 2021 and ordered the Council to include the following provisions in Y's plan:
 - 25 hours tutoring a week;
 - provision of an occupational therapy (OT) programme;
 - 18 hours a year of speech and language therapy;
 - weekly non-directive therapeutic provision e.g. animal therapy.
 18. The Council amended the EHC plan in line with the Tribunal order and issued the final plan in mid-May 2021.
 19. Mrs X complained to the Council in June 2021. She said the Council had failed to provide education and deliver provisions in Y's plan since September 2020 and despite the Tribunal's order, provision listed in the May 2021 final plan was still not in place. She said:
 - despite his September 2020 EHC plan specifying 15 hours a week tuition, he only received 4 hours a week between September 2020 and February 2021 and 6 hours a week from February onwards;
 - he never had a personalised learning plan;
 - he did not receive his full occupational therapy provision – a sensory diet was not provided until January 2021, the programme devised in November 2020 was never reviewed or adjusted and staff working with Y daily were not trained to deliver it; and
 - termly multi-disciplinary meetings did not take place.
 20. The Council told Mrs X it would not consider her complaint at that time as she had another complaint currently being considered by us. It told her it was putting the complaint "on hold".
 21. In July and August 2021, the Council worked to get provision in place. By the beginning of September, Y was receiving the 25 hours tutoring, OT provision and some speech and language therapy. Mrs X complained that Y was still not receiving all the provisions in his plan. She said the animal therapy and some speech and language therapy was still not in place.
 22. At the end of September, the Council wrote to Mrs X. It said it had now agreed to fund 18 hours of speech and language therapy and that the animal therapy could start. In its response to our enquiries, the Council said this email was its stage 1 complaint response. However, the email did not indicate that it was a formal complaint response, nor did it tell Mrs X of her right to request a stage 2 investigation, if she remained dissatisfied.
 23. The Council said it closed her complaint in October as it did not hear from Mrs X after this email.

24. In November 2021, Mrs X contacted the Council to say Y had been unable to engage with his occupational therapist and she felt he needed a different therapist. She also said the animal therapy sessions still had not begun.
25. The OT provider contacted the Council to say Mrs X had asked it to be involved in termly multi-disciplinary meetings as this provision was in Y's EHC plan. It said the Council had not asked for this and so it was not covered in the original quote. It set out its quote for it to attend 3 multi-disciplinary meetings a year and asked the Council to approve the additional funding. The Council did not respond to this request.
26. In December 2021, the OT provider told the Council it could no longer deliver Y's provision. It said Y had struggled to engage with his therapist. Mrs X had asked if he could be allocated a different therapist, but they did not have an alternative therapist available.
27. As part of its feedback to the Council, the OT provider said the Council had not funded any hours for multi-disciplinary meetings. Because of this, it had been unable to liaise with other professionals working with Y to learn and share what worked for him. If they had been able to do this, it might have helped them understand better how they could engage him.
28. Between December 2021 and February 2022, the Council says it contacted 10 other OT service providers, but none had capacity.
29. In February 2022, Mrs X asked the Council for an update on the OT provision and the animal therapy. She said the animal therapy provider had told her it could begin several weeks ago, and she did not know why this had not started. The Council said it had sent the provider some finance forms in September 2021, but the provider had not returned them. It said it would work to resolve the issue.
30. Y began attending animal therapy sessions in March 2022.
31. In March 2022, Mrs X re-submitted her June 2021 complaint to the Council. In addition to the issues raised in June 2021 she said:
 - delays in agreeing the funding for therapies during Summer 2021 had led to difficulties co-ordinating the provision, even though the Council was duty-bound to deliver all the provisions set out in the EHC plan as ordered by the SEND Tribunal;
 - she was unsure why the Council did not investigate her complaint in June 2021, as the ongoing Ombudsman investigation related to an earlier time period. The Council had then closed her complaint during Autumn 2021 without telling her, which had delayed any meaningful resolution to the issues raised; and
 - Y did not receive any animal therapy between May 2021 and March 2022.
32. In April 2022, the Council told her it had considered her complaint at stage 2 of its complaints procedure. It said it had decided to ask the local service to provide a more detailed response, as it had not yet fully considered the issues raised at stage 1.

33. The Council provided an additional complaint response in May 2022. It accepted there had been a delay setting up the animal therapy and offered her £300 to recognise this. It said it had tried to get another OT provider in place, after Y's provider withdrew in December 2021. However, it had not been able to find a replacement. It accepted it had not delivered all Y's educational and therapeutic provision. It said it had offered her a financial remedy for lost provision after its stage 2 response.
34. Mrs X responded and said the remedy offer it referred to was made after a previous complaint she made about lost special educational provision before April 2020.
35. The Council told her it had completed its consideration of her complaint and she could bring her complaint to us if she remained dissatisfied. Mrs X brought the complaint to us in May 2022.

Conclusions

36. The Council was under a non-delegable duty to ensure the provision in Y's EHC plan was delivered. After councils issue an EHC plan, we expect them to ensure all the provision in the plan is in place. If a council later becomes aware provision is missing, it should act to secure it without delay.

Provision between September 2020 and mid-May 2021 set out in Y's September 2020 EHC plan

37. Mrs X says the Council did not deliver the full 15 hours a week tuition provision set out in Y's plan. The Council has not provided any evidence to suggest otherwise, either in its complaint responses to Mrs X or information provided to us. On the balance of probabilities, we find Y only received 4 hours tuition a week between September 2020 and January 2021 (11 hours a week of lost provision) and 6 hours a week between February and mid-May 2021 (9 hours a week of lost provision). This is fault and meant Y missed out on a significant amount of educational provision during this period.
38. There is no evidence Y had a personalised learning plan, or of any termly multi-disciplinary meetings as set out in this plan. This is fault.
39. There is no evidence Y had a sensory diet programme before January 2021 or that the OT programme was delivered daily or reviewed. This is fault.

Provision between mid-May 2021 and March 2022

40. Between mid-May and July 2021, Y received 6 hours tuition a week. This was 19 hours less each week than the 25 hours that was in his amended plan issued in mid-May 2021. Y did not receive all the tuition hours set out in his EHC plan and this is fault.
41. From September 2021 onwards, Y received 25 hours tuition a week, in line with his plan.
42. There is no evidence Y received OT provision between mid-May and July 2021. This is fault.
43. Y received OT provision between September and December 2021. Although the evidence shows the Council tried to find a suitable alternative provider between December 2021 and March 2022, it did not manage to do so and so Y did not receive any provision during this time. This was service failure and is fault.

44. The plan finalised in May 2021 included 18 hours a year speech and language therapy provision. Between April and July 2021, Y received 1 session every half term. The Council confirmed with Mrs X it had arranged for Y to receive the full 18 hours of speech and language therapy provision at the end of September 2021. Y received this provision from October 2021 onwards. On the balance of probabilities, Y missed out on some speech and language therapy provision between May and September 2021. This is fault.
45. The animal therapy included in Y's plan in May 2021 did not start until March 2022. The Council said this was because the provider had not sent it the finance forms in September 2021, and it did not realise this until February 2022. The Council should have checked this earlier to satisfy itself the provision set out in Y's EHC plan had started as it had a non-delegable duty to ensure Y received this provision. Mrs X told it Y was not receiving the animal therapy in November 2021, but the Council did not act and allowed the situation to drift. This is fault and meant Y missed out on animal therapy provision between May 2021 and March 2022.
46. The Council has accepted Y missed out on the animal therapy provision and offered Mrs X £300 as a remedy. We discuss our consideration of this further below.
47. There is no evidence Y had a personalised learning plan with integrated education and therapy, or of any termly multi-disciplinary meetings as set out in his plans between September 2020 and March 2022. This is fault.

Complaint handling

48. There is no good reason why the Council could not have investigated Mrs X's complaint in June 2021. The fact she had another complaint being considered by us was not good reason for putting her complaint on hold, as the two complaints were entirely separable. The failure to investigate her complaint in Summer 2021 in line with the timescales set out in its policy is fault.
49. The email sent to Mrs X in September 2021 did not say it was a complaint response, did not respond to all the points she had raised and did not tell her how to escalate her complaint if she was unhappy with the response. The email did not indicate it was a complaint response at all. The Council then closed the complaint without informing Mrs X. This is fault.
50. After Mrs X re-submitted her complaint in March 2022, the Council caused further uncertainty by considering the complaint at stage 2 and referring the complaint back to the service for an additional response at stage 1, when Mrs X did not know she had received a stage 1 response in the first place. The additional response then referred to a remedy offered to Mrs X in relation to a different complaint. This led to further confusion.
51. Overall, the Council handled her complaint poorly and this was fault. It should have taken a maximum of 30 working days in line with its complaints policy. Instead, it took 11 months. The poor complaint handling caused Mrs X uncertainty and frustration and led to delay in the Council responding to her concerns.

Considering the remedy

52. The Council has offered Mrs X £300 as a financial remedy for the lost animal therapy provision. However, as set out above, the evidence shows it was not just the animal therapy that Y missed out on. The offer of £300 is insufficient to remedy the injustice caused to Y for all the lost educational and therapy provisions between September 2020 and March 2022.
53. The Council also handled Mrs X's complaint poorly. This caused her frustration and uncertainty and meant she did not receive a response to the significant concerns she raised for 11 months, instead of 30 working days.
54. Our previous investigation found that the Council had failed to provide Y with a substantial amount of education between March 2018 and April 2020, causing him a significant injustice. The Council agreed to pay Y £1,000 to recognise the distress caused and Mrs X £600 for distress and time and trouble in bringing her complaint. The faults identified in this investigation follow on consecutively from our previous investigation and have caused Y a significant additional, and compounded injustice for support he was entitled to receive by law. Mrs X has also been caused a significant additional injustice bringing this further complaint on his behalf.
55. We have recommended a suitable remedy below, based on our guidance on remedies and considering the remedies agreed following our previous investigation. In reaching the recommended figures, we have considered what education and therapy Y missed out on during each school term we have investigated and the cumulative injustice of the enduring faults from March 2018 on Mrs X and Y.

Recommendations

56. The Council must consider the report and confirm within three months the action it has taken or proposes to take. The Council should consider the report at its full Council, Cabinet or other appropriately delegated committee of elected members and we will require evidence of this. (*Local Government Act 1974, section 31(2), as amended*)
57. Within three months of the date of this report, the Council will also:
 - write to Mrs X to apologise for the faults identified and the injustice this has caused to her and Y;
 - pay Mrs X £5,400 to be used for Y's educational benefit. This is to remedy the injustice caused to Y by lost hours of education and therapy provision between September 2020 and March 2022;
 - pay Mrs X £1,000 to recognise the frustration and distress caused over a prolonged period (September 2020 to May 2022) as a result of the faults. This also recognises Mrs X's frustration is compounded by poor complaints handling and because this is the second time she has had to complain to us about very similar matters;
 - pay Y £1,000 to recognise the distress caused by the lost provisions and the enduring nature of the Council's failure to provide suitable education and special educational provisions for him between September 2020 and March 2022. This figure recognises the enduring injustice resulting from the Council's failures since 2018, as set out in this report and the previous decision we issued;

-
- review its procedures for how it arranges and monitors delivery of provisions in the EHC plans of its children and young people that it is under a non-delegable duty to make sure are provided. This should ensure that provision within a plan is put in place in a timely way after a plan is finalised and a clear process for the Council to monitor this thereafter; and
 - review its children's and education services complaints handling processes to ensure complaints are investigated in line with its policy. It should ensure all complaint response letters make it clear whether they are a stage 1 or stage 2 response and tell the complainant what to do if they remain dissatisfied following the response. It should also provide evidence it has reminded its staff of this need to be clear and follow the correct complaints process.
58. The Council has accepted these recommendations.

Decision

59. We have completed our investigation into this complaint. We have found fault and the Council has agreed action to remedy the injustice caused and improve Council services.

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Handling Complaints For Service Improvement



CFLL Customer Relations Team (CRT)

Be.heard@surreycc.gov.uk

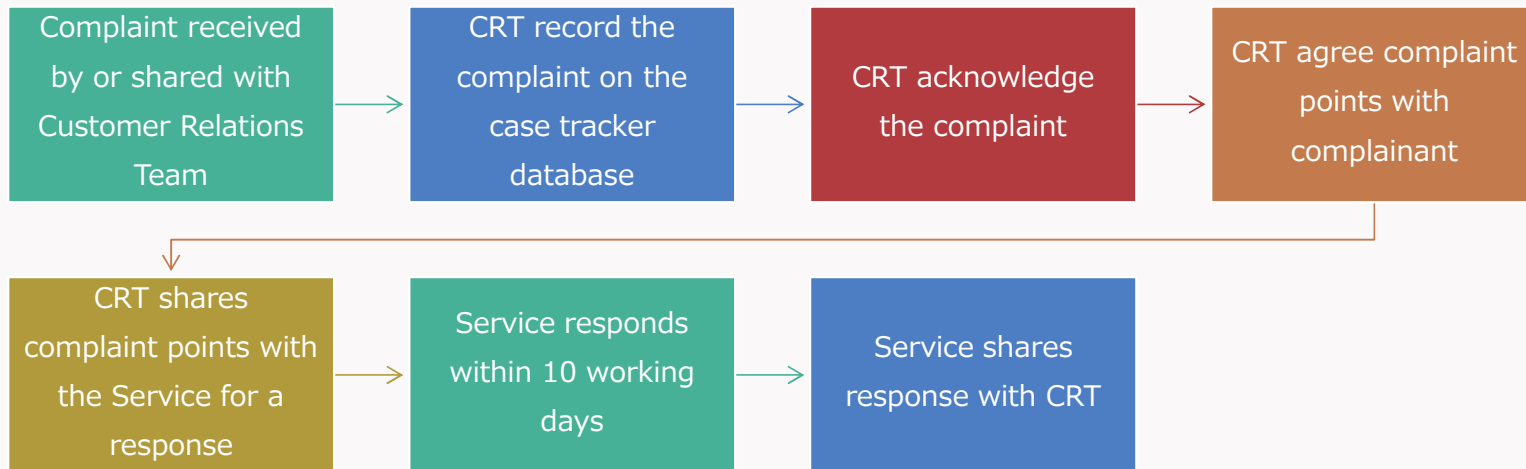
Two Tier Formal Corporate Complaint Process

- Stage 1 – local response – 10 workday timescale
- Stage 2 – review by CRT – 20 workday timescale



Escalation to Local Government and
Social Care Ombudsman

Stage 1 – Initial Response



Stage 2 – CRT Review

CRT review request for
escalation



Outcome options include:

No further
action

Additional
response by
the Service

Peer review
by CRT

Mediated or
restorative
meeting

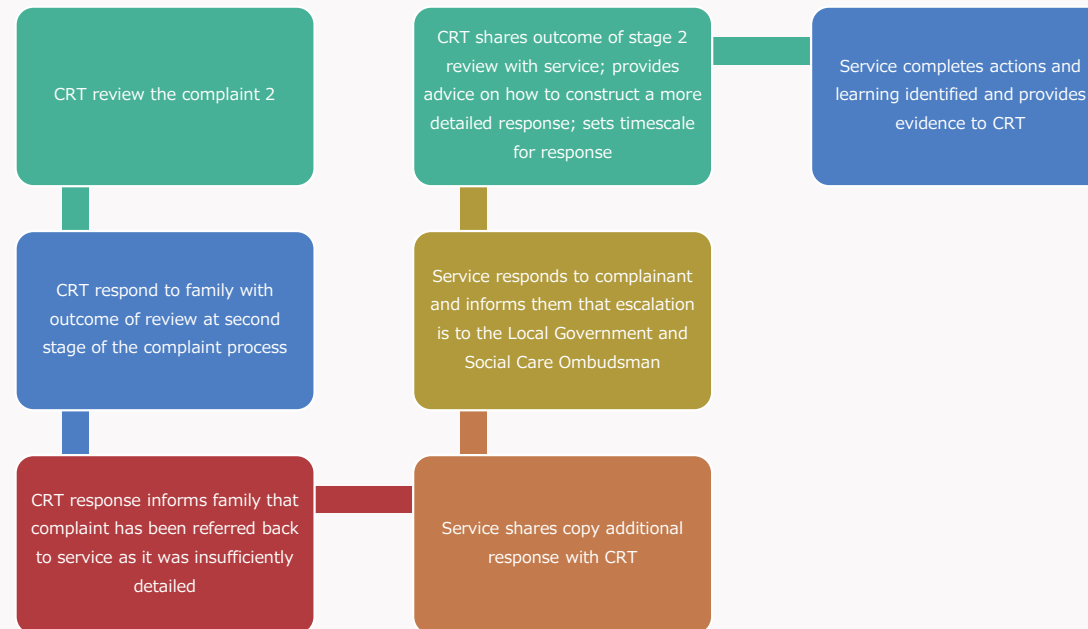
Independent
Investigation

No Further Action

CRT respond to complainant with rationale for no further action

CRT inform family that escalation is to the Local Government and Social Care Ombudsman

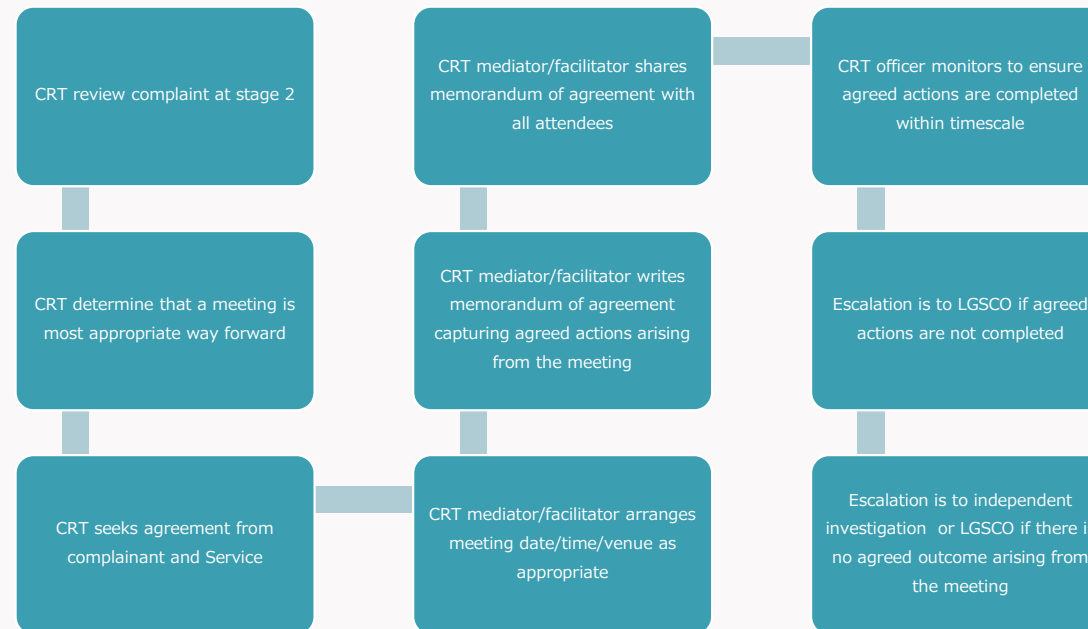
Additional Response by Service



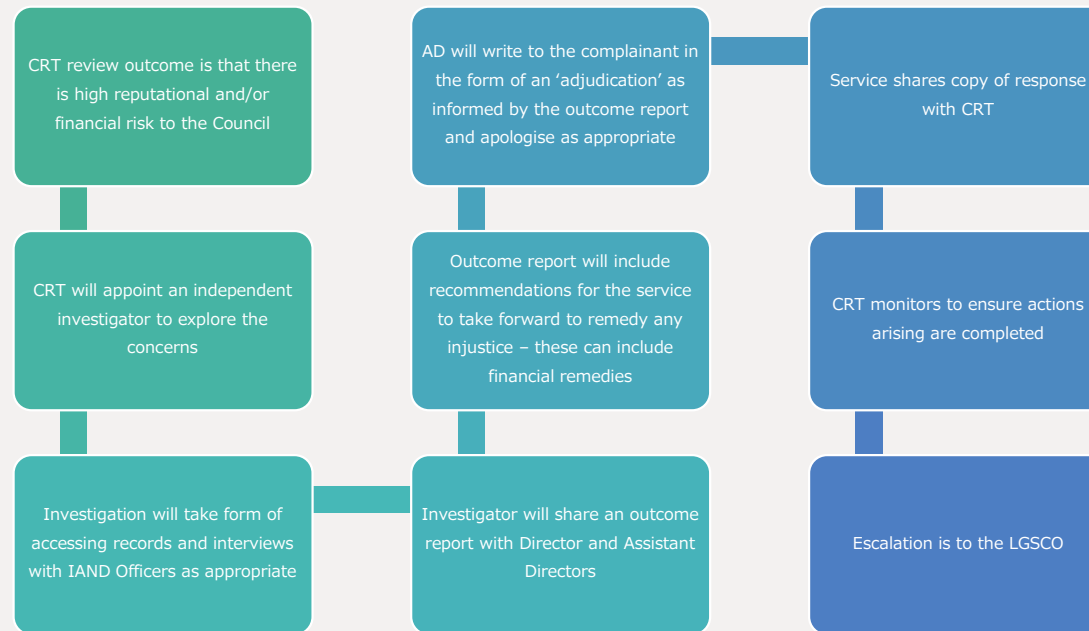
Peer Review



Mediated/Restorative Meeting



Independent Investigation



Local Government and Social Care Ombudsman

Usually expects both stages of the local process to be completed

Can decide to investigate a complaint at any time

Initial enquiry usually has a 25 day timeframe for response

Reputational Risk to the Council if responses are delayed

Draft Decision usually has a 5 day timeframe for a response

Reputational Risk to the Council if responses are delayed

Final Decision – agreed remedies must be completed within timescale

LGSCO Public Report

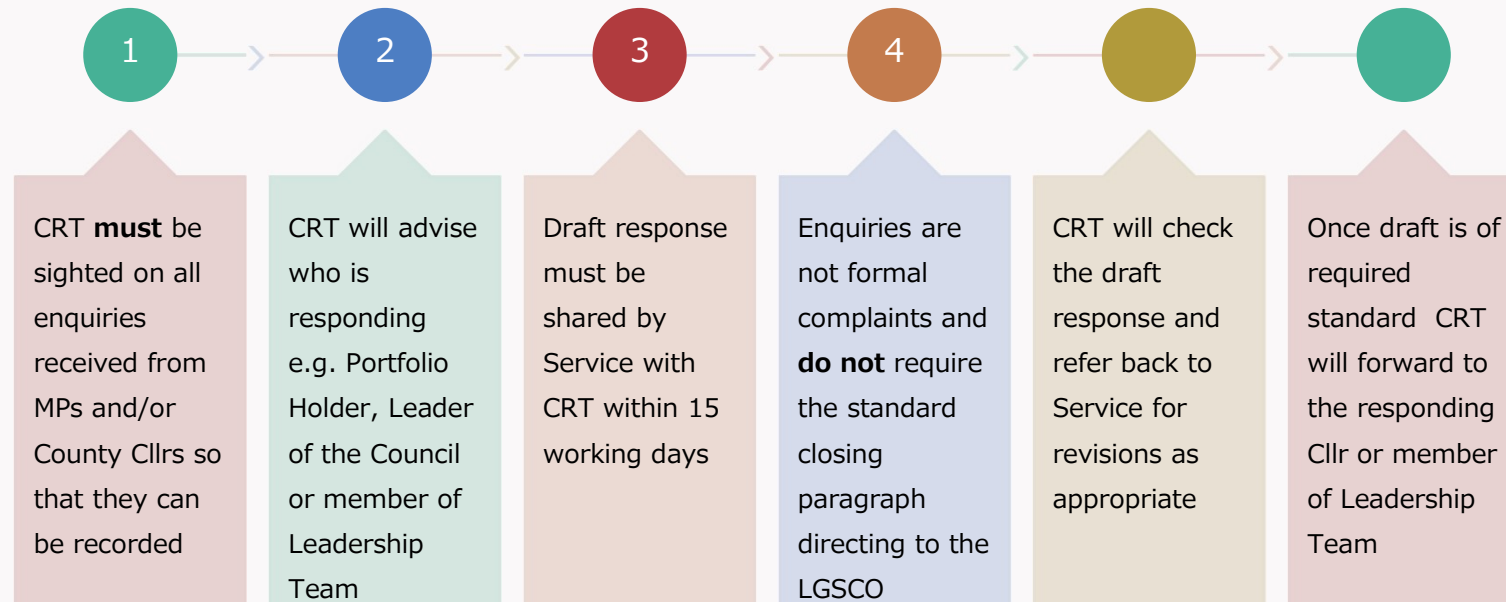
When the LGSCO finds evidence of systemic failure and/or significant injustice arising from a complaint they may issue a Public Report

Public Reports are presented at Cabinet

Director provides comment on service actions/improvements to ensure similar fault and injustice does not arise in the future

Public Reports attract significant reputational and financial risk for the Council

Enquiries from Cllrs and MPs



Themes

Underlying Root Causes

- **Lack of Accountability**
- **Poor standards of communication**

Continuously chasing for updates

Delay in EHCNA,EHCP and AR processes

Delay in H2STA applications and delivery

No flexibility in Direct payments/Personalised Budgets

Child missing education

Child not at the Centre /Silo working

Carers Assessments

Contact Us - Customers

Record

Customers can record their own complaints on line via this link Children's social care, education and SEND complaints

[Surrey County Council](https://www.surreycc.gov.uk)
([surreycc.gov.uk](https://www.surreycc.gov.uk))

Call

Customers can call the Customer Relations Team on 01483 519095

Email

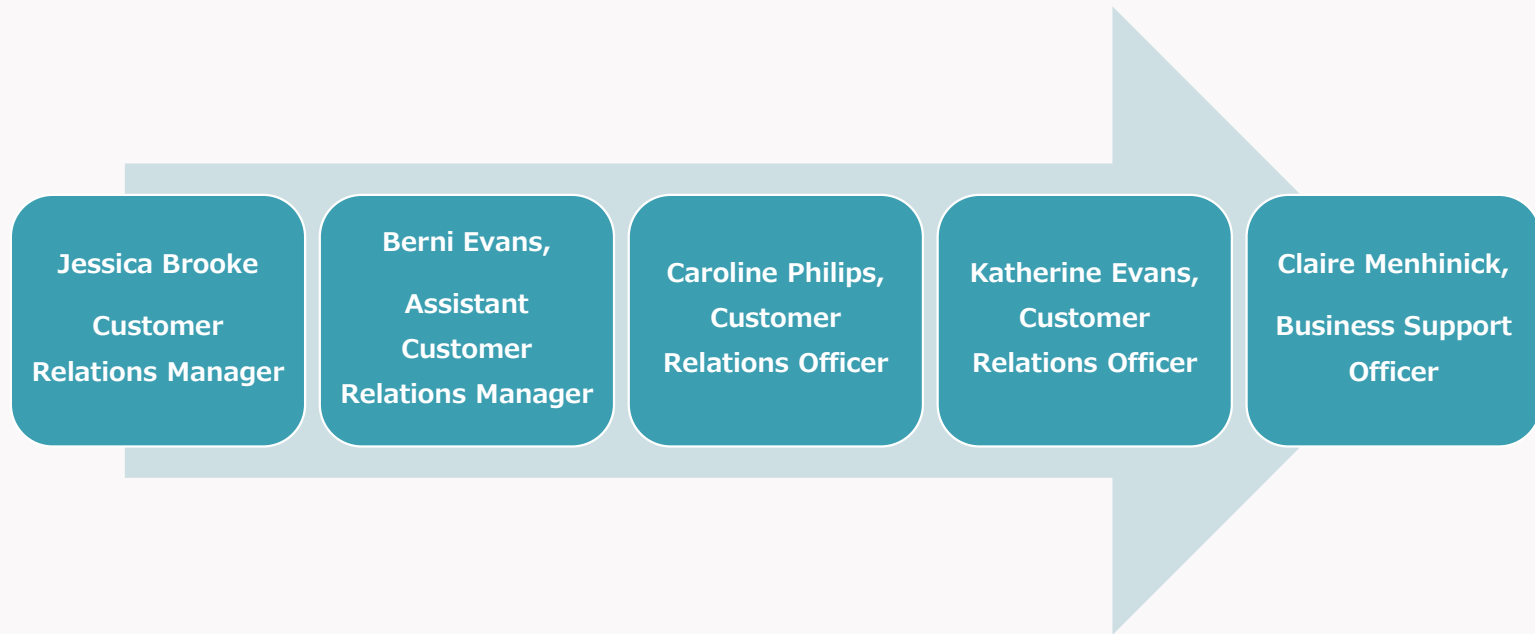
Customers can email the Customer Relations Team at mailto:
Be.heard@surreycc.gov.uk

Record

Customers can record their complaints with the LGSCO via this link Home - [Local Government and Social Care Ombudsman](#)

Contact Us

Education Services and H2STA



Contact Us

Childrens Services





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Our reference SUR098993

Action: The Council should review its procedures for how it arranges and monitors delivery of provisions in the EHC Plans of its children and young people that it is under a non delegable duty to ensure are provided. This should ensure that provision within a plan is put in place in a timely way after a plan is finalised and a clear process for the Council to monitor this thereafter.

This review will consider both the arranging of support at the time of issuing a plan and also the review of arrangements.

Arranging provision at the time of issuing a plan-

When a final plan is issued to a child it will be pertinent if a child is currently in a setting or not.

It is the expectation of the Local Authority that where a child can be in an educational setting this should be enabled wherever possible

If the child or young person is in a setting the local authority liaises with the setting and provides a level of support in order for the setting to be able to deliver the provision as specified in the EHCP through IPSB or EIF. The setting will be aware of the level of provision required as detailed in the EHCP and will make the necessary arrangements for the plan to be enacted. At this time, and within 15 days of the plan being issued, the setting should make representation to the authority if there are elements of the provision which are of concern. Any considerations will then be provided to the authority's Education Health and Care Plan Governance Board (EGB) for consideration by the multi disciplinary panel. A decision from the panel will be provided to the setting within 5 working days of the panel taking place in order for the setting to put in place the appropriate provision. A meeting with senior officials from the SEND department will then be offered to the setting to establish how all elements of the provision will be secured.

Where a child is not in a setting and where the family have not elected to make alternative arrangements such as Electively Home Educating their child, the authority may have responsibility for delivery of education as well as securing special educational provision that will meet needs as outlined in the plan. Where this is specified in section I, delivery may be through an EOTAS (Education Other Than At School) package of support. This can be considered alongside the published personal budget policy, dependent on how the family wishes to proceed at this point. Independent advice is available at this time to the family through the surrey SILC services - [Surrey Independent Living Charity \(SILC\) \(surreyilc.org.uk\)](http://surreyilc.org.uk)

Where delivery cannot be provided by Surrey's currently commissioned services the Local Authority will then establish how these services can be provided to meet the provision as detailed in the plan using independent or alternative providers. Capacity for providing securing independent providers is a increasing concern. We maintain

an extensive Alternative Provision Directory for officers to determine providers and liaise with families to secure quality assured special education provision.

The aim for all provision should be, where possible for a child to be educated within a setting. Any deviation from this should be for the shortest possible time and with a plan of reintegration in place.

Families may use the personal budget process to secure provision in collaboration with local authority officers.

Monitoring provision

The review of a child's engagement in learning is an essential part of the annual review process. The statutory review takes place at least annually and an interim review can also be called, if it is necessary to review the child's support package more frequently. This review can be called by the child, or at the request of the parent or school. In Surrey, we have incorporated our review and the monitoring of the non-delegable duty to ensure education is provided into the annual review process.

Surrey annual review template documents have recently been updated, along with revised guidance for practitioners. In order to complete this task, a working group was established, the membership of which included SCC SEN Case Officers, SCC SEN Senior Case Managers, SCC SEN Officers, School SENCOs, Family Voice Surrey (parent carer forum) members, and representatives from Surrey Virtual School.

The working group developed new annual review documentation to strengthen the following within the templates:

- Enabling the young person's voice to be captured.
- Reviewing and updating the needs, outcomes and provision detailed in the EHCP.
- Clearly identifying whether provision is or is not being delivered and enabling this to be recorded clearly.

The updated guidance for SENCOs and practitioners now includes the instructions below, which set out how information about provision not being delivered should be recorded.

'Section 42 Children and Families Act 2014: Duty to secure special educational provision and health care provision in accordance with EHC Plan. All provision set out on the EHC Plan should be in place and delivered unless there is a clear rationale for this, for example, it is no longer required. If provision is not being delivered please identify this in this section. This would include any provision in Section F, C or G of the EHCP including SLT, OT and Health not only education. Please give a clear explanation or rationale as to why the provision is not being delivered. For example 'CYP's needs have changed and this provision is no longer required as outlined in the SLT report XX has been discharged as of xxxxxx'

Following the review where this is not apparent the further actions will now be taken by the school:

- A conversation will be held with the SEND service and the case officer in the first instance to establish what additional education is required to meet the duty to provide a suitable education.
- If a part time timetable is in place the inclusion services will ensure that the school have parental consent and that this arrangement is time bonded.
- If the school do not feel that the full entitlement is being provided the responsibility would be for them to inform the SEND team and an interim annual review would need to be convened.

Where a child is not in school:

- The SEND case officer or Senior Case Manager (SCM) will discuss the provision with the allocated provider
- If provided through A2E, the local authority's service for children who are out of school, reports will be provided as part of the annual/interim review process

If the provider is employed by the family and commissioned directly:

- The local authority will discuss this at the annual/interim review as above and advise accordingly on a case by case basis

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SURREY COUNTY COUNCIL**CABINET****DATE: 28 MARCH 2023**

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REPORT OF CABINET MEMBER: **MARK NUTI, CABINET MEMBER FOR ADULTS AND HEALTH**
NATALIE BRAMHALL, CABINET MEMBER FOR PROPERTY AND WASTE

LEAD OFFICER: **LIZ BRUCE, JOINT EXECUTIVE DIRECTOR FOR ADULT SOCIAL CARE AND INTEGRATED COMMISSIONING**
LEIGH WHITEHOUSE, DEPUTY CHIEF EXECUTIVE AND EXECUTIVE DIRECTOR FOR RESOURCES

SUBJECT: **RE-MODELLING THE STRATEGIC SHORT BREAKS OFFER FOR ADULTS WITH LEARNING DISABILITIES AND/OR AUTISM**

ORGANISATION STRATEGY PRIORITY AREA: **TACKLING HEALTH INEQUALITY/ENABLING A GREENER FUTURE/ EMPOWERING COMMUNITIES**

Purpose of the Report:

In November 2020 Cabinet endorsed the delivery approach for the Accommodation with Care and Support Strategy for individuals with learning disabilities and/or autism¹. Furthermore, Cabinet approved the allocation of sites that would in-principle be developed for Supported Independent Living and Short Breaks, as well as, referencing the need to re-model the strategic Short Breaks offer².

Surrey County Council's (the Council) Short Breaks offer needs modernising to provide modern fit for purpose overnight accommodation for residents. Through modernising and remodelling our strategy we will provide a more diverse offer of support in the community, ensure equity of access for individuals with eligible needs and employ a strengths-based approach that promotes the independence of our residents.

Short Breaks gives people with learning disabilities and/or autism an opportunity to share experiences and socialise in their community outside of their family home, whilst enabling their family carer, to maintain their own health and well-being by providing them with a break from their caring responsibilities.

Recommendations:

It is recommended that Cabinet:

1. Approves the proposal to re-model the Council's Strategic Short Breaks offer by working with the market to ensure a more diverse Short Breaks offer.

¹ [Part 1 - Supported Independent Living Report- Cabinet.pdf \(surreycc.gov.uk\)](#)

² [Supported Independent Living Programme - Batch 1 Development Part 1 report.pdf \(surreycc.gov.uk\)](#)

2. Grants approval to proceed with the design and construction of Short Breaks accommodation at two identified sites in Reigate and Banstead and Woking within the capital funding envelope set out in Part 2 of this paper. The sites are as follows:
 - Lakers, Denton Way, Goldsworth Park, Woking, GU21 3LG
 - The Squirrels, The Horseshoe, Banstead, SM7 2BQ
3. Confirms approval to procure a developer to construct the new Short Breaks accommodation and delegates approval to award the contract, (including any associated changes related to the contract, once it has been awarded to ensure that it continues to meet the objectives related to this report) and manage the developments within the agreed capital funding envelope to:
 - The Director of Land and Property in consultation with the Cabinet Member for Property and Waste.
 - The Joint Executive Director for Adult Social Care and Integrated Commissioning in consultation with the Cabinet Member for Adults and Health.

Reason for Recommendations:

To promote Carers wellbeing and enable them to have a break from their caring responsibility, but still be able to support the individual to live at home.

To enable residents with learning disabilities and/or autism who meet the Council's eligibility criteria for Adult Social Care (ASC) funding to have their need for overnight Short Breaks met in a modern, fit for purpose setting with all the necessary facilities and amenities.

To promote the independence of Surrey residents with learning disabilities and/or autism and enable them to remain in their family homes and connected to their local community.

To ensure that together with our partners we develop a range of options that improve outcomes and support for individuals and their families when offering a short break.

To make an essential contribution towards the Council's strategic objective to tackle health inequality, in line with the 2030 Community Vision for Surrey.

Executive Summary:

1. The Council has historically mainly offered a traditional bed-based approach to providing a short break with a lack of alternative offers. As part of our consultation with carers it was identified that carers are willing to consider alternatives to bed based Short Breaks.
2. Currently there are 7 registered bed based Short Breaks services in Surrey, providing 42 beds per night but only five services are operational. The two that are non-operational are Arundel House, which has closed as the fabric of building is no longer suitable to meet the assessed needs of individuals requiring a short break; and Rodney House, closed because the site is de-registering and being re-purposed to provide Supported Independent Living through the Accommodation with Care and Support Strategy.
3. The remaining five sites provide access to 33 beds per night across Surrey. But this bed capacity is often reduced to cater for the increasingly complex needs of individuals, particularly those with behaviour that challenges, to ensure that the needs of the individuals' accessing services at any one time can be met safely by staff. Appendix 1 presents the locations of the current Short Breaks services in Surrey.

4. During the COVID-19 pandemic most of our Short Breaks services closed or operated a reduced service. Initially, family carers appeared to cope, but the extended duration of the COVID-19 pandemic saw families in need of support and more open to accepting alternative non-bed based Short Breaks support. This offer included:
 - Crossroads Care Surrey, a carers support Charity, extended its sitting services for carers of individuals in transition.
 - Spot purchasing more home based care for people with learning disabilities to give carers a break within the home.
 - Outreach services to provide a few hours support to individuals outside the family home.
 - Surrey Choices, the Council’s Local Authority Trading Company focused primarily on the delivery of community support services to people with a learning disability and/or autism setting up a flexi break service to provide day support at weekends.

5. Positive feedback from families about the alternative services offered during the pandemic has resulted in working with the market to develop a cost-effective offer that is sufficiently diverse to respond to differing needs and reflects the level of the different models of provision required.

6. This has also involved working with colleagues in the Council’s Land and Property team to identify appropriate sites for the development of modern, fit-for-purpose, future-proofed over-night Short Breaks facilities; and working with practitioners to understand the new menu of Short Breaks options.

7. It is anticipated that as family carers age the request for Short Breaks will increase. There are currently 1,345 individuals living with family carers. The table below shows the breakdown of individuals by age living with family carers.

Age individual	Under 18	18-19	20-30	31-39	40- 49	50+	Grand Total
Living with family carers	108	161	643	224	105	104	1,345

8. Targeted work has started with all families, focussing on those supporting individuals who are aged 50 and over. It is vital plans are in place for the care and support of their son or daughter. ASC practitioners are engaging families and helping them understand that there are a range of alternatives for Short Breaks in addition to overnight stays. These include:
 - Home based care support, which is provided in the home to allow the carer to take time out. This may or may not include personal care and may include short trips out from the home with the cared for person.
 - Outreach support (including via a Personal Assistant for example) to take the person with care/support needs out to an activity or to learn a skill. This provides the carer with a break and the person they care for continues to develop their skills and take part in activities they enjoy.
 - Day care opportunities and extended evenings where the person being cared for spends time in an appropriate setting to allow the carer to have a break.
 - A flexi-break during the day on Saturday or Sundays.
 - A flexi-break overnight with friends (rather than a break in a residential setting).
 - Shared Lives scheme offers over-night support where the person being cared lives in Shared Lives carer’s family household for a short while.

- 13
9. All these options can be purchased using a Direct Payment paid by the Council based on a person's assessed Care Act eligible needs.
 10. Alongside the alternatives set out in paragraph 8, above, we have reviewed the current bed-based services. The review found significant issues with the current Short Breaks Service, including:
 - The current geographical locations favour the east of the county, four services are based in East/Mid Surrey.
 - Currently there is limited provision in the North/West area of Surrey.
 - The environment of the service at one site is not fit for purpose in the delivery of Short Breaks to the people needing support and is currently not in use.
 - The built environment for much of the service is not fit for purpose and is not suitable to support the future needs of individuals with behaviour that challenge and/or who have complex needs.
 - Currently less than 8% of the potentially eligible population access provision.
 - The choice of bed based Short Breaks is not determined by the needs of the individual, but instead, reflects longstanding historic arrangements.

The Development of Short Breaks on Council owned land

11. The proposed strategic remodelling of the Short Breaks Service includes the development and construction of Short Break accommodation at two identified sites in Surrey on Council owned land. Details of the proposed capital investment by SCC in these sites is commercially sensitive and therefore set out Part 2 of this paper. These sites will provide a total of 16 bed-based places in Reigate & Banstead and Woking. When this accommodation is operational it will be for the sole use of Surrey residents with eligible care and support needs.

Batch 1 Schemes - location	District & Borough	Planned opening	No. of Short Breaks units
Lakers, Denton Way, Goldsworth Park, Woking, GU21 3LG	Woking	Jan 2025	8
The Squirrels, The Horseshoe, Banstead, SM7 2BQ	Reigate & Banstead	April 2026	8
		TOTAL	16

12. To provide these schemes with the required specialist provisions, together with outstanding amenities including private gardens and spaces, a higher-than-average specialist accommodation standard has been applied. This is because typical accommodation standards for general needs housing do not meet the requirements for individuals with specialist needs. The Short Breaks bedrooms and communal areas have been designed to cater for the needs of individuals using the service, and enable the following:
 - All bedrooms and guest communal spaces are designed to accommodate the increased activity zones needed by users with learning disabilities and autism and their care workers and to meet the functionality requirements of wheelchair users.
 - Interior and exterior spaces are all designed to Building Regulations Approved Document M4(3) wheelchair user standards which means a wheelchair user can

stay in the accommodation and will have the ability to use any outdoor space, parking, and communal facilities.

13. The specialist requirements, as listed below, were coproduced with commissioners and occupational therapists and are future-proofed. The Design Brief Document sets out the approach to deliver fit for purpose buildings meeting user requirements. The Design Brief Document was coproduced with representatives from ASC Service and the designs have been approved by the Accommodation with Care and Support Programme Board.
 - a. **Amenity Space:** Following best practice guidance (for the design of spaces for people with autism) specific interventions and adaptations to the landscape scheme have been made. This includes variations in the level of sensory stimulation, the creation of distinct zones some of which are deliberately designed to encourage social interaction, and others which are more private in nature. Providing a physical sense of movement was something encouraged in the feedback received from the Occupational Therapists, so the provision of a trampoline for recreational use for each site has been proposed. Areas which provide shelter from the elements are also embedded into the design, and particular treatments for specific boundaries have also been considered.
 - b. **Sustainability:** The Council has committed to achieving Net-Zero Carbon for Council Operations by 2030, with Surrey County to achieve Net-Zero Carbon by 2050. There is not a countywide strategy in place which defines sustainability targets to be achieved or specific approaches and measures that should be considered. The Short Breaks design is intended to deliver energy efficient buildings which will have low operating costs. The Consultant team are working to incorporate designs for super-insulated facilities with highly efficient electrical and mechanical services. As such, for the current Short Breaks schemes to meet the Council's sustainability aims, Net-Zero target and address fuel poverty, the following principles are proposed:
 - Fabric first approach
 - All electric buildings
 - Low carbon, low-cost heating solutions
 - Maximise onsite renewable energy generation
 - Enhanced control of energy use
 - Measure the embodied carbon
 - Sustainable use of water resources
 - Resource efficiency
 - Encourage active transport and low/zero carbon motorised mobility
 - Biodiversity and ecology
 - Healthy living places
 - Smart Building
14. The specialist requirements are such that the construction costs will not be like that of a typical house build. The construction costs and financial modelling for each Short Breaks scheme are commercially sensitive and set out in the Part 2 report.
15. The Short Breaks service is business critical to ASC. It will provide essential support to residents in areas of the county that lack sufficient provision and prevent carer breakdown which would lead to more expensive care and support options having to be sourced.

16. By developing the new accommodation Surrey will have 42 beds available for Short Breaks across the county in addition to the alternative options described above.

Consultation:

17. Following an extensive consultation exercise Carers have told us that being able to have a break from caring is very important to them. It is vital to provide a range of carer breaks. The value of having a break has become even more evident as a result of the COVID-19 pandemic, which reduced access to many care and support services.
18. Carers viewed the proposals to develop new Short Breaks services as an opportunity to ensure staff are qualified and skilled to deliver services to individuals with more complex needs and services are safe and of high quality.
19. Carers support offering a range of options that enables their loved one to develop their skills and engage in their communities, thus having a positive experience.
20. ASC continues to engage, seek feedback, and update stakeholders via the Learning Disability Partnership Board, the Autism Partnership Board, the Valuing People Groups, the Autism Reference Group, and the market.
21. Local Surrey County Council ward and District and Borough Councillors have been engaged on our plans for delivering Short Breaks at these sites.
22. Surrey Choices, who currently provide Short Breaks at the Squirrels Banstead, have been involved in discussions on the proposed plans to modernise the Banstead site and improvement of facilities available. The plan will be that the Council will develop the Woking site first so that Surrey Choices will be able to operate from this site whilst the Banstead site is developed.

Risk Management and Implications:

23. Through the development of new Short Breaks accommodation that is fit for purpose, ASC are able to increase the bed capacity, alongside the additional community options, which will enable Carers to have a break and continue to support their individual. Without these resources there will be an increase in Carer breakdown which will result in an additional cost to ASC as long-term placements will be required for individuals.
24. There is a risk that if the new Short Breaks sites are not effectively utilised, service delivery and financial benefits expected for the new accommodation may not be realised. ASC will mitigate this through working closely with residents with support needs and their Carers to identify individuals who can be most effectively supported in the new Short Breaks accommodation.
25. Delivery of the new buildings is subject to planning consent; the programme includes an allowance of 6 months to obtain planning approval via Regulation 3 but if approval is delayed the start date for each development will be affected.

Financial and Value for Money Implications:

26. The development of the proposed new Short Breaks accommodation will involve SCC committing capital expenditure to fund the cost of developing the sites. There will also be costs associated with the operating the sites and maintaining them over their lifecycle. This information is commercially sensitive and so is set out in Part 2 of this paper.

27. The development of the proposed two new Short Breaks sites will have two main financial benefits.
28. Firstly, it is expected that the two new sites will lead to a reduction in the cost per night across all the Short Breaks services purchased by ASC. Currently ASC funds 4,659 nights of Short Breaks support per annum at a total cost of £1,429k so an average cost per night of £306.67. It is anticipated that the development of the new Short Breaks accommodation will enable the average cost per night to be reduced to £237.22. This factors in both the estimated cost per night of care at the proposed new Short Breaks facilities and reduced cost of existing Short Breaks settings by enabling people with more moderate needs to receive care in the new settings as opposed to higher cost settings currently. This is expected to result in a cashable saving of £324k per annum that will help to mitigate a proportion of the financing and operating costs of the sites as set out in Part 2 of this paper.
29. Secondly, additional ASC care package expenditure will be avoided by preventing breakdown of current caring arrangements through the creation of additional Short Breaks capacity. The creation of the two new proposed Short Breaks sites is estimated to add capacity of 3,953 nights of shorts breaks care in Surrey. Based on 28 average number of nights of care per client, that would enable 141 more people with a learning disability and/or autism to receive Short Breaks care per annum. As set out in this paper, Short Breaks services give respite to families who care for family members who have a learning disability and/or autism throughout the rest of the year.
30. Without the increased Short Breaks capacity that these new sites would offer, it is anticipated that over time these family caring arrangements would break down at which point the Council would need to fund support for individuals in permanent supported living accommodation at an additional estimated care package cost of almost £38,000 per annum.
31. Profiling potential carer breakdown due to insufficiency of Short Breaks accommodation if these two new sites were not to be developed, it is estimated that £305m of additional ASC care package costs could be avoided over the 60-year life of the new accommodation equivalent to £5.1m per year on average. Although this will not fund the cost of developing the new accommodation because these benefits are avoiding future increased costs rather than reducing current care package expenditure, the scale of cost avoidance clearly demonstrates the positive financial impact of developing the new accommodation alongside the benefits for residents.

Section 151 Officer Commentary:

32. Although significant progress has been made to improve the Council's financial position, the financial environment remains challenging. The UK is experiencing the highest levels of inflation for decades, putting significant pressure on the cost of delivering our services. Coupled with continued increasing demand and fixed Government funding this requires an increased focus on financial management to ensure we can continue to deliver services within available funding. In addition to these immediate challenges, the medium-term financial outlook beyond 2022/23 remains uncertain. With no clarity on central government funding in the medium term, our working assumption is that financial resources will continue to be constrained, as they have been for the majority of the past decade. This places an onus on the Council to continue to consider issues of financial

sustainability as a priority in order to ensure stable provision of services in the medium term.

- 13
33. In this context the Section 151 Officer recognises the importance of developing new Short Breaks accommodation to both meet service demand, deliver cashable savings to the Council and avoid very significant additional care package costs that would otherwise likely be incurred without the new sites. The Section 151 Officer can confirm that the cost of developing this accommodation is already included in the Council's approved capital programme. The Part 2 report has more information about the development costs and capital funding requirement.
 34. To achieve the expected financial benefits, it will clearly be important to ensure the new sites are effectively utilised alongside existing Short Breaks accommodation to maximise usage across all the Short Breaks services ASC can commission, recognising residents have a wide range of support needs. The Section 151 Officer therefore recommends this is carefully planned in the run up to the new accommodation becoming operational and then closely monitored from that point to enable commissioning plans to be adjusted accordingly so the sites are used to best effect and value for money.

Legal Implications – Monitoring Officer:

35. This paper sets out proposals to re-model the Short Breaks offer provided by the Council to facilitate fit for purpose options for those with learning disabilities and/or autism.
36. Approval is sought by Cabinet to endorse capital funding of £12.24m which will enable the design and construction of two Short Breaks sites identified in Reigate & Banstead and Woking.
37. The Council is empowered by legislation to undertake a range of activities, including (but not limited to) extensive works/ development of land for the benefit or improvement of its area. As site specific information is made available tailored legal advice can be provided to ensure that the Council meets its legal obligations.
38. Cabinet is under fiduciary duties to residents in utilising public monies. In considering this business case Cabinet Members will want to satisfy themselves that the recommendations represent an appropriate use of the Council's resources.
39. When procuring a developer to develop the identified sites, the relevant legislation applicable at the time related to the procurement will be followed, with specific legal advice given to ensure that the regulations are met.

Equalities and Diversity:

40. An initial Equality Impact Assessment (EIA) is included as Appendix 2. This considers the particular implications of Short Breaks for people with one or more protected characteristics.
41. Positive impacts identified at this stage centre on:
 - Residents' improved experience and outcomes
 - Accommodation that is fit for purpose
 - Accommodation that is fit for the future
 - Increased choice and control for individuals (and their carers/families).
 - Developing additional opportunities to overnight short breaks.
 - Support Carers to plan for the future needs of their cared for individuals.

Other Implications:

42. The potential implications for the following Council priorities and policy areas have been considered. Where the impact is potentially significant a summary of the issues is set out in detail below.

Area assessed:	Direct Implications:
Corporate Parenting/Looked After Children	No significant implications.
Safeguarding responsibilities for vulnerable children and adults	The actions in the strategy can positively impact in terms of safeguarding, ensuring that vulnerable adults have access to appropriate care and support services designed around them.
Environmental sustainability	<p>The surveys listed below have been completed and guided the design of the schemes. No impacts to the environment were identified.</p> <ul style="list-style-type: none"> • Acoustic / noise • Air quality • Arboriculture / tree survey • Archaeology desk study • Bat presence and hibernation surveys • Biodiversity desktop and net gain assessment • CCTV below ground drainage survey • Daylight assessment • Geo-environmental desktop study • Topographical survey • Underground utilities survey
Compliance against net-zero emissions target and future climate compatibility/resilience	<p>Consistent with the Council's Net-Zero Carbon target, the buildings will be designed to be operationally net-zero and future-proofed to be adapted and resilient to the impacts of climate change.</p> <p>The key features of an operationally net-zero carbon building include: high thermal efficiency, a low carbon heating system, and maximising the generation and use of on-site renewable energy.</p> <p>The sites are designed to LETI guidelines and will have the potential to achieve net-zero carbon based on the energy and carbon assessment investigations by the Council's Sustainability Consultant, in line with the Council's Greener Future objectives.</p>

	Materials and construction emissions will be reduced where feasible. The next design stages will address the Green Agenda within the budget allowance for the project and will design solutions to address the agenda, e.g.: Sustainable Drainage Systems, opportunities for rainwater harvesting, irrigation solutions, biodiversity net gain, landscape boundary treatments etc.
Public Health	The actions in the strategy can positively impact on public health outcomes, including reductions in social isolation and/or loneliness; increased wellbeing for residents participating in community opportunities and activities.

What Happens Next:

43. Should Cabinet agree the recommendations the next steps and timescales are:
- Commence public engagement on design proposals for Lakers and Squirrels in April 2023.
 - Submit Planning Application for Short Breaks at Lakers and Squirrels in May 2023.
 - A Short Breaks dashboard will be developed to enable ASC to improve equitable access to and delivery of services by January 2024.

Report Author:

Mary Hendrick, Senior Commissioning Manager, Disabilities, Adult Social Care, 0778 657 7887

Consulted:

People who currently use the services and their families/carers

Surrey Choices

Locally elected representatives associated with the sites.

Officers from local authorities associated with the sites.

Local health partners associated with the sites.

Appendices:

Appendix 1 – Registered providers of Short Breaks services in Surrey

Appendix 2 – Short Breaks Equalities Impact Assessment

Part 2 report

Sources/background papers:

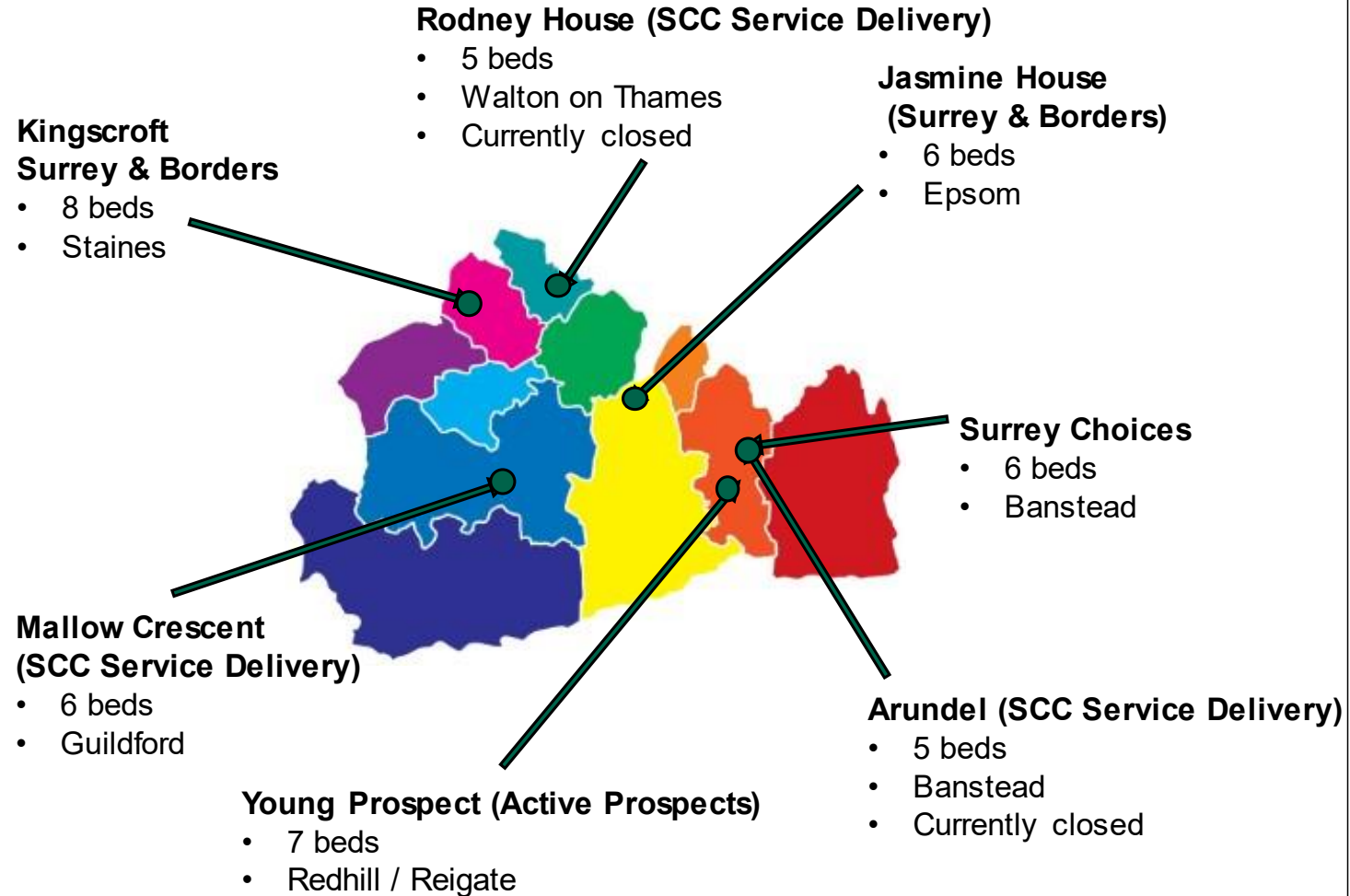
Transformation of accommodation based care and support for working age adults: delivering Supported Independent Living options [Part 1 - Supported Independent Living Report-Cabinet.pdf \(surreycc.gov.uk\)](#)

Supported Independent Living programme – Batch 1 development [Supported Independent Living Programme - Batch 1 Development Part 1 report.pdf \(surreycc.gov.uk\)](#)

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Appendix 1 – Registered providers of Short Breaks services in Surrey

There are currently 7 registered services in Surrey



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Re-Modelling the Strategic Short Breaks Offer for Adults with Learning Disabilities and/or Autism

Did you use the EIA Screening Tool? No

1. Explaining the matter being assessed

Summarise the strategy, policy, service(s), or function(s) being assessed. Describe current status followed by any changes that stakeholders would experience.

This Equality Impact Assessment looks at work by Adult Social Care to review and revise the Short Breaks service for Adults with Learning Disabilities and Autism (LDA) in Surrey. Short Breaks give people with learning disabilities and/or autism an opportunity to share experiences and socialise in their community outside of their family home, whilst enabling their family carer, to maintain their own health and well-being by providing them with a break from their caring responsibilities.

Surrey County Council's (the Council) Short Breaks offer needs to be redesigned so that it can provide a more diverse range of community support alongside modern fit for purpose overnight accommodation for individuals with eligible needs, so that carers can have a break from their caring responsibilities.

Short Breaks - their purpose

To promote Carers wellbeing and enable them to have a break from their caring responsibility, but still be able to support the individual to live at home.

To enable residents with learning disabilities and/or autism who meet the Council's eligibility criteria for Adult Social Care (ASC) funding to have their need for overnight Short Breaks met in a modern, fit for purpose setting with all the necessary facilities and amenities.

To promote the independence of Surrey residents with learning disabilities and/or autism and enable them to remain in their family homes and connected to their local community.

To ensure that together with our partners we develop a range of options that improve outcomes and support for individuals and their families when offering a short break.

To make an essential contribution towards the Council's strategic objective to tackle health inequality, in line with the 2030 Community Vision for Surrey.

Why we are reviewing our current offer:

The Council has historically mainly offered a traditional bed-based approach to providing a short break with a lack of alternative offers.

Equality Impact Assessment

13 Currently there are 7 registered bed based Short Breaks services in Surrey, providing 42 beds per night but only five services are operational. The two sites that are non-operational are Arundel House, which has closed as the fabric of building is no longer suitable to meet the assessed needs of individuals requiring a short break; and Rodney House, closed because the site is de-registering and being re-purposed to provide Supported Independent Living through the Accommodation with Care and Support Strategy. Of these 5 services currently operating, Mallow Crescent at Burpham in Guildford is an in-house service run by ASC Service Delivery and the others are commissioned external services.

The review of services found that the current geographical locations favour the East/Mid Surrey and there is currently limited provision in the North/West area of Surrey. The built environment for much of the service is not fit for purpose and is not suitable to support the future needs of individuals with behaviour that challenges and/or who have complex needs.

The remaining five sites provide access to 32 beds per night across Surrey. But this bed capacity is often reduced to cater for the increasingly complex needs of individuals, particularly those with behaviour that challenges, to ensure that the needs of the individuals' accessing services at any one time can be met safely by staff.

During the COVID-19 pandemic most of our Short Breaks services closed or operated a reduced service. Initially, family carers appeared to cope, but the extended duration of the COVID-19 pandemic saw families in need of support and more open to accepting alternative non-bed based Short Breaks support. This offer included:

- Crossroads Care Surrey, a carers support Charity, extended its sitting services for carers of individuals in transition.
- Spot purchasing more home-based care for people with learning disabilities to give carers a break within the home.
- Outreach services to provide a few hours support to individuals outside the family home.
- Surrey Choices, the Council's Local Authority Trading Company focused primarily on the delivery of community support services to people with a learning disability and/or autism setting up a flexi break service to provide day support at weekends.

Positive feedback from families about the alternative services offered during the pandemic has resulted in working with the market to develop a cost-effective offer that is sufficiently diverse to respond to differing needs and reflects the level of the different models of provision required. The pandemic also highlighted that some of our bed-based services needed to be modernised so that they could offer fit for purpose accommodation that would have ensuite facilities, environment to support individuals who had mobility problems and sensory room for individuals.

Demand for short breaks

Currently, 1,345 adults with learning disabilities and/or autism live with family carers who are open to Adult Social Care. Not everyone needs overnight support but may require alternative options to sustain care support arrangements, i.e. day services.

The age profile of adults with learning disabilities and/or learning disabilities living with family carers, are 209 individuals aged 40+, including 104 individuals aged 50+.

Equality Impact Assessment

Of the 1,345 adults living with family carers, 635 individuals have a diagnosis of Autism.

The needs of the learning disability and/or autism population have changed over the past 10 years, with greater prevalence of behavioural needs and of complex needs. Currently, many families use services that are known to them and are reluctant to change from these although there may be alternatives which could meet their needs. Where this happens, it can result in difficulty in matching need and demand for others.

Targeted work has started with all families, focussing on those supporting individuals who are aged 50 and over. It is vital plans are in place for the care and support of their son or daughter.

ASC practitioners are engaging families and helping them understand that there are a range of alternatives for Short Breaks in addition to overnight stays. These include:

- Home based care support, which is provided in the home to allow the carer to take time out. This may or may not include personal care and may include short trips out from the home with the cared for person.
- Outreach support (including via a Personal Assistant for example) to take the person with care/support needs out to an activity or to learn a skill. This provides the carer with a break and the person they care for continues to develop their skills and take part in activities they enjoy.
- Day care opportunities and extended evenings where the person being cared for spends time in an appropriate setting to allow the carer to have a break.
- A flexi-break during the day on Saturday or Sundays.
- A flexi-break overnight with friends (rather than a break in a residential setting).
- Shared Lives scheme offers over-night support where the person being cared lives in Shared Lives carer's family household for a short while.

All these options can be purchased using a Direct Payment paid by the Council based on a person's assessed Care Act eligible needs.

Engagement

Engagement and evidence were gathered via the following groups and methods:

- Discussions with families who use and require short breaks.
- Discussions with the Learning Disability Partnership Board and Autism Partnership Board.
- Discussions with Local Valuing People Groups – local groups in each of the four areas of Surrey where we discuss issues with people who use services.
- Discussions with the Learning Disability provider market
- Discussion sessions with practitioners in ASC LD Teams
- Individual meetings between Commissioning Managers and all providers who offer Short Breaks

The key finding from our engagement discussions were that ASC needed to:

- Provide a complete range of short breaks to meet a wide range of needs.
- Provide to carers information on types of offer, availability and how to access short breaks – have a clear offer that is communicated to families and make them aware of alternatives to traditional offer.
- The menu of services developed need to be reliable and accessible.
- Ensure continuity of relationship between carers/users and care staff/service

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- Provide centrally co-ordinated response to emergencies
- Plan for next steps, move on plans
- Address age related opportunities to offer appropriate options.
- Need new developments that are fit for purpose.
- Map and analyse the current and future demand so aware of need for health provision
- That there is a link to the Carers Strategy
- Address equity and consistency.
- Address the workforce challenges

How does your service proposal support the outcomes in the Community Vision for Surrey 2030?

The Community Vision for 2030 promotes the independence of the individual in all scenarios and underpins the approach taken by ASC to the delivery of care and support. The Supported Independent Living Strategy seeks to ensure that adults with LD and/or Autism are supported to '*live healthy and fulfilling lives, are enabled to achieve their full potential and contribute to their community*'. The Vision's commitment that '*no one is left behind*' has particular resonance for the target group of the strategy.

The delivery of the Strategy examines how a number of the underpinning ambitions of the Vision will be achieved for adults with LD and/or Autism:

- *Everyone has a place they can call home, with appropriate housing for all*
- *Everyone gets the health and social care support and information that they need at the right time and place*
- *Everyone benefits from education, skills and employment opportunities that help them succeed in life*
- *Communities are welcoming and supportive, especially of those most in need, and people feel able to contribute to community life* *Everyone lives healthy, active and fulfilling lives, and makes good choices about their wellbeing*

Are there any specific geographies in Surrey where this will make an impact?

The Review will address provision county-wide (and also includes services delivered out of county where necessary).

Assessment team

- Anna Waterman
- SCC
- Lead Commissioner, Disabilities

- Mary Hendrick
- SCC
- Senior Commissioning Manager, Disabilities

- Stuart Deacon
- SCC Project Officer

2. Service Users / Residents

AGE

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

Currently, the ASC Learning Disability and Autism Team have 4,041 open cases and the Transition Team have 1,528 people with open cases.

There are currently 1,345 individuals with learning disability or autism living with family carers. The table below shows the breakdown of individuals by age living with family carers.

Age individual	Under 18	18-19	20-30	31-39	40-49	50+	Grand Total
Living with family carers	108	161	643	224	105	104	1,345

According to recent research, 11 million people (21%) in the UK are digitally disadvantaged. In Surrey, an estimated 200,000 people suffer from digital exclusion. Digital exclusion is inextricably linked to wider inequalities in society and is more likely to be faced by people over 65. *(Source Surrey-I)*. Engagement with staff from the Children with Disabilities (CwD) Team also stated that many children and their families/carers also are digitally excluded. Being digitally excluded can be a barrier for people to participate in many aspects of daily life including access to government services. *(Source Surrey –I)*

Positive Impacts

- A wider range of Short Breaks options available across the county developed through strength based approaches and which match needs and can be deployed flexibly to maximise choices for adult individuals of different ages and their families.
- Programme of targeted reassessments focussing initially on those people living with carers aged over 50, so that people in this category are prioritised for a robust plan for suitable short breaks options and appropriate long-term planning.
- Development of new sites to enable adults with learning disabilities and/or autism who meet the Council’s eligibility criteria for Adult Social Care (ASC) funding to have their need for overnight Short Breaks met in modern, fit for purpose settings with all the necessary facilities and amenities suited to individual circumstances, including age.
- Better information to family carers of all ages about the range of accessible options, with practitioner support to make choices about what is available and what is suitable for different situations and individuals.
- Prioritising a move to long term accommodation and care solutions for those with older family carers will help ensure stable arrangements for those whose age may otherwise

Equality Impact Assessment

mean a solution might have to be found in an emergency should a break down in care or family death occur.

13

Negative Impacts

- Changes to established pattern of provision for those with older carers may lead to anxiety/resistance.

Describe here suggested mitigations to inform actions needed to reduce inequalities.

- Contingency planning for older carers (which goes beyond Short Breaks).
- A structured process of communication and engagement with families to inform them about the options suitable for their situation.
- Possibility for families to try new activities such as the flex choices activities run on Saturdays or weekday evenings, or outreach support.
- Encourage families to visit various overnight service options if they haven't used them before to find out more about them.
- Signposting families to the carers network for support/connection and discussion with other carers.
- Clear guidance support to inform practitioners of the options suitable for individuals and have the conversations around choices with families.
- Introduction and use of a short breaks service dashboard to enable service managers to monitor the delivery of short breaks service in real time and address any issues with operationalising the revised approach.
- Revision to public website or other sources of information which families may use.
- Ensure that all information and documents are available as a printed version so that practitioners can provide these to people who are digitally excluded or who require large print.
- Ask our networks to disseminate information via their forums, through phone calls or in writing.
- Designs for the new facilities are fully accessible.

What other changes is the council planning/already in place that may affect the same groups of residents? Are there any dependencies decision makers need to be aware of?

Strengths Based Practice

Adult Social Care is transforming how it delivers services in Surrey. It is employing a 'strengths based' approach which encourages individuals to focus upon their strengths, connect to their community and live as independently as possible. The Independent Living programme does promote a 'strengths based' approach to supporting individuals in their community, by providing them with suitable accommodation options outside of residential and institutional settings. The Independent Living programme will continue to be developed to support the ambitions of Adult Social Care's 'strengths based' working.

Carers strategy

Equality Impact Assessment

Implementation of a new carers' strategy to support the health and wellbeing of carers of all ages so they can continue in their caring role.

Accommodation with Care and Support

Designing and developing new accommodation to support needs for people with Learning Disabilities.

Any negative impacts that cannot be mitigated?

None known.

DISABILITY

13

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

All individuals affected by this strategy will have a disability and some may have multiple disabilities. The programme of work covers people with a learning disability and/or autism as their primary care need however some of these individuals may also have physical and sensory disabilities or mental health problems.

JSNA – The prevalence of depression is slightly higher in adults with a learning disability in Surrey (13.2% v 11% nationally) and the prevalence of severe mental illness is much higher across all age groups (8% v 0.7%). After adjusting for differences in age and sex profile, adults with a GP recorded learning disability in Surrey are 8.4 times more likely to have a severe mental illness.

JSNA – The prevalence of epilepsy is significantly higher among those with a recorded learning disability in Surrey – 18.3% v 0.5% all ages.

It is a long term trend that growing numbers of people with a learning disability have complex needs.

Positive Impacts

- A range of Short Breaks options available across the county developed through strengths-based approaches and which match needs and can be deployed flexibly to maximise choices for individuals with a disability and families.
- A needs led approach to Short Break allocation which prioritises those with the highest level of disability needs and ensures services are available on a basis of equity.
- The circulation of improved information about the range of options available, with practitioner support to make choices about what is available and what is suitable for different situations.
- More specialist provision for Short Breaks, enabling clear support options for those with specific physical or behavioural needs.
- Equitable provision across the county and across the different types of disability needs and families.
- New builds are ground floor, wheelchair accessible and have ensuite facilities. Equipped with a sensory room and outside spaces.
- The introduction of an ongoing training programme to ensure staff when working with people with learning disabilities and/or autism have the appropriate skills.

Negative Impacts

- Process of change leads to anxiety/friction for people with a learning disability.

Describe here suggested mitigations to inform actions needed to reduce inequalities.

- Contingency planning for older carers (which goes beyond Short Breaks).
- A structured process of communication and engagement with families to inform them about the options suitable for their situation.

Equality Impact Assessment

- Possibility for families to try new activities such as the flexichoices activities run on Saturdays or weekday evenings, or outreach support.
- Encourage families to visit various overnight service options if they haven't used them before to find out more about them.
- Signposting families to the carers network for support/connection and discussion with other carers.
- Clear guidance support to inform practitioners of the options suitable for individuals and have the conversations around choices with families.
- Introduction and use of a short breaks service dashboard to enable service managers to monitor the delivery of short breaks service in real time and address any issues with operationalising the revised approach.
- Revisions to the public facing website or other sources of information which families may use.
- Ensure that all information and documents are available as a printed version so that practitioners can provide these to people who are digitally excluded or who require large print.
- Ask our networks to disseminate information via their forums, through phone calls or in writing.
- Designs for the new facilities are fully accessible.

13

What other changes is the council planning/already in place that may affect the same groups of residents? Are there any dependencies decision makers need to be aware of?

As per those identified for Age.

Any negative impacts that cannot be mitigated?

None known.

GENDER REASSIGNMENT

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

There is no data currently available either nationally or locally regarding the number of people who are in the process of transitioning from one gender to another.

We do not have any evidence of the impact identifying as transgender may have on access to carers services. However, there is evidence that shows members of the transgender community have poorer experiences of care and poorer outcomes, including a fear of accessing care and support, with particularly detrimental impact on their psychological wellbeing (House of Commons Women and Equalities Committee, Transgender Equality Report 2016; Trans healthcare: What can we learn from people's experiences? (Healthwatch 2020)).

Positive Impacts

- The proposed new care facilities will have accommodation provision which allows people staying to have privacy with their own ensuite facilities.

Equality Impact Assessment

- Future provision of shared lives services may allow provision which is designed to meet the specific care needs of people affected by gender assignment/gender dysphoria.

13 Negative impacts

None known.

What other changes is the council planning/already in place that may affect the same groups of residents? Are there any dependencies decision makers need to be aware of?

None known.

Any negative impacts that cannot be mitigated?

None known.

RACE

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

LAS data (September 2020) indicates that the majority of the 4179 adults whose primary support need is a learning disability are White British (3651 individuals/87%). The remaining 13% of individuals include those from Asian, mixed ethnic backgrounds and Black, Chinese and Arabic backgrounds. This 13% also includes a proportion of individuals for whom race is not recorded.

Positive Impacts

- We will ensure peoples cultural preferences are supported in the services they use via training for staff and the environment.
- The specifications for commissioned services will require the providers to ensure that their support is accessible and welcoming to all those using them. The specifications will require the provider:
 - to co-design and co-produce new resources and materials alongside partners and with community leaders to improve access to our services for ethnic minority communities;
 - to provide accessible information for people for whom English is an additional language; and
 - to report on the ethnicity of the people who use their services and illustrate how they are ensuring their support is appropriately tailored to meet the needs of different ethnic groups and communities.
- To identify ways to proactively reach in to communities across Surrey to understand their experiences and provide a confidential route for them to share their views and experiences in their own voice.

Equality Impact Assessment

Negative Impacts

None identified.

Describe here suggested mitigations to inform actions needed to reduce inequalities.

- Ensure information relating to short breaks is accessible to all including in other languages.
- Appropriate equality, diversity and inclusion training for staff including awareness of the needs and preferences of people of different ethnicities will be required via providers.

What other changes is the council planning/already in place that may affect the same groups of residents? Are there any dependencies decision makers need to be aware of?

None known

Any negative impacts that cannot be mitigated?

None known

RELIGION AND BELIEF

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

The Surrey-I reports that **Christianity** is the largest religion in Surrey with 711,110 people (62.8% of the population). 5% of the population (56,390) reported a non-Christian religion. Within the non-Christian religions, Muslim was the largest group with 24,378 people (2.2%), followed by Hindu with 15,018 people (1.3%)

LAS data (September 2020) indicates that of the 4179 adults whose primary support need is a learning disability 1757 individuals identify themselves as Church of England (42%) and 759 individuals identify themselves as not having a belief or religion (18%). 30% of the 4179 individuals identify across a wide range of religious beliefs including Roman Catholic, Christian (incl. Greek Orthodox, Methodist and Pentecostal) Jewish, Baptist, Muslim, Islam and Hindu. In addition, there are a small proportion of people who declined to give this information (4%) and a further small proportion (6%) for whom this information is not recorded.

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

Positive Impacts

- We will ensure through services specifications and service monitoring that service providers are sensitive to the religion and beliefs of carers and the cared for person.

Equality Impact Assessment

Negative Impacts

None anticipated.

13

What other changes is the council planning/already in place that may affect the same groups of residents? Are there any dependencies decision makers need to be aware of?

None known

Any negative impacts that cannot be mitigated?

None known

SEX

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

LAS data (September 2020) indicates that of the 4179 adults whose primary care need is a learning disability, 1685 (40%) are female and 2494 (60%) are male.

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

Positive Impacts

- The specifications for commissioned services will require the provider to report on the gender identity of the people who use their services and illustrate how they are ensuring their support is appropriately tailored to meet the needs of men and women.
- Accommodation options for short breaks will have single occupancy rooms with ensuite facilities to maximise privacy for people

Negative Impacts

None anticipated

What other changes is the council planning/already in place that may affect the same groups of residents? Are there any dependencies decision makers need to be aware of?

None known

Any negative impacts that cannot be mitigated?

None known

SEXUAL ORIENTATION

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

Whilst there are no clear national statistics on LGBTQ+ carers, Stonewall estimates that 5-6% of the population are LGBTQ+ and based on this estimate we can calculate that there are potentially 5,750 LGBTQ+ carers in Surrey.

The Stonewall report *“Unhealthy Attitudes” – The Treatment of of LGBT people within Health and Social Care* reported that at a national level there was evidence that staff in health and social care professions have witnessed other colleagues being discriminated against or provide a patient or service user with poorer treatment because they identify as LGBTQ+.

Positive Impacts

- A wider choice of short breaks options may make it easier for individuals to disclose their sexual orientation and to identify a service which best fits their situation
- Our specification for commissioned services will require providers to:
 - capture equality monitoring data, including sexual orientation;
 - provide assurance that their services and support take account of and are appropriately tailored in order to identify and address the needs, or experiences, of people who identify as LGBTQ+ (the carer or the person/s they care for); and
 - report to commissioners when carers and/or the person/s they care for express concerns regarding how their sexual orientation or that of the person they care for might affect their ability to access appropriate care and support.

Negative Impacts

None anticipated

What other changes is the council planning/already in place that may affect the same groups of residents? Are there any dependencies decision makers need to be aware of?

None known

Any negative impacts that cannot be mitigated?

None known

CARERS

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

It is anticipated that as family carers age the request for Short Breaks will increase. There are currently 1,345 individuals living with family carers in Surrey.

Equality Impact Assessment

JSNA (Carers Chapter) - Surrey has a higher number of carers of people with a learning disability than in other parts of the country, owing to the historically and disproportionately high learning disability population.

13

According to the 2011 Census and population projections, in 2016 there were predicted to be 1,400 adults in Surrey (aged 18-65) with a moderate or severe learning disability who are living with their parents. This suggests that they could be 'mutual carers' who are helping to care for parents so that both parents and adult offspring can remain living at home.

JSNA (LD Chapter) There is little accurate data available on carers by the condition of the person being cared for. Carers of people with a learning disability and/or autism will often have unique caring situations, and many will experience a lifetime of caring, and with people with learning disabilities living longer and fuller lives, the caring role has extended.

Caring has significant implications for all aspects of a carer's life.

Caring can be a lonely experience, as shown in research, including the [Getting Carers Connected](#) and [The World Shrinks](#) reports produced Carers UK in 2019. The report [Caring and COVID-19 Loneliness and use of services](#) shows that carers were more likely to have felt lonely than other people. The report also shows that during the lockdown, 9 in 10 carers awaiting an NHS treatment had it postponed or cancelled. Carers also found it more difficult than other people to get in-patient services, to access their GP or to use the vital NHS111 service. Beyond the NHS, half of carers who needed formal care could not get this support. During 'lockdown' carers were seven times more likely to be lonely than people who are not carers. Carers reported they were often lonely at work, but equally that work could be an important touchpoint that reduced loneliness.

The approach to short breaks will focus on supporting the caring role of all relevant carers in Surrey and carers who live outside Surrey but who provide care for residents of Surrey.

Positive Impacts

- A range of Short Breaks options available across the county developed through strength-based approaches and which match needs and can be deployed flexibly to maximise choices for individuals and families with caring responsibilities.
- A needs' led approach to Short Break allocation which prioritises those with the assessed highest level of needs and ensures services are available on a basis of equity.
- Better information about the range of options, with practitioner support to make choices about what is available and what is suitable for different carer situations.
- Prioritising a move to long term accommodation and care solutions for those with older family carers will help ensure stable arrangements for those whose age may otherwise mean a solution might have to be found in an emergency should a break down in care or family death occur.

Negative Impacts

- Process of change leads to anxiety/friction for carers.
- Some people may receive a smaller amount of short break service than hitherto where needs based assessment indicates that they do not require as much as they may have been used to which may impact upon carers.

Equality Impact Assessment

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

Contingency planning for older carers (which goes beyond Short Breaks).

A structured process of communication and engagement with families to inform them about the options suitable for their caring situation.

Possibility for families to try new activities such as the flexichoices activities run on Saturdays or weekday evenings, or outreach support.

Encourage families to visit various overnight service options if they haven't used them before to find out more about them.

Signposting families to the carers network for support/connection and discussion with other carers.

Clear guidance support to inform practitioners of the options suitable for individuals and have the conversations around choices with families.

Introduction and use of a short breaks service dashboard to enable service managers to monitor the delivery of short breaks service in real time and address any issues with operationalising the revised approach.

Revision to public website or other sources of information which families may use.

Ensure that all information and documents are available as a printed version so that practitioners can provide these to people who are digitally excluded or who require large print.

Ask our networks to disseminate information via their forums, through phone calls or in writing.

Designs for the new facilities are fully accessible.

What other changes is the council planning/already in place that may affect the same groups of residents? Are there any dependencies decision makers need to be aware of?

Carers strategy

Any negative impacts that cannot be mitigated?

None known

3. Staff

13

The majority of Short Breaks services for adults with Learning Disabilities and /or autism in Surrey are sourced through the independent care sector but some are provided by ASC Service Delivery at Mallow Crescent at Burpham in Guildford.

There are no plans to change the availability or nature of the Mallow Crescent service and no changes are planned to the usage of the existing facilities on site.

Positive Impacts for staff - All characteristics

Changes to the overall short breaks offer and the ongoing development of a range of service types for people with learning disabilities/autism and their families may possibly create new opportunities for staff to develop their careers.

DISABILITY

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

Negative

- Staff who are deaf or have a hearing impairment may require an interpreter for training offered as part equality diversity and inclusion awareness.
- Staff with a visual impairment may require training materials to be provided as part of equality diversity and inclusion awareness to be in appropriate format to meet their needs as part.

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

- Relevant training materials and other documents will be provided in suitable accessible formats.

What other changes is the council planning/already in place that may affect the same groups of residents? Are there any dependencies decision makers need to be aware of?

None.

Any negative impacts that cannot be mitigated?

None.

4. Recommendation

Based your assessment, please indicate which course of action you are recommending to decision makers. You should explain your recommendation below.

- **Outcome One: No major change to the policy/service/function required.** This EIA has not identified any potential for discrimination or negative impact, and all opportunities to promote equality have been undertaken
- **Outcome Two: Adjust the policy/service/function** to remove barriers identified by the EIA or better advance equality. Are you satisfied that the proposed adjustments will remove the barriers you identified?
- **Outcome Three: Continue the policy/service/function** despite potential for negative impact or missed opportunities to advance equality identified. You will need to make sure the EIA clearly sets out the justifications for continuing with it. You need to consider whether there are:
 - Sufficient plans to stop or minimise the negative impact
 - Mitigating actions for any remaining negative impacts plans to monitor the actual impact.
- **Outcome Four: Stop and rethink the policy** when the EIA shows actual or potential unlawful discrimination. (For guidance on what is unlawful discrimination, refer to the [Equality and Human Rights Commission's guidance and Codes of Practice on the Equality Act](#) concerning employment, goods and services and equal pay).

Recommended outcome:

Outcome One: No major Change to the policy/service/function required.

Explanation:

From this EIA there are some minor elements of the Short Breaks process action plan to ensure that potential impacts for residents with protected characteristics are managed in the most supportive way.

Further information to be collected through ongoing service monitoring through the life of the Short Breaks strategy.

5. Action plan and monitoring arrangements

Insert your action plan here, based on the mitigations recommended.

Involve you Assessment Team in monitoring progress against the actions above.

Item	Initiation Date	Action/Item	Person Actioning	Target Completion Date
1	April 2023	<p>Actions</p> <p>Contingency planning for older carers (which goes beyond Short Breaks).</p> <p>A structured process of communication and engagement with families to inform them about the options suitable for their situation.</p> <p>Possibility for families try new activities such as the flexichoices activities run on Saturdays or weekday evenings, or outreach support.</p> <p>Encourage families to visit various overnight service options if they haven't used them before to find out more about them.</p> <p>Signposting families to the carers network for support/connection and discussion with other carers.</p> <p>Clear guidance support to inform practitioners of the options suitable for individuals and have the conversations around choices with families.</p> <p>Introduction and use of a short breaks service dashboard to enable service managers to monitor the delivery of short breaks service in</p>	Mary Hendrick	2025

Equality Impact Assessment

	<p>real time and address any issues with operationalising the revised approach.</p> <p>Revision to public website or other sources of information which families may use.</p> <p>Ensure that all information and documents are available as a printed version so that practitioners can provide these to people who are digitally excluded or who require large print.</p> <p>Ask our networks to disseminate information via their forums, through phone calls or in writing.</p> <p>Designs for the new facilities are fully accessible.</p> <p>Training courses and materials for staff to be provided in formats appropriate to the needs of those who are deaf or who have visual impairment</p>		
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6a. Version control

Version Number	Purpose/Change	Author	Date
1	First draft EIA	Stuart Deacon	4 October 2022

Version Number	Purpose/Change	Author	Date
2	Commissioning Team input	Mary Hendrick	6 March 2023
3	Feedback on behalf of Directorate Equalities Group	Kathryn Pyper	8 March 2023
4	Final revisions	Stuart Deacon	9 March 2023

The above provides historical data about each update made to the Equality Impact Assessment.

Please include the name of the author, date and notes about changes made – so that you can refer to what changes have been made throughout this iterative process.

For further information, please see the EIA Guidance document on version control.

6b. Approval

Secure approval from the appropriate level of management based on nature of issue and scale of change being assessed.

Approved by	Date approved
Jon Lillistone, Head of Service	8 March 2023
Kathryn Pyper, ASC EDI Lead Directorate Equality Group	8 March 2023

Publish:

It is recommended that all EIAs are published on Surrey County Council's website.

Please send approved EIAs to: **INSERT SHARED EMAIL ACCOUNT ADDRESS**

EIA author:

6c. EIA Team

Name	Job Title	Organisation	Team Role
Stuart Deacon	Project Officer	SCC	drafting
Mary Hendrick	Senior Commissioning Manager	SCC	drafting
Anna Waterman	Lead Commissioner for Disabilities	SCC	drafting

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SURREY COUNTY COUNCIL**CABINET****DATE: 28 MARCH 2023****REPORT OF CABINET MEMBER: MATT FURNISS, CABINET MEMBER FOR TRANSPORT, INFRASTRUCTURE AND GROWTH****LEAD OFFICER: KATIE STEWART, EXECUTIVE DIRECTOR FOR ENVIRONMENT, TRANSPORT AND INFRASTRUCTURE****SUBJECT: ELECTRIC TOWNS AND CITIES INITIATIVE (ETCI) A3 AIR QUALITY PROJECT****ORGANISATION STRATEGY PRIORITY AREA: TACKLING HEALTH INEQUALITY/ENABLING A GREENER FUTURE****Purpose of the Report:**

The Electric Towns and Cities Initiative (ETCI) is a measure to support the legal requirement for National Highways (NH) to ensure that the limit value for nitrogen dioxide (NO₂) concentrations across the strategic road network is met in the shortest timescales possible.

The stretch of the A3 running through Guildford has been identified as a priority area for action, having a mean annual NO₂ level of more than double the legal limit. Although National Highways are the responsible highway authority for this stretch of road, Surrey County Council, as the relevant local highway authority, and Guildford Borough Council in its role as the relevant environmental health authority, have a shared interest with National Highways in addressing the issues. Given the focus on Guildford, the Councils are best placed to implement the scheme.

Recommendations:

It is recommended that Cabinet:

1. Approve the receipt of £11m grant funding from National Highways for the A3 air quality scheme through the Electric Towns and Cities Initiative, and proceed with the scheme subject to the approval of a detailed business case by the Council's Capital Programme Panel.
2. Agree that, if the scheme is successful and National Highways allocates further grant to the Guildford A3 scheme within the existing timeframe, the acceptance and spend of the additional grant is delegated to the Director of Highways & Transport, in conjunction with the relevant Cabinet member.

Reason for Recommendations:

There is a legal duty on National Highways, as issued by the Secretary of State for the Environment, to address the NO₂ levels along the A3 in Guildford. This stretch of road has been identified as one of the worst roads for air quality in the country. The County Council, with Guildford Borough Council and National Highways, has a shared interest in addressing the air quality in this area - both from a public health perspective but also in light of our net

zero carbon targets as a county. Residents who are users of the footpaths/cycle paths alongside this stretch of road will benefit from reduced exposure to emissions upon completion of the initiative; as well as a secondary benefit for those who drive electric vehicles having access to additional local charge points. Residents who are employed in organisations/businesses in the local area may also benefit from the travel planning element of the initiative, whereby the opportunity to join a salary sacrifice scheme may be available to encourage the move to electric vehicles.

Executive Summary:

Strategic context

1. The Electric Town and City Initiative (ETCI) is one of National Highway's measures to assist in its legal duty to ensure the limit levels of harmful emissions are met, and so improving air quality, across the strategic road network. The requirement to meet the legal limit values is set out in Government's National Air Quality Plan. National Highway's air quality strategy also sets out the overarching strategic approach to tackling the air quality challenges alongside the Strategic Road Network, alongside the promotion of electric vehicles.
2. It is important to note that this scheme is the first step on a journey to improving air quality on the A3 and environs, and there is a collective desire between National Highways, the Department for Transport, Surrey County Council and Guildford Borough Council to continue to work collaboratively to consider and assess further potential interventions. To consolidate this, there is a stated commitment between National Highways and the Council to work closely together, with the Department for Transport and Guildford Borough Council, to develop future initiatives (see **Annex 1** for the Statement of Future Intent).
3. As well as aligning with National Highway's Net Zero Strategy, leading to reductions in overall CO₂ emissions, the project also has links to the following Council strategies and plans:
 - Surrey Health and Well Being Strategy 2020
 - Climate Change Strategy 2020
 - Surrey Local Transport Plan 2022.
4. This project also aligns with the following Borough's strategies and plans:
 - Corporate Plan 2001-25 (climate change programme to become carbon neutral by 2030 and encouraging businesses to act in more environmentally sustainable ways through their travel and energy choices)
 - Health & Wellbeing Strategy (states that priorities will be revised to take account of emerging issues and air quality is identified as one of these)
 - Guildford Borough Council Air Quality Strategy.

Current position

5. Following the Government's Pollution Climate Mapping exercise in 2018, National Highways completed a more detailed air quality assessment for a number of sections across the strategic road network (SRN), which identified this section of the A3 as having the highest limit value exceedance anywhere on the strategic road network (more than double the legal limit). In simple terms what this means is that this section of road has double the amount of nitrogen dioxide emissions

than the accepted maximum level, more than any other road nationally. The current modelling and monitoring suggests that, if no remedial action is taken, then this limit would continue to be exceeded beyond 2030.

6. The impact of not changing/doing nothing would mean that National Highways would be in breach of the legal requirement to deliver measures to ensure that the annual mean nitrous oxide limit can be met in the shortest timescales possible. Residents and pedestrians / cyclists who live or travel alongside the A3 respectively would continue to suffer poor air quality and associated adverse health impacts.

Options considered

7. As part of the assessment process, in 2020 National Highways commissioned a detailed report on the air quality issue on the A3 through Guildford which included considering the range of measures available to them to support delivery of the compliance. The range of options included the following:
 - Air quality barriers – these are physical fence-like barriers located alongside busy roads to help reduce the concentration of pollutants in adjacent areas. Such barriers need to be 9m high and are frequently curved inwards at the top towards the road. Their installation requires planning permission, and the estimated installation would not be until 2028. There would also be significant disruption resulting from installation and subsequent maintenance work, and this measure alone would be insufficient to meet the legal limit value for emissions. Given these factors, this option is not being proposed at the moment, but National Highways have a team still working on whether they have a role to play in this, and other locations in England and Wales.
 - Speed restrictions - one of the other measures available to National Highways is implementing a 60mph speed limit to help reduce emissions. However, this measure could not be implemented on the A3 through Guildford as the speed limit is already 50mph.
 - Footpath/cycle path relocation – this option would remove residents from close exposure to emissions by moving the paths as currently used. However, this is difficult to achieve for the paths alongside the northbound carriageway. Moving one footpath adjacent to the southbound carriageway may be a possibility but, generally, footpath/cycle path relocation is not considered a viable option in the identified area as, while it may reduce exposure by pedestrians and cyclists, it doesn't address the source of the problem.
 - Implementation of a low emission zone – this measure would be difficult to implement, and enforce, on a trunk road. Vehicles not meeting the required emissions levels would have to leave the A3 (at the Stoke Road junction) and re-join it (at Compton). This would have a significant negative impact on local traffic conditions in Guildford and on existing Air Quality Management Areas (AQMAs).
8. The outcome of this study identified opportunities to focus on local business and road users, who make up about 50% of all journeys on the A3 through Guildford and encourage them to transition across to electric vans and cars. Further informal market research with a number of local businesses that regularly use the A3 identified a willingness and desire to make the transition to an electric van.

However, this work also identified that this would require a financial incentive to make this happen.

9. There were no other substantive traffic management measures identified that could be brought forward to improve air quality on the A3.
10. On this basis, the supporting work completed for the assessment of the air quality impacts on the A3, the review of existing measures available to National Highways to manage air quality and the outcome of the local traffic management study led by Guildford Borough Council identified the ETCl scheme as the only viable traffic led option.

Proposed scheme

11. There are 3 elements to the proposed scheme:

- i). Electrification of commercial fleet

It is proposed to dispense grants to businesses and organisations as a means of encouraging the replacement of diesel commercial vehicles for electric. Light Goods Vehicles make up between 15.4% and 16.4% of the annual average daily traffic flow on the A3 through Guildford (varying between the northbound and southbound directions) equating to about 13,350 vehicles. These vehicles are responsible for between 43.3% and 44.1% of the nitrous oxide (NO_x) emissions for the northbound and southbound directions respectively (2019 data). For this reason, National Highways has determined that this scheme should target commercial vehicles. A government stipulated vehicle scrappage scheme would be required to target domestic cars, something that is outside the remit of National Highways and could not be introduced in the short term. Private car users will be encouraged to shift their mode of travel through the travel planning element of the scheme detailed below.

The aim is to replace up to 1,000 diesel vans currently driven on the A3 with an electric equivalent to help lower roadside NO₂ concentrations. Current trends in electric van uptake in the Surrey region are very low and lagging far behind the uptake of electric cars. This means it will take many years for electric vans to start displacing diesel vans and lead to a reduction in roadside NO₂ concentrations. Adopting a 'business as usual' van replacement approach would not be consistent with the requirement to deliver limit value compliance in the shortest timescales possible.

All local businesses and organisations that use the A3 through Guildford will have equal opportunity to access the grants, with targeted publicity to ensure that local small and medium-sized enterprises are aware of this opportunity and to maximise potential take up in this sector of the local economy. The level of grant is anticipated to be either £10k or £5k per vehicle, dependent on size/weight of the vehicle, and will be paid direct to the vehicle supplier to avoid any potential fraudulent use of any approved grant. Grants will need to be administered to ensure vehicles are used as intended, to protect financial interests, and appropriate checking of companies' suitability before grants are released, including their financial sustainability.

- ii). Charging hubs

Local businesses also identified the lack of appropriate charging points, in terms of size and driver facilities, as a further key constraint to switching to electric vehicles. Therefore the ETCI scheme proposes to introduce more charging hubs in and around the Guildford area that are accessible to commercial vehicles.

iii). Travel planning for local businesses

The ETCI scheme aims to help companies to encourage a mode shift in the way their employees travel to work, by switching to electric vehicles potentially including a salary sacrifice scheme and/or alongside support to make use of other transport options locally e.g. cycling and buses.

Scheme delivery and management

12. The ETCI scheme will be delivered by the County Council, with the support of Guildford Borough Council, over a period of 2 to 3 years.
13. The County Council will be the recipient of the grant and the overall lead for the ETCI project as the highway authority. The scheme will be delivered in collaboration with Guildford Borough Council, as the environmental health authority. In this respect, Guildford Borough Council will be leading on the charging infrastructure and the travel planning elements of the scheme. Depending on the nature of the partnership, a separate agreement may be required between Surrey County Council and partners/contractors. National Highways will continue to be involved in the planning and monitoring of all aspects of the scheme.
14. The activities of the delivery team will be overseen by a Governance Board composed of senior officers and members from the County Council, Guildford Borough Council, National Highways, and the Department for Transport. There are also discussions with the Joint Air Quality Unit (JAQU) to see if they want to be part of the board.
15. The County Council will be responsible for recruiting a small core team (2-3 staff) on a fixed-term basis to deliver the grants element of the ETCI scheme, and will support its functioning with its own internal staff as required. All these costs will be funded from the grant, and this may include communications, legal and finance departments where, and when, required.

Consultation:

16. The ETCI proposal and the measures to be employed that will reduce emissions along the stretch of the A3 running through Guildford levels have been discussed and agreed between National Highways, the County Council and Guildford Borough Council. The Cabinet Member for Transport, Infrastructure and Growth has been part of the early engagement process.
17. Market research with local businesses has helped to shape the potential measures within ETCI, a process that will continue as the project moves toward implementation.

- 14
18. A briefing paper is being prepared for the Chairman of the Communities, Environment and Highways Select Committee, the Cabinet Member for Environment, and for local Members in the location of the scheme.
 19. Residents will not be directly impacted by the delivery of the scheme, as it will be targeted at local businesses in the area. Information for residents will be via press releases and a page on the Council's website dedicated to the project, with other publicity material produced as deemed necessary.

Risk Management and Implications:

20. There is a risk that the scheme does not make a meaningful difference to emission levels along this stretch of the A3 in Guildford. There is limited mitigation for this.
21. There is also a low risk that some measures may be affected by issues around infrastructure and/or planning consent, dependent on location. To mitigate this risk, sites for the location of charging hubs are being sought on land owned by the Councils. There may be a risk of possible delay due to supply chain issues.
22. There is a risk of insufficient take up of grants by businesses to meet the target figure of 1000 new electric vans on the road. This will be reviewed following scheme launch and the loosening of the grant qualification criteria, or reducing the size of the scheme, will be considered. A full risk assessment has been produced, which will be continually reviewed by the project team, and monitored by the Governance Board.
23. A further mitigation is to have an appropriate Governance Board, and project management, involving all 3 parties to the scheme. This is in place. Financial risk to Surrey County Council will be minimised by ensuring that all activity is funded from the grant, and project spend will be monitored and reported to the Governance Board.

Financial and Value for Money Implications:

24. Project costs are expected to be fully funded through National Highways grant, with no requirement for a financial contribution from the Council. Surrey County Council's staffing costs are fully grant funded. Measures will be put in place to limit the Council's exposure to risks, including the risk of additional unforeseen costs, and the Council may also need to consider how future costs (e.g. of maintaining of any new assets and any post-completion monitoring costs) will be minimised or can be transferred entirely to the provider. Where schemes are delivered by partners or contractors, the Council will put in place agreements to manage costs and risks. These factors will be considered as the detailed programme is developed and approved through the Council's existing governance processes.

Section 151 Officer Commentary:

25. Although significant progress has been made to improve the Council's financial position, the financial environment remains challenging. The UK is experiencing the highest levels of inflation for decades, putting significant pressure on the cost of delivering our services. Coupled with continued increasing demand and fixed

Government funding this requires an increased focus on financial management to ensure we can continue to deliver services within available funding. In addition to these immediate challenges, the medium term financial outlook beyond 2022/23 remains uncertain. With no clarity on central government funding in the medium term, our working assumption is that financial resources will continue to be constrained, as they have been for the majority of the past decade. This places an onus on the Council to continue to consider issues of financial sustainability as a priority in order to ensure stable provision of services in the medium term.

26. The recommendation would allow the Council to enter into a funding agreement with National Highways and to receive grant funding. The scheme would proceed subject to agreement of the Council's Capital Programme Panel to a detailed business case, including an assessment of financial, risk, value for money and other relevant factors. As such, the Section 151 Officer supports the recommended approach.

Legal Implications – Monitoring Officer:

27. National Highways have a legal duty to ensure air quality limit values are met in the shortest timescales possible. The Environment Act 2021 requires Government to set legally binding environmental targets for England in priority areas including air quality, The requirement to meet the legal limit values is set out in Government's National Air Quality Plan, as enacted through commissioned activities from DfT and the Joint Air Quality Unit (JAQU). National Highways is required to act to meet these targets.
28. A Funding Agreement between National Highways and Surrey County Council is currently in preparation to cover the terms and conditions of the actual grant funding of £11m. Surrey County Council and Guildford Borough Council, have been asked to implement the scheme on their behalf as the majority of the grant funding (c£9m) is for the use of grants to qualifying companies/organisations,
29. In terms of the grants to businesses, there will be a contract between them and Surrey County Council to cover the terms and conditions of the grant, including the production of data evidence that they have met grant conditions e.g. the requisite number of annual journeys made along the A3 in Guildford for each vehicle.
30. Officers must ensure that the grant scheme meets the subsidy requirements of the Subsidy Control Act 2022 which places an obligation on public authorities, before making a subsidy scheme, to consider the principles in Schedule 1 and ensure that the subsidies provided for by the scheme will be consistent with the principles contained in Schedule 1.
31. The effect of each principle is:
- Principle A: Public authorities will need to consider, explain and assess the policy objective behind the subsidy to ensure there is a benefit to wider society in providing the subsidy.
- Principle B: Subsidies should be both proportionate and limited to what is necessary to achieve the policy objective.

Principle C: Subsidies must incentivise and lead to a change in the behaviour of the beneficiary. They must help to address the public policy objective being pursued.

Principle D: Subsidies should be targeted to bring about an effect that is additional to any that would occur in the absence of the subsidy.

Principle E: Alternative policy levers, that are likely to cause less distortion to competition and investment in the UK, or trade and investment internationally, should be considered before turning to subsidies.

Principle F: Public authorities should design the subsidy in a way that minimises the impact on competition and investment within the UK's internal market. This will require them to assess the effects which are likely to arise from providing the subsidy.

Principle G: Public authorities should assess the material effects on competition and investment in the UK, and international trade and investment, and decide whether the benefits of the subsidy are greater than the harmful impacts of providing the subsidy.

Equalities and Diversity:

32. The County must abide by its Public Sector Equality Duty (s149 of the Equality Act 2010) when exercising its public functions. There is a requirement when deciding upon the recommendations in this report to have due regard to the need to advance equality of opportunity for people with protected characteristics, foster good relations between such groups, and eliminate any unlawful discrimination. The scheme will be open to all businesses and organisations within the agreed area of impact, therefore there is no perceived impact on residents with different protected characteristics. For this reason, an Equalities Impact Assessment (EQIA) has not been completed at this stage.
33. However, an EQIA will be completed to assess the measures proposed for implementation, to ensure that the scheme is fully accessible, particularly as the grant application process and grant qualifying criteria are developed, with appropriate groups involved. This will be reviewed and updated as the project progresses, as part of project evaluation.

Other Implications:

34. The potential implications for the following council priorities and policy areas have been considered. Where the impact is potentially significant a summary of the issues is set out in detail below.
35. The scheme also has links to other Council strategies and plans, as detailed in the executive summary earlier in the report.

Area assessed:	Direct Implications:
Corporate Parenting/Looked After Children	None
Safeguarding responsibilities for vulnerable children and adults	None

Environmental sustainability	<p>The ETCI project has links to the following Council strategies and plans:</p> <ul style="list-style-type: none"> • Surrey Health and Well Being Strategy 2020 • Climate Change Strategy 2020 • Surrey Local Transport Plan 2022
Compliance against net-zero emissions target and future climate compatibility/resilience	<p>Whilst it is a legal requirement to reduce the nitrous oxide emissions in any area experiencing exceedances above the air quality threshold, the scheme also contributes to the Council's target to be net-zero carbon by 2050 through its transport policy and development, as set out in the Greener Futures Climate Change Plan and new Surrey Transport Plan. This includes decarbonisation through the electrification of fleet and complementing the programme of installing charge points.</p>
Public Health	<p>Reduced emissions and better air quality will directly improve public health outcomes for residents.</p>

What Happens Next:

36. It is expected the ETCI scheme will be developed and implemented over the next 2 years, with a further year for monitoring and evaluation. Scheme details will be announced with a joint press release by National Highways and the Council(s). Further information will be provided via the County Council's website.

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Annexes:

Annex 1 – Statement of Future Intent

Sources/background papers:

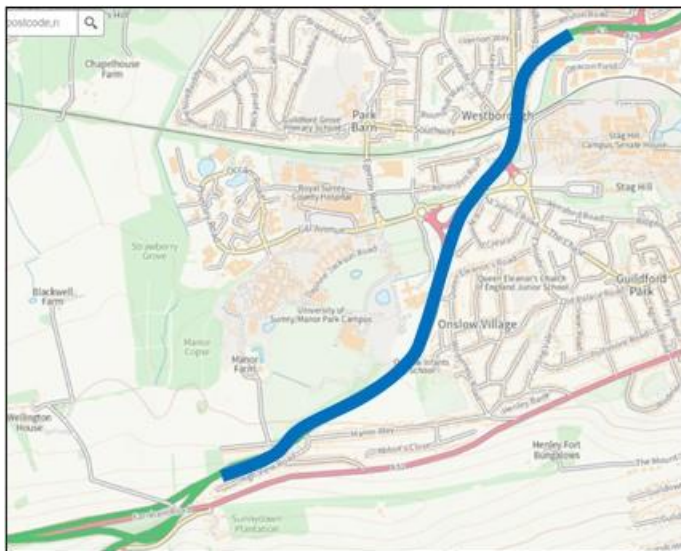
None

National Highways and Surrey County Council: Beyond The Electric Towns and Cities Initiative – Statement of Future Intent

The Government has a legal obligation to meet nitrogen dioxide (NO₂) limit values in the shortest possible time to reduce harmful pollution and improve public health. As part of this obligation National Highways (NH) are required to identify suitable measures to improve NO₂ levels on sections of their Strategic Road Network (SRN) that are above legal limits.

Figure 1 identifies a section of the A3 in Guildford that has the highest level of NO₂ on an identified road link on the SRN. This section of the A3 through Guildford has an annual mean measurement of nitrogen dioxide concentrations of 89µgm³ whereas the legal limit is 40µgm³. This is more than double the legal limit of NO₂.

Priority Area for Action: Figure 1



Without any intervention, it is modelled that legal compliance of NO₂ on the A3 in Guildford will likely be achieved by 2036/37, achieved through fleet turnover to newer, less polluting vehicles.

Current Project

The Electric Towns and Cities Initiative (ETCI) is a project being delivered as a partnership between National Highways, Surrey County Council and Guildford Borough Council. The aim of any measure is to support the delivery of Government's National Air Quality Plan to deliver limit value compliance for nitrogen dioxide (NO₂) concentrations in the shortest timescales possible. The stretch of the A3 running through Guildford has been identified as a priority area for action, having a mean annual NO₂ level of more than double the legal limit.

£11million has been provided for this project from NH's Environment and Wellbeing fund. This funding covers the vehicle grants, support for charging infrastructure, as well as employment of a team of 4 people to run the scheme.

The ETCI project aligns with National Highway's Net Zero Strategy, leading to reductions in overall CO₂ emissions. It also has links to the following County Council strategies and plans:

- Surrey Health and Well Being Strategy 2020.
- Climate Change Strategy 2020.
- Surrey Local Transport Plan 2022.

There are three elements to the proposed scheme, namely:

1. Promotion of grants for the conversion of up to a 1,000 diesel vans to an electric alternative for regular users of the A3. This will support local businesses in making the switch to electric from more polluting vehicles.
2. Support for charging infrastructure to enable vans to charge during the day to support the success of the overall ETCI project. This will not only support businesses but local residents with electric vehicles.
3. Travel planning for local businesses.

The A3 through Guildford has an annual mean measurement of nitrogen dioxide emissions concentrations of 89µgm³. Delivering the above initiatives, is modelled to deliver a 3µgm³ reduction. Whilst on the face of it this seems a small reduction in roadside NO₂ concentrations, it is comparable with the level of reduction expected to be achieved through other more invasive measures such as tall air quality barriers or urban wide charging clean air zones being introduced by local authorities.

Future Intent

The County Council has a very good working relationship with National Highways, and this is reflected not only in the roll out of the ETCI project, but also the early work to try and find a range of possible measures required to improve air quality alongside the A3 and in the wider region. This culminated in the joint publication of the local Traffic Management Study, which investigated a wide range of existing County Council and Guildford Borough Council policies and their potential to improve air quality.

However, the County Council and National Highways recognise there is more to do to meet this difficult air quality challenge and a broader approach will be necessary to provide the necessary protection our local communities deserve and expect. National Highways will continue to work closely with Surrey County Council, Guildford Borough Council and the Department for Transport to explore a range of measures to further reduce NO₂ exceedances and bring forward compliance in line with the Government's legal duty. This will include consideration of measures that aim to reduce reliance on the private car and the use of the A3 for short local trips that are contributing to existing exceedances along this road.

As part of this commitment, the County Council and National Highways have already entered into dialogue about new initiatives and measures, including potential measures in the local area that provide alternatives to the private car and their use of the A3. Other measures include, but are not restricted to, traffic management, air quality barriers, tunnelling, introduction of speed limits and footway and cycleway improvements. NH is currently conducting a feasibility exercise to look at all these options.

Alongside these measures, National Highways is conducting research into air quality with Birmingham University as well as more innovative solutions such as testing an air filtration system which would complement the Electric Town and Cities Initiative.

The County Council and National Highways will review the potential to extend the former Traffic Management Study, which identified the ETCI project as a potential measure to improve air quality alongside the A3. This Traffic Management Study could then be used as a platform to bring forward further interventions where they can deliver improvements in air quality in reasonable timescales on the A3 corridor.

National Highways and DfT are committed to working closely with the County Council and Guildford Borough Council to tackle the air quality challenge on the A3 and look to bring forward viable and effective solutions. It will be subject to review and appropriate governance structures, likely building on the arrangements already established for the ETCI project.

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SURREY COUNTY COUNCIL**CABINET****DATE: 28 MARCH 2023****REPORT OF CABINET MEMBER: MATT FURNISS, CABINET MEMBER FOR TRANSPORT INFRASTRUCTURE AND GROWTH****LEAD OFFICER: KATIE STEWART, EXECUTIVE DIRECTOR ENVIRONMENT, TRANSPORT AND INFRASTRUCTURE****SUBJECT: FUTURE BUS NETWORK REVIEW AND LOCAL BUS SERVICE INVESTMENT****ORGANISATION STRATEGY PRIORITY AREA: GROWING A SUSTAINABLE ECONOMY SO EVERYONE CAN BENEFIT/ TACKLING HEALTH INEQUALITY/ENABLING A GREENER FUTURE/EMPOWERING COMMUNITIES****Purpose of the Report:**

Local bus services are vital in supporting residents to access essential services, such as employment, education and training, health care and essential food shopping, whilst helping the economy of Surrey to thrive and ensure no one is left behind. Buses are also key to our work in encouraging residents to travel more sustainably, helping to reduce carbon emissions. Increasing sustainable travel alongside the Council's investment in zero emission buses and minibuses will help deliver the carbon reduction targets set out in the Climate Change Delivery Plan. The Council is committed to supporting local bus services and has increased revenue support for service delivery and capital investment to improve their operational effectiveness and efficiency.

However, common with many economic sectors, bus services have been impacted by the Covid pandemic which has resulted in lower levels of patronage and changed travel patterns. In response, the Council has been working hard with the bus industry to build back bus patronage.

In order to be able to access the Covid bus recovery funding, being used to support depressed patronage and revenues, there was a Government requirement for Local Transport Authorities (LTAs) to review bus services in their area to ensure they are financially sustainable once the recovery funding ends. Therefore, in mid-2022 a financial review of all bus services was completed in collaboration with our bus operators. This provided information on bus services that were performing and recovering well, those that were getting close to pre-Covid levels, along with those unlikely to ever return to pre-Covid levels of patronage and financial performance. For the bus services in the latter category, alternative options have been developed, including the potential to withdraw sections of route or whole routes. This review was completed against a backdrop of rising costs (fuel, wages, maintenance, etc) that is pushing up operating costs and contract prices, underlining the need to assess all local bus routes and plan for change across the whole bus network in preparation for Government recovery funding ending.

In considering the need to adapt and change certain services, our planned investment to grow patronage and our plans to expand Digital Demand Responsive Transport (DDRT), we

have completed a comprehensive consultation exercise that enabled residents and stakeholders to have their say on the following:

- Investment in infrastructure;
- Maintaining or changing bus services to better reflect use;
- More Digital Demand Responsive Transport services.

This report sets out the process and outcome of the consultation, with more than 2,600 responses received, which has been used to shape the recommendations and way forward, including a refresh of our Bus Service Improvement Plan (BSIP) to be completed in May 2023.

Recommendations:

It is recommended that Cabinet:

1. Note the response to the public and stakeholder consultation.
2. Agree the proposed changes to the public bus network as set out in **Annex B**, with service changes to be implemented at the start of the new academic year in September 2023.
3. Agree the recommended priority areas for capital investment to support bus services and help grow bus patronage.
4. Agree the recommended areas for expansion of new Digital Demand Responsive Transport services in 2023 as set out in **Annex C**.
5. Agree the process and timescales for updating the Bus Service Improvement Plan and Enhanced Partnership Scheme and agree that the approval and submission of the Bus Service Improvement Plan to Government be delegated to the Director of Highways and Transport in consultation with the Cabinet Member for Transport, Infrastructure and Growth.
6. Agree that the decision to award contracts for local bus services and Digital Demand Responsive Transport services is delegated to the Director, Highways and Transport, in consultation with the Cabinet Member for Transport, Infrastructure and Growth, and the Council's Section 151 Officer.

Reason for Recommendations:

The public consultation has helped shape the bus service changes proposed in **Annex B**. These changes are necessary to ensure the network is financially sustainable and has responded to changed travel patterns, particularly in areas where passenger numbers are unlikely to ever recover to pre-pandemic levels. The financial review of bus services also meets the Department for Transport's (DfT) requirement for accessing the extension of Covid bus recovery funding. The Council is committed to supporting local bus services and has increased revenue support for service delivery and capital investment to improve their operational effectiveness and efficiency.

The public consultation has also helped shape our proposed investment in bus infrastructure. It demonstrated that resident support for investment in buses is high, showing that people value bus services and that targeting investment will aid patronage growth.

The Council's previous BSIP, published in 2021, set out a desire to expand our DDRT offer, learning from the successful Mole Valley Connect scheme funded from the DfT's Rural Mobility Fund. This report sets out proposals for new DDRT schemes shaped by consultation feedback, including the need to promote new schemes and the flexibility they offer residents.

All LTAs are required to review their BSIPs annually. The DfT agreed that the Council's BSIP refresh could be undertaken once the public consultation was complete, enabling the views and suggestions of residents and stakeholders to be included in the BSIP review. This report sets out the BSIP refresh process, with a submission to date at the end of May 2023.

Following the Future Bus Network Review and the consideration of consultation responses, coupled with ongoing dialogue with bus operators, the Council needs to tender the services proposed for change, along with retender of a number of contracts that were extended during the pandemic. New contracts will be awarded following a procurement process in line with the requirements of the Public Contracts Regulations 2015 and the Council's Procurement and Contracts Standing Orders.

Executive Summary:

Background

1. On 25 October 2022 Cabinet agreed that a public and stakeholder consultation on proposals for a future financially sustainable bus network that will be fit for the future and more responsive to transformed travel patterns following the Covid19 pandemic be undertaken. In summary the consultation asked residents and stakeholder for their views on:
 - a. Investment in bus services and supporting infrastructure where we can demonstrably grow bus patronage;
 - b. Reshaping and right sizing other bus services to better reflect reduced and forecast levels of patronage;
 - c. Accelerating the introduction of more Digital Demand Responsive Transport (DDRT) to offer a more innovative, flexible and improved public transport offer to residents.
2. The consultation ran from 3 November 2022 and closed on 6 January 2023. Residents were able to respond via an online survey or a hard copy survey, with several qualitative sessions held with key groups to get further insight and to help shape our decision making. We also targeted younger people to try and elicit their views using various social media channels.
3. This report sets out the process and outcome of the consultation, with more than 2,600 responses received. It has been used to shape the recommendations and way forward and will help with a refresh of our Bus Service Improvement Plan (BSIP) to be completed in May 2023. This report details the responses to the consultation and how it has shaped the proposals being presented to Cabinet for agreement. The full consultation analysis is attached at **Annex A**.

Public and Stakeholder Consultation Summary

4. The consultation approach was outlined and approved by Cabinet on 25 October 2022. It ran from Thursday 3 November 2022 until Friday 6 January 2023.
5. Members in areas affected by proposals were written to advising them of the consultation. There was also an all-Member briefing on the Future Bus Network Review held in advance of the go-live on 3 October 2022.
6. The consultation saw a good response from the public and stakeholders. The consultation analysis in **Annex A** gives full details of what activity happened, which

saw nearly 2,600 survey responses, 115 emails, 1 letter and 1 petition sent in response.

7. Along with survey material, there was a concerted effort to engage via social media. Facebook, Twitter and Instagram posts reached 15,000 residents, with Nextdoor social media posts reaching over 260,000 residents.
8. Social media was specifically targeted at people aged 13-24 who have been historically underrepresented in consultations on transport. Three spot polls on Instagram, again, saw a good reach with nearly 12,000 young people taking part.
9. In regard to the petition, this was sent to the consultation email address. However, it was not lodged as a formal petition on the Council's website. The petition was entitled 'Save Our Bus 17', with 363 signatures of support. As the petition was submitted without a lead petitioner the Council has no clear way of knowing whether the signatories to the petition had given consent to share their personal information. Therefore, we must treat this response as a letter with 363 signatures of support, rather than as a formal petition and for this reason, the petition is not appended to this report.
10. Feedback on investment options, as mentioned later in the report, saw strong support. Where changes were proposed for bus services, this saw opposition from people who currently use the services or see the services as important for others.
11. The consultation responses on the proposed expansion of DDRT were more mixed. It is thought this is because many people do not currently use Demand Response Transport or Community Transport or, potentially, they did not know that this type of transport offer exists. On this basis, more targeted local engagement will take place in areas where new DDRT services are proposed to boost awareness and understanding of what these services are, how they operate, how they are different from a timetabled bus and what they can offer the community in terms of an alternative transport offer.
12. The Communities, Environment and Highways Select Committee received a report on the consultation, proposals and recommendations on 20 March 2023. Feedback from the Select Committee will be presented to Cabinet at their meeting on 28 March for their consideration and review.
13. The consultation was also considered at the first meeting of the Enhanced Partnership (EP) Stakeholder Reference Group (SRG), held on 21 December 2022. Along with highlighting the consultation, some issues raised at the SRG were common to those seen in the consultation response. Further work with the SRG to help shape proposals for improving bus services is ongoing through the EP.

Changes to Local Bus Services

14. In the consultation, and in response to financial pressure on the bus industry, residents were presented with proposals to reduce or potentially remove 24 bus services. Whilst these account for less than 1% of all trips made on buses in Surrey, the consultation response highlighted the importance of these services to those people who currently use them.

15. **Annex B** shows the individual proposals set out in the consultation and alongside each one what is now being presented for agreement by Cabinet as Recommendation 2. In most instances, services were proposed for reduction rather than withdrawal. The potential to overlap or replace these services with new DDRT is also included.

Investment in Bus Infrastructure

16. The consultation demonstrated there is a high degree of support for investment in bus infrastructure to improve services. Over 70% of respondents stated they agreed or strongly agreed with the proposals for investment. Over 60% of respondents stated this would make them use buses more frequently.
17. It should be noted that many respondents did not suggest new bus priority infrastructure in their local area, rather that generally, there should be more and more frequent bus routes than currently offered. Most suggestions for new or extended bus timetables were focused on more rural parts of the county. It is likely that people responding from more rural areas and those asking for more investment were also responding to the proposals on service reductions in those same areas.
18. However, whilst the National Bus Strategy (Bus Back Better) asks LTAs to aspire to have more and more frequent bus services, investing in more rural areas is not considered the best use of targeted capital spend, which should be used to maximise patronage growth. Government has a stated focus of using capital investment where passenger growth is most likely to be delivered and sustained in the long term.
19. Other comments from residents and stakeholders included wanting a focus on providing more Real Time Passenger Information (RTPI) in more locations and improving information accessibility to aid resident decision making.
20. Another suggestion was to make more information available online for people to use prior to and during their journey. Bus data is already 'open source' available via the Bus Open Data Service (BODS) system. This means timetables and route maps are already available on many websites and mobile apps. Google Maps, Traveline, UK Bus Checker and others all have travel search options, timetables, routes and live bus information. This sits alongside some bus operators having their own mobile apps making travel information, and in some cases ticketing, available to bus users. The Council will seek to enhance our current RTPI system whilst highlighting and promoting the commercial options that already exist, for example, via the Council's website.
21. Given the need to deliver against the aspirations of the National Bus Strategy and our BSIP, the priority areas for further investment to support passenger growth agreement were reaffirmed during the consultation. They are as follows:
- a. East Surrey Bus Priority Programme with a focus on Redhill and Reigate
 - b. Guildford and Woking (including surrounding environment) Bus Priority Programme
 - c. Blackwater Valley Bus Priority Programme
 - d. Wider Elmbridge Bus Priority Programme
 - e. North-West Surrey Bus Priority Programme, including Access to Heathrow

Expanding Digital Demand Responsive Transport

22. The Council's BSIP included an aspiration to build on the Mole Valley Connect DDRT scheme implemented following a successful Rural Mobility Fund bid to Government. DfT feedback on the BSIP suggested we provide a better definition of future DDRT schemes. The Council has listened to this advice and used the experience of the Mole Valley Connect service and other community transport schemes to plan future DDRT projects. This has been supported by a consultancy study looking at potential new DDRT areas and operating model options.
23. **Annex C** summarises the DDRT proposals for introduction in September 2023 and potentially beyond, subject to performance and required funding. The 2023 proposals will be tendered to the commercial market, with bidders strongly encouraged to bid to operate multiple DDRT schemes where practical, rather than have a multiplicity of providers. The proposals cover some of the most rural areas of Surrey, including where there is no current public transport offer. There are four new DDRT schemes, plus two DDRT enhancements proposed for 2023, offering a more flexible transport option than any timetabled bus service that may be available. **Annex C** also sets out the plan for further DDRT schemes over the coming years, where more work is required to develop these schemes to a point where they can be shaped ready to tender and funding secured for their delivery. It is proposed to move toward a blended mix of provision with traditional commercial and contracted local bus services, alongside an increased number of DDRT services, thus offering a more flexible transport solution to all residents, with DDRT focussing on the more rural parts of the county. The further expansion of DDRT beyond September 2023 will be subject to future Cabinet consideration and decision.
24. The contract value of the existing local bus services to be incorporated into the new DDRT services planned for September 2023 will help fund the exciting new DDRT schemes. However, additional funding is required as, subject to tender prices, DDRT will be available to residents 7am to 7pm Monday to Saturday, whereas the existing services offer one or two return shopper's journeys on a couple of days a week. Subject to tender prices being received, it is forecast that additional funding of circa £700,000 pa will be required for the proposed 2023 DDRT expansion.
25. DDRT services will be available to a far wider community than the existing shopper's services. DDRT will offer many more residents enhanced travel opportunities and provide an alternative to the private car. Although the estimated additional cost could be perceived as high, DDRT will create the opportunity for more residents to use bus services and to travel more sustainably, helping to reduce carbon emissions and deliver the carbon reduction targets set out in the Climate Change Delivery Plan.
26. The performance of the proposed new DDRT services as set out in Annex C will be closely monitored and a review will take place after 12 months of operation to establish the benefits and impacts.

20 and Under Half Fare Concessionary Travel Scheme

27. The National Bus Strategy highlights the need for LTAs and bus operators to consider fares and ticketing measures to address cost as a barrier to bus use. In responding to this challenge, the Council has developed an exciting new scheme to support all residents aged 20 and under by offering a half fare on buses across Surrey. This will support children and young people by reducing transport costs, thus

helping them access school, college and their first job more affordably, whilst also enhancing independence. It will encourage residents aged 20 and under to use the bus more often and for longer in life. It also aims to reduce the need for the purchase of a first car and consequential emissions.

28. The 20 & Under Half Fare Concessionary Travel Scheme (20HFCTS) will operate via a smartcard that will be available to Surrey residents aged five to 20. The smartcard will include photo identification to help prevent fraudulent use. Smartcards will provide key data to identify patterns of use i.e., when and where passes are being used, helping the Council to develop and enhance the scheme overtime.
29. The 20HFCTS will replace the current Student Fare Card offer. The latter scheme gives those in full time education a discounted fare on their travel to and from school or college. The new 20HFCTS covers ages five to 20 inclusive and is a more generous offer as it can be used at any time and not restricted to trips for education.
30. The 20HFCTS smartcard will be issued free to qualifying residents, whereas the Student Fare Card costs £25 per year. Issuing a free 20HFCTS smartcard will maximise take up of the scheme by younger residents as it removes the initial cost barrier to entry. This will create a projected additional annual cost in the range £201,000 to £375,000, subject to actual uptake of the scheme, the implications of which are set out in the financial and value for money implications section of this report.
31. The cost of administering the 20HFCTS, including the reimbursement to bus operators for revenue foregone, will be met by the Council through existing Environment, Transport and Infrastructure budgets.
32. The 20HFCTS was planned to launch at the beginning of April, coinciding with the end of the DfT's national £2 flat fare scheme. However, on 17 February the DfT announced an extension of their scheme to the end of June 2023. Whilst this extension is welcome, it requires the Council to consider the optimum time to launch the new 20HFCTS offer. Careful consideration is required as not all bus operators opted to participate in the DfT's £2 flat fare scheme. To determine the best way forward, the Council consulted local bus operators to obtain their views on when best to launch the new 20HFCTS. Discussions included launching 20HFCTS in April as planned with all bus operators or just those not participating in the £2 flat fare scheme or deferring a countywide launch until June coinciding with the new end date of the £2 flat fare scheme.
33. After careful consideration, a decision has been taken to launch the new 20HFCTS at the end of June 2023. This will target the Council's investment at all residents aged 20 and under once the £2 flat fare scheme ends. This decision will enable a greater level of publicity and promotion to be put in place in readiness for the launch. It will also ensure countywide coverage for the 20HFCTS, avoid potential confusion between competing offers and ensure the scheme lands right first time.
34. The EP Board is scheduled to consider and agree the detail of the 20HFCTS in April, noting the scheme is set to run initially for three years.

Bus Service Improvement Plan Refresh

35. The National Bus Strategy requires LTAs to review and, where necessary, update their BSIPs annually. BSIPs should be published by the end of October each year and submitted to Government for review. However, the Council agreed with the DfT that it would not rush to review its BSIP for October 2022 given the planned Future Bus Network Review consultation. Nationally, the DfT's request that LTAs complete a financial review of bus service sustainability in their area was in part to manage the end of the Covid bus recovery funding. It aimed to stop LTAs from simply cutting bus services when Government recovery funding ceased. The Council's own review has provided time to work on priority areas for investment and DDRT expansion, whilst using the findings from the consultation to support our planned BSIP refresh.
36. The BSIP refresh also needs to recognise the Council has thus far been unsuccessful in securing Government BSIP funding. In addition, it needs to reflect that Local Transport Plan 4 (LTP4) is now adopted policy, which will assist in creating a sustainable transport network, with buses core to achieving that ambition.
37. The consultation and planned review of the EP Scheme highlights a number of new initiatives that can be included, with others to be merged or amended. **Table 1** below sets out the activities and indicative timescales to develop a revised BSIP and new EP Scheme.

Table 1 – Developing a Revised BSIP and New EP Scheme

Activity	Key Dates
Enhanced Partnership Stakeholder Reference Group Meeting	21 December 2022
Future Bus Network Consultation - concludes	6 January 2023
Enhanced Partnership Board Meeting	17 January 2023
Recommendations report to Cabinet on the Future Bus Network review	28 March 2023
BSIP review	March to May 2023
Enhanced Partnership Board 'Special Meeting' – consideration of 20 and Under Half Fare Concessionary Travel Scheme	April 2023
BSIP (revised) submitted to DfT	End of May 2023
Enhanced Partnership Scheme updated	May 2023
Enhanced Partnership Stakeholder Reference Group Meeting	May 2023
Enhanced Partnership Scheme statutory consultation	June 2023
Enhanced Partnership Board Meeting	End of June 2023
New Enhanced Partnership Scheme adopted	July 2023

Risk Management and Implications:

38. The Council has been acutely aware of the financial risks of reduced bus patronage and depressed income as a result of the Covid pandemic and changed travel patterns over the last couple of years. The impacts apply to both the Council's local bus contracts and to services that are run commercially. Allied to this is the recognition that the DfT bus recovery funding used to support bus services would cease, which now has a new end date of June 2023.
39. A critical risk for all LTAs and bus operators over the last twelve months has been rising cost pressures. This is causing industry-wide problems with the cost of fuel,

competition for drivers with other industries, and the increased cost of materials for maintenance. This is happening at the same time as travel patterns have changed and patronage recovery to pre-pandemic levels is slower than we might like on some services and in some areas. Patronage on some bus routes may never fully recover.

40. In addition, the DfT has intimated that a long-awaited consultation will be held on the future of Bus Service Operator Grant (BSOG), formally Fuel Duty Rebate. BSOG is essentially a rebate on fuel duty paid and is allocated to LTAs for contracted services and direct to operators for commercial services. The value of BSOG to the Council is £1.125m per annum, a figure set for many years based on a DfT formula. Whilst the details of the future DfT consultation are awaited, it is highly likely that the outcome will be LTAs receiving far less BSOG, or potentially none at all in future.
41. The Future Bus Network Review was proactive in recognising all these risks and funding pressures. The Council's proposals described in this report provide the basis for a financially sustainable plan for future service delivery. The Council's approach fully recognises the DfT's request to ensure bus networks are financially sustainable once recovery funding ends. This all serves to highlight why the Council completed the Future Bus Network Review and is taking action to right-size the network for the future.
42. Taking no action would likely have resulted in commercial bus service de-registrations and Council contracts being handed back as being financially unsustainable. By working with the bus industry through the Future Bus Network Review we have maximised outcomes and minimised risk for residents and the Council.
43. Whilst the proposed tender exercise will determine the costs of reprocurring routes, early and ongoing engagement with providers aims to stimulate a positive response from the commercial market.
44. The Council's EP approach has also had a positive impact. It enables the Council to influence more effectively all bus services, including the commercial services which dominate in terms of overall passenger numbers, noting that pre-pandemic, three in every four bus passenger journeys were undertaken on commercially operated bus services. That said, with no Government funding award to date, the ability to deliver against the aspirations of the Council's BSIP are more limited, although the Council aims to bid for BSIP funding if and when future opportunities are announced. Through the BSIP refresh a review of targets to allow for a more reasonable level of patronage growth taking account of the absence of Government funding will be completed. The BSIP refresh will also take account of the public and stakeholder consultation responses, helping to shape the exploration of new initiatives.

Financial and Value for Money Implications:

45. The Council's BSIP aspirations still presents a significant opportunity for investment in a wide range of initiatives to improve public transport, including more zero emission buses, bus priority measures, a higher quality passenger waiting environment, better passenger information and service enhancements. Packaged together, all of these will help build patronage back to pre-covid levels and beyond. This will be the basis of our future bids for BSIP funding to the DfT, driven through the EP.

46. The Council has already agreed to invest significant sums of its own to improve the public transport offer to residents, working in partnership with the bus industry. This includes a £49m investment to support our Climate Change Delivery Plan objectives through an investment in more zero emission buses and minibuses, more RTP1 and more bus improvement and priority measures. Outside of BSIP funding, this investment is unparalleled in any other English LTA. It serves to demonstrate the Council's unwavering commitment to improving public transport, thus supporting the modal hierarchy approach set out within our recently adopted LTP4.
47. Existing budgets have meant that the Council has been able to maintain the current bus network whilst we consulted with residents and stakeholders, using the outputs to help shape decisions. This has ensured that changes can be carefully planned and effectively introduced in preparation for the start of the new academic year in September 2023. The comprehensive public and stakeholder consultation meant the Council was transparent and engaged in a meaningful way. Securing the views and opinions of residents and stakeholders has shaped proposed changes to local bus services, future capital investment plans and new DDRT schemes. It clearly demonstrates that we gave residents and stakeholders the opportunity to have their say and we have listened.
48. As noted above, the Council recognised some time ago that there would be pressures on the local bus network likely requiring additional financial support given changing travel patterns, alongside a mixed and still developing pattern of patronage recovery post Covid. This is a national issue. The Council's foresight and action taken to provide additional local bus funding has secured network stability, enabling residents to continue to travel by bus to access key services.
49. The outcome of local bus and DDRT tendering in the Spring, the future volume of concessionary journeys (and thus operator reimbursement for revenue foregone) and the actual take up and use of the 20HFCTS are all uncertain due to future inflation, cost pressures, patterns of travel behaviour, bus patronage recovery trends, etc. However, the Council is committed to funding and delivering the proposed local bus changes and contract retendering planned for 2023/24 as set out in this report, alongside the infrastructure investment that will support the operation of local bus services and grow patronage, which received large support in the public and stakeholder consultation. The Council is also committed to funding and delivering the new and expanded DDRT services for 2023/24 as set out in **Annex C**. Finally the Council is committed to introducing the 20HFCTS with no smartcard/pass application fee. A free pass will remove a potential financial barrier to young people and their families, maximising the opportunity for young people to use bus services right across Surrey.
50. Overall, subject to tender prices being received, the budget is forecast as sufficient to fund the planned changes and improvements in 2023/24, noting that some changes will be a part year effect. The budget includes some available funding that is 'one off', noting that Covid bus recovery grant has been extended until the end of June 2023. Further analysis will be required once tendering is complete to fully assess the financial implication for 2024/25 and onward, however, the changes recommended in this report are expected to lead to higher costs in future years, which may require changes to the Council's transport budget. The potential for additional DDRT beyond

that planned for 2023/24 and the implementation of other initiatives, for example, those contained in the Council's BSIP, will be subject to future reports and decisions.

Section 151 Officer Commentary:

51. Although significant progress has been made to improve the Council's financial position, the financial environment remains challenging. The UK is experiencing the highest levels of inflation for decades, putting significant pressure on the cost of delivering our services. Coupled with continued increasing demand and fixed Government funding this requires an increased focus on financial management to ensure we can continue to deliver services within available funding. In addition to these immediate challenges, the medium term financial outlook beyond 2022/23 remains uncertain. With no clarity on central government funding in the medium term, our working assumption is that financial resources will continue to be constrained, as they have been for the majority of the past decade. This places an onus on the Council to continue to consider issues of financial sustainability as a priority in order to ensure stable provision of services in the medium term.
52. The Council's Medium Term Financial Strategy includes provision for the investment in bus infrastructure set out in this report, and makes allowance for the estimated financial impact of changes in costs and bus usage. In addition to this, the recommendations include a number of other enhancements to bus services which are likely to have ongoing financial implications for the Council. As set out in the report the exact cost of these services is currently unclear, being subject to a competitive procurement process at a time when wider market costs and future bus usage remain uncertain. It is likely that the introduction of new measures such as DDRT and the 20HFCTS scheme will require longer term changes to the Council's transport budget. This will become clearer once services have been tendered for, and once the Council understands the take up of newly introduced measures. The Council will need to consider the impact on future transport budgets alongside its other priorities as it reviews its Medium Term Financial Strategy.

Legal Implications – Monitoring Officer:

53. The Bus Services Act 2017 introduced new models of partnership working into the Transport Act 2000.
54. The Government's National Bus Strategy introduced a requirement to adopt such partnership working.
55. Cabinet in October 2022 agreed the Enhanced Partnership Plan for Surrey, inclusive of proposed governance arrangements to start on 3 November 2022.
56. LTAs and operators were required by Government to jointly produce a local BSIP to help deliver the National Bus Strategy.
57. The DfT published guidance to local authorities and bus operators in May 2021. The guidance provides that BSIPs should be regularly reviewed to ensure they remain relevant and that the plans within it are working as intended.

Equalities and Diversity:

58. As part of developing the proposals an Equality Impact Assessment was drafted. This has been updated following the end of the consultation process. The full EIA can be found as **Annex D** to this report.
59. The EIA process has highlighted both positive and negative impacts. Feedback to the consultation specifically highlighted negative impacts for those people facing reduced or withdrawn bus services. Positive impacts will mainly be focused in those areas prioritised for investment.
60. There are mitigating options for people to change travel habits to deal with changing timetables, either by using alternative bus routes that may be in the area or demand responsive or community transport. However, feedback also highlighted how these may prove to be an inappropriate mitigation to losing or having a bus service reduced. This negative impact will be most keenly felt based on peoples' age and whether they have a disability.
61. Some school children, their parents and carers may face having to find alternative travel for trips where school services are removed as part of wider changes to the bus services in the consultation.
62. People with mobility issues may be less able to get to an alternative bus stop, where alternative routes are available. It was also raised that people with learning difficulties and/or autism, particularly if they have received Independent Travel Training, will be less able to amend their travel habits to deal with changes to or withdrawing bus services.
63. This may be mitigated, for some people who have received Independent Travel Training, with further support and training to use a DDRT service to make their journeys. This is being explored with officers in Children, Families and Life Long Learning to help identify people who may benefit and then provide support and training prior to DDRT being introduced. However, it is recognised that this may not be suitable for everyone affected.
64. Whilst negative impacts were most commonly raised in relation to DDRT proposals, there is some support for expanding DDRT. Having these services can provide more flexible transport across a wider area. For example, some bus services may only run during specific times, or on certain days of the week. New DDRT services would likely operate similar to the Mole Valley Connect Service that offers travel between 7 a.m. and 7 p.m. Monday to Saturday. However, as mentioned previously, a new DDRT service may not be suitable for everyone.
65. As well as assessing impacts on people with Protected Characteristics, a report looking at some of the areas covered by proposals and where they score on the Indices of Multiple Deprivation has been completed. This is **Annex E** to this report. The findings of this report have been considered in developing the final proposals for change as set out in **Annex B** and **Annex C**.
66. The report, **Annex E**, highlighted where changes to local transport may impact residents in the following wards:

- Hooley, Merstham and Netherne,
- Stoke (Guildford),
- Tattenham Court and Preston,
- Court (Epsom and Ewell),
- Redhill West and Wray Common,
- Horley Central and South and
- Ash Wharf

67. In most instances the proposals highlight reducing bus services rather than withdrawal, but this is not the case in all the areas. The desk-based report, alongside the EIA, highlights where disabled people and those on low incomes, may be more impacted by proposed changes. Some of the impact can be mitigated, to some degree, through the introduction of DRT as a more flexible transport alternative.

68. As part of the ongoing work of the Enhanced Partnership, there will be continuing engagement with stakeholders, including continued work focussed through the EP Stakeholder Reference Group and with specific stakeholder groups covering disability, learning difficulties and autism. As well as these groups, officers will use the Youth Councils in Surrey to engage with younger people, who are often underrepresented in engagement on transport despite efforts to target them as a 'hard to reach' group.

Other Implications:

69. The BSIP looks to make improvements across all aspects of bus and demand responsive transport. Making investment in priority areas will support passenger confidence and lead to patronage growth. Public transport is also an enabler of economic growth and sustainability aspirations.

Area assessed:	Direct Implications:
Corporate Parenting/Looked After Children	Any looked after children will have access to the 20 and Under Half Fare Concessionary Travel Scheme, providing discounted travel where cost may be a barrier to using public transport.
Safeguarding responsibilities for vulnerable children and adults	As mentioned in the EIA, there will be impacts on people maintaining independence where bus routes are changed or withdrawn. Also, mitigations may not be available or usable by everyone who previously used the timetable bus service.
Environmental sustainability	Reducing transport emissions is a key aspect to ensure sustainable transport options and help the county meet its net-zero targets.
Compliance against net-zero emissions target and future climate compatibility/resilience	A Passenger Transport study in 2017 showed that modern diesel buses produced lower Oxides of Nitrogen emissions than modern diesel cars. Alongside a roll out of new zero emission buses and minibuses, plus investment in bus priority measures we can create a virtuous cycle for bus use and encourage more people to use public transport for more of their journeys.
Public Health	Where locations have an air quality issue, and in conjunction with other measures, reducing

	transport emissions will help mitigate health issues.
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What Happens Next:

70. Following the decision made by Cabinet:

- a. The tendering exercise for local bus contracts will start, with contract awards planned for May/June 2023
- b. The tendering exercise for DDRT services will start, with contract awards planned for May/June 2023
- c. The BSIP and Enhanced Partnership Scheme will be updated as set out on Table 1 of this report
- d. Targeted resident and bus user engagement will take place in areas where new DDRT is to be introduced
- e. Information on changes to bus services will be communicated to Members and residents during June to September
- f. Changes to bus services and new DDRT services will start from 1 September 2023

Report Author:

Keith McKain, Programme Manager National Bus Strategy.

Paul Millin, Assistant Director, Strategic Transport, 07968 832 573

Consulted:

All Surrey County Councillors

All Borough and District Councils

Parish and Town Councils

Disability groups, specifically: the Disability Empowerment Networks and the Disability Empowerment Networks Chairs, the Surrey Coalition of Disabled People, ATLAS Surrey and the Surrey Vision Access Group

Surrey transport user groups

Surrey residents

Annexes:

ANNEX A - Consultation Feedback Analysis

ANNEX B - Changes to Bus Services Summary

ANNEX C - Expansion of DDRT Summary

ANNEX D - Equality Impact Assessment

ANNEX E - Report on Areas Affected and Indices of Multiple Deprivation

Sources/background papers:

Bus Back Better – An Enhanced Partnership for Surrey, 25 October 2022

National Bus Strategy: Enhanced Partnership for Surrey – Cabinet Member Report, 26 April 2022.

National Bus Strategy: A Bus Service Improvement Plan for Surrey – Cabinet Report, 26 October 2021.

Bus Back Better: National Bus Strategy for England – published by the Department for Transport, 15 March 2021.

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Future Bus Network Review - Consultation Feedback Analysis

Summary report

January 2023

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1 Introduction

A public consultation on proposed changes to Surrey's future bus network was launched on Thursday 3 November 2022 and concluded on Friday 6 January 2023. This was to obtain the views of the public and stakeholders on the following proposals:

- Bus route and supporting infrastructure investment,
- Maintaining or changing bus services where relevant to increase patronage or better reflect existing patronage, and
- Expanding the number of Digital Demand Responsive Transport (DDRT) for a more flexible transport offer to residents

Consultation material was available on buses, at the larger bus stations, at libraries, and at council offices. Community Liaison Officers (CLOs) were briefed on the consultation to enable them to further raise awareness with Surrey residents. Material was sent to stakeholders, including all district, borough, town, and parish councils to advertise the consultation.

Further communications activities are summarised as follows:

- Press release issued
- Interview on BBC Surrey Radio
- Facebook, Twitter, and Instagram social media posts throughout the consultation period which reached 15,000 residents
- Nextdoor social media post which reached 262,117 residents
- Targeted Instagram polls which reached an additional 11,992 young people (discussed in further detail below)
- Article in Surrey Matters which was read by 80,563 residents
- Editorial sent to Surrey Charity Forum, Surrey Minority Ethnic Forum, and 65 Town and Parish councils for newsletters
- Surrey County Council (SCC) homepage story which generated 119 click throughs to the survey page
- Adverts in Surrey Mirror and Surrey Advertiser newspapers which reached 30,096 residents
- Posters displayed at 300 bus stops
- Scrolling messages ran on all Surrey TFT display screens
- 10,700 hard-copy surveys and 2,170 posters/flyers distributed to bus operators, SCC offices, libraries, GP surgeries, District & Borough council offices, community centres, and Parish council offices
- Communications toolkit issued to all District & Borough communications teams for cascade
- Communications toolkit issued to all SCC Members for cascade to local channels

We ran three snap polls on Instagram during the consultation, targeting young people aged 13-24 as part of a broader effort to try to engage young people.

The first poll asked young residents whether they would like to see more on demand electric minibuses (DDRT) rather than timetabled buses; 48 per cent answered that they would like to see more DDRT, and 52 per cent answered that they would not.

The second poll asked whether bus improvements would encourage them to use bus services more; 73 per cent of respondents answered yes, and 27 per cent answered no.

The final poll asked young residents whether they had used bus services in Surrey in the past 12 months; 64 per cent said that they had, and 36 per cent had not.

2,595 surveys were completed, including 230 hard copy surveys. 115 emails, 1 letter, and 1 petition were also received. The petition was titled Save Our Bus 17 and concerning the potential withdrawal of the 17 service. It had 363 signatures.

In regard to the petition, this was sent to the consultation email address. However, it was not lodged as a formal petition on the Council's website. The petition was entitled 'Save Our Bus 17', with 363 signatures of support. As the petition was submitted without a lead petitioner the Council has no clear way of knowing whether the signatories to the petition had given consent to share their personal information. Therefore we must treat this response as a letter with 363 signatures of support, rather than as a formal petition.

88 per cent of survey respondents said that they had used bus services in the past 12 months and 12 per cent had not. 45 per cent of respondents said that they held a concessionary bus pass; 40 per cent held an older person's pass and 5 per cent held a disabled person's pass.

In addition, the project team attended meetings with the Disability Empowerment Networks (DENs), the DENs Chairs, the Surrey Vision Action Group, and the Surrey Coalition of Disabled People. The team also engaged with young people through targeted social media polls and offers to attend youth community groups including ATLAS and the newly formed Runnymede Youth Council (although this meeting was cancelled by the youth council).

2 Resident feedback summary

This section summarises some of the key findings from the consultation responses.

When asked about the areas where we have proposed to prioritise investment, 70 per cent of survey respondents indicated that they agreed or strongly agreed. Respondents were further asked whether improvements in the proposed areas would encourage them to use bus services more, 62 per cent of respondents agreed or strongly agreed that they would be encouraged to use bus services more.

When asked about the areas where we have proposed to introduce DDRT, most respondents did not indicate a strong opinion either way (48 per cent of respondents answered 'neutral' and 16 per cent did not the answer the question). A further 16 per cent indicated that they disagree or strongly disagree with our DDRT proposals; these respondents were concentrated around the following five postcode areas. In two of the areas with the greatest negative response (GU6 and GU2), the positive response still outweighed the negative.

	Postcode area	Disagree	Agree
RH7	Lingfield, Dormansland, Crowhurst	2.68%	0.91%
GU6	Cranleigh, Ewhurst, Alfold	1.40%	1.52%
GU2	Guildford	1.52%	1.89%
GU7	Godalming/Farncombe	1.89%	1.03%
GU8	Waverley	1.46%	0.79%

However, a significant response was received to indicate support for improving the transport offer in rural villages. When respondents were asked if there were any other areas in Surrey that they wanted to see investment in bus services, 4 per cent of respondents highlighted the need to invest in rural villages. Significantly, this was an open-ended question and rural villages received the fifth highest proportion of responses. This indicates public support for an improved rural transport offer, which our DDRT proposals will support in areas like Waverley.

Respondents were also given the opportunity to respond to specific bus routes, for example, where we proposed changes in frequency of the service. Two routes in particular, the 65 (Guildford-Farnham-Bentley-Froyle-Alton), and the 281 (Crawley-Cophthorne-East Grinstead-Lingfield) received significant negative response.

The proposal to reduce the 65 from an hourly to two-hourly service received 226 responses, 85 per cent of which were opposed. The proposal to withdraw the 281 from Lingfield and Dormansland (but maintain the existing school journeys to and from Crawley) received 195 responses, 90 per cent of which were opposed. This is similarly reflected in the qualitative feedback which is covered in section 4 of this document.

When asked how their travel would change if the specific route proposal were to go ahead, most respondents overall said they would drive (27 per cent), not travel at all (30 per cent), or take the bus (16 per cent). For routes 65 and 281, 35 per cent and 32 per cent respectively of respondents said they would not travel at all.

Demographic analysis is covered on pages 19 and 20.

The full consultation analysis can be found in section 3 of this document.

3 Stakeholder feedback summary

Formal stakeholder responses were received from 20 stakeholders. This group consists of borough, district, town, and parish councils, organisations representing older persons, disabled persons, and young people with learning disabilities, as well as transport, health, and community groups.

In addition, the project team attended meetings with the Disability Empowerment Networks (DENs), the DENs Chairs, the Surrey Vision Action Group, and the Surrey Coalition of Disabled People

A full list of formal stakeholder responses is provided below:

Ashford & St Peter's Hospital	Lingfield Parish Council
Bletchingly Parish Council	North West Surrey Bus User Group
Dormansland Parish Council	Oaklands Park Residents' Association
East Surrey Green Party	Oaklands Park retirement estate
East Surrey Transport Committee	Reigate & Banstead Borough Council
Egham Residents' Association	RHS Wisley
Godalming Cllrs representing Central & Ockford, Milford & Witley, Godalming South (joint response)	Salfords & Sidlow Parish Council
Godalming Town Council	Surrey Coalition of Disabled People
Guildford & Waverley Borough Councils (joint response)	Waverley Borough Council
Hambledon Parish Council	Witley Parish Council

The main findings are summarised are as follows:

- 15 stakeholders stated that they were opposed to the proposed changes to individual bus services; of these responses, 12 provided comment on specific proposals. The most responses were received for routes 32, 100, and 409.
- A further 3 stakeholders provided comments in support of the consultation's proposals, and 2 stakeholders stated that they were neutral toward the proposals.
- Stakeholders who were broadly opposed to the consultation's proposals stated that it was too soon to assess the change needed to adapt to post-COVID service levels. Comments suggested allowing more time for passenger levels to settle into a 'new normal', and that making changes now would adversely affect communities that are still recovering from lockdowns and adapting to the effects of hybrid working patterns. It was further suggested that the proposals are not in line with the national Bus Back Better Strategy, as it does not provide improved services in the evenings/weekends or propose sufficient demand responsive services for underserved rural areas.
- 9 stakeholders raised concerns that the proposed changes would further isolate rural communities, for example Dormansland and Hambledon. Comments suggested that the proposed changes would negatively impact school journeys, employment opportunities, GP and hospital access. It was suggested that those on lower incomes, young people, those with disabilities, and elderly people would be most adversely impacted.
- 5 stakeholders provided comments around the potential for adverse impact on elderly or disabled residents. Stakeholders raised concern both around the isolation of communities with a high proportion of elderly residents and the accessibility of DDRT for elderly and disabled residents. 2 stakeholders provided comment specifically about the Oaklands Park area which contains a large retirement community. It was suggested that

the elderly residents were highly dependent on the existing service and would find it very difficult were the proposed changes to go ahead. Further, stakeholders raised concerns over whether DDRT was user-friendly and reliable enough for disabled and elderly residents.

- Several stakeholders gave their support for investment proposals in real time passenger information displays and underscored the importance of these and a React System for residents with audio and/or visual impairments.

4 Qualitative analysis

Survey respondents were given two opportunities to provide open-ended comment; they were asked whether there were any other areas of Surrey where they would like to see investment prioritised, and whether there were any other areas of Surrey where they would like to see DDRT implemented. Email correspondence and letters are covered in section 4.3 of this document.

4.1 Investment in other areas of Surrey

1704 of 2595 survey respondents provided comment when asked whether there were any other areas of Surrey where they would like to see investment prioritised.

Though this question was focused on bus priority measures, most responses focus on introducing new bus routes, reinstating historic routes or extending current routes. These were categorised into areas and specific routes, the top 10 of which are in the below table. 93 responses were tagged as 'Other', where respondents chose to provide broader comment on Surrey bus services. These are covered in more detail below.

CATEGORY	COUNT
Dormansland/Lingfield	97
Other	93
North Surrey	86
Farnham/Godalming/Haslemere	76
Cranleigh	71
Rural villages	65
Epsom	60
Hersham/Walton-on-Thames/Molesey	57
Dorking	56
Farnham	47

Of the responses categorised as 'Other', there were 3 key themes:

- Timetabling: buses do not arrive on time or are frequently cancelled, investment in real time passenger information displays is needed
- Extend services: requests across routes and areas to have routes extended in the evenings and on weekends
- Cost: Surrey buses are too expensive and subsidised bus fares would increase passenger rates

4.2 Digital Demand Responsive Transport (DDRT) in other areas of Surrey

756 of 2595 survey respondents provided comment when asked whether there were any other areas of Surrey where they would like to see DDRT implemented. These were tagged into areas and specific routes, the top 10 of which are in the below table.

23 responses were tagged as 'Opposed', where respondents were opposed to the proposed DDRT services in general, largely due to the perception that it would isolate rural communities. 52 responses were tagged as 'Other', where respondents chose to provide broader comment on Surrey bus services. These are covered below.

CATEGORY	COUNT
Other	52
281/Lingfield/Dormansland	40
Hospital links	34

Farnham	32
Epsom	27
Dorking	27
Hersham/Walton-on-Thames/Molesey	25
Opposed	23
Woking	21
Guildford	20

Of the responses tagged 'Other', there were 2 key themes:

- Cost effectiveness: respondents suggested that a conversion to DDRT services costs more than maintaining existing routes in most areas
- Isolates vulnerable groups: respondents largely held the perception that anyone without digital access/competency would be excluded from accessing DDRT services

4.3 Email and written correspondence

The consultation received 155 emails and 1 letter from the public.

Of these 156 responses:

- 35 opposed the proposed changes to the 281 service in Dormansland and Lingfield
- 11 opposed the proposed changes to the 409 service in Tandridge
- 8 opposed the proposed changes to the 65 service in Farnham and Alton
- 12 gave comments unrelated to the consultation

Other key themes are highlighted below.

CATEGORY	COUNT
Hospital journeys	29
School journeys	36
Impact on older persons	26
Impact on disabled persons	13

4.4 Social media poll responses

We ran three snap polls on Instagram during the consultation, targeting young people aged 13-24 as part of a broader effort to try to engage young people. We received 5,059 responses across three poll questions; the full results are listed below.

Q. Would you like to see more on demand, door to door electric minibuses which you can book when you need them, rather than timetabled buses?

RESPONSE	TOTAL	PERCENT
Yes	371	47.69%
No	407	52.31%
Total	778	

Q. Would bus improvements in your area encourage you to use them more?

RESPONSE	TOTAL	PERCENT
Yes	1258	73.14%
No	462	26.86%

Total	1720	
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Q. Have you used bus services in Surrey in the past 12 months?

RESPONSE	TOTAL	PERCENT
Yes	1649	64.39%
No	912	35.61%
Total	2561	

4.5 Responses by question

The full results of the survey are listed in detail below.

Q. Consider the following proposals. Do you think these are the right things to invest in?

We are investing over £50 million to improve bus services and supporting infrastructure across Surrey which supports our Greener Futures agenda. The aim of this investment is to grow bus patronage and improve our environment by:

- Increasing the number of zero emission buses,
- Helping buses to arrive on time through more bus priority measures such as bus lanes, bus gates, and clearways, and
- Expanding our Real Time Passenger Information displays and improving information available online

RESPONSE	TOTAL	PERCENT
Strongly agree	1473	56.76%
Agree	816	31.45%
Neutral	167	6.44%
Disagree	66	2.54%
Strongly disagree	40	1.54%
Not answered	33	1.27%

Q. Consider the following proposals. Do you agree with the areas we would like to invest in?

- The east of Surrey, focusing on Reigate, Redhill, and access to Gatwick Airport
- Guildford and Woking, including the surrounding areas where routes start or terminate at the town centres
- The Blackwater Valley, including access to Frimley Park Hospital
- The wider Elmbridge area, including links into and out of London, as well as Sunbury, West Byfleet, Weybridge, and Chertsey

RESPONSE	TOTAL	PERCENT
Strongly agree	1057	40.73%
Agree	768	29.60%
Neutral	437	16.84%
Disagree	211	8.13%

Strongly disagree	96	3.70%
Not answered	26	1.00%

Q. Do you think improvements in these locations will encourage you to use bus services more?

RESPONSE	TOTAL	PERCENT
Yes	1608	61.97%
No	607	23.39%
Don't know	344	13.26%
Not answered	36	1.39%

Q. Is there another area of Surrey where you would like to see investment in buses?

This is covered in section 4.1 of this document.

Q: Do you agree with our overall approach to maintaining and changing services?

Based on the current level of patronage, the increased cost needed to operate bus services in future, and where individual bus services fit into the overall bus network, we have set out proposals for:

- Keeping most services as they are,
- Investing in infrastructure to support and prioritise bus services such as bus lanes, bus gates, and clearways,
- Changing some services to reduce their frequency, daily operating hours, or days of operation, and
- Transforming some services into Digital Demand Responsive Transport services

RESPONSE	TOTAL	PERCENT
Strongly agree	343	13.22%
Agree	1044	40.23%
Neutral	567	21.85%
Disagree	402	15.49%
Strongly disagree	173	6.67%
Not answered	66	2.54%

Q: Do you agree with the changes we propose to individual routes?

Service	Route	Days of operation	September 2023 proposals
3	Guildford-Bellfields	Daily	Reduce frequency from operating every 20 minutes to every 30 minutes.
17	Guildford-Fairlands (circular)	Mon-Sat	Combine service 17 with shoppers service 520 (operates three days a week on Tuesdays, Wednesdays, and Fridays) OR convert services 17 and 520 to DDRT.
22	Crawley-Gatwick-Horley-Charlwood-Leigh-Chart Downs-Dorking-Holmbury St Mary	Mon-Fri	Start first morning journey from Dorking to Crawley in Charlwood.
32	Guildford-Dorking-Redhill	Mon-Sat	The two journeys that currently divert via Holmbury St Mary and Abinger Common would be rerouted to

			operate along the A25. Reduce journeys operating via Emlyn Road in Earslwood from five to three.
41	Ash-Ash Vale- North Camp- Farnborough Park- Farnborough- Frimley Park Hospital	Mon-Fri	This is a Hampshire County Council contracted bus service that extends into Surrey which is also under review. Consideration to be given to introduce DDRT to areas in Surrey without alternative transport options.
42	Guildford- Godalming- Cranleigh	Mon-Sat	Withdraw from Catteshall Lane Godalming, Ifold and Loxwood; considering maintaining Godalming College journeys and converting the rest of the service to DDRT.
65	Guildford- Farnham- Bentley-Froyle- Alton	Mon-Sat	Reduce current hourly service to operate every two hours.
100	Crawley-Horley- Redhill	Daily	Reduce overnight service (from 00:45 to 03:15) and maintain existing frequencies with the intention to return frequencies to the pre-Covid levels when demand increases.
281	Crawley- Cophorne-East Grinstead- Lingfield	Mon-Sat	Withdraw from Lingfield and Dormansland (operate between Crawley to Stone Quarry only) but maintain the existing school journeys to and from Crawley.
409	Lingfield- Caterham- Whyteleafe- Warlingham	Sunday	Withdraw 409 Sunday service and include Sundays in the existing Tandridge Demand Responsive Transport service.
457	St Peters Hospital- Addlestone-New Haw-Rowtown- Ottershaw-St Peters Hospital	Mon-Fri	Integrate with 592/593 services.
520	Aldershot- Tongham-Ash- Normandy- Woking/Guildford	Tue/Wed/Fri	Combine with service 17 OR convert services 520 and 17 to DDRT.
545	Walliswood- Forest Green- Holmbury St Mary- Blackheath- Guildford	Wednesday	Withdraw from Holmbury St Mary and Sutton Abinger OR convert to DDRT.
592	Addlestone- Rowtown-New Haw-Woodham- Kettlewell Hill- Woking Station- Morrisons	Thur/Fri/Sat	Combine service 592 and 593 routes to operate 5 or 6 days a week. Withdraw extension to Brooklands.
593	Ottershaw-Lyne- Chertsey-Penton Park-Staines	Mon/Wed/Fri	See service 592 above
599	Holmbury St Mary-Forest Green-Ewhurst- Cranleigh-	Thur/Fri	Withdraw from Holmbury St Mary and Sutton Abinger OR convert to DDRT.

	Smithwood Common- Wonersh- Guildford		
715	Guildford-Burnt Common-Ripley- Cobham-Esher- Thames Ditton- Kingston	Daily	Withdraw 6.29am journey from Cobham to Guildford and reduce evening service to finish at 8pm instead of 9.20pm.
430/435	Merstham- Redhill-Reigate	Daily	Reduce Sunday frequency from hourly to every 90 minutes.
70/71/72	Guildford- Peasmarsh- Farncombe- Godalming- Milford-Witley- Brook- Haslemere- Fernhurst- Midhurst	Daily	Withdraw the following journeys: 5.49am from Chiddingfold to Guildford, 6.08am Haslemere to Midhurst, 8.25pm Guildford to Shottermill, and 9.26pm Shottermill to Godalming.
E9/E10	E9 Epsom- Longmede- Clarendon Park and E10 Epsom- Manor Park- Noble Park	Daily	Reduce Monday to Saturday service after 7pm from hourly to operate every two hours.

15

ROUTE	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
3	6%	18%	17%	23%	36%
17	13%	19%	15%	29%	24%
22	7 %	26%	16%	25%	26%
32	5%	21%	16%	22%	36%

41	11%	15%	25%	26%	23%
42	4%	12%	10%	35%	39%
65	3%	7%	6%	28%	57%
100	14%	42%	10%	16%	18%
281	4%	4%	3%	14%	76%
409	4%	14%	9%	23%	50%
457	14%	24%	23%	21%	18%
520	10%	18%	19%	32%	21%
545	5%	5%	10%	24%	57%
592	15%	19%	27%	23%	15%
593	6%	26%	26%	31%	11%
599	10%	5%	13%	33%	40%
715	3%	19%	18%	36%	23%
430/435	2%	13%	14%	28%	43%
70/71/72	8%	15%	18%	29%	31%
E9/E10	0%	11%	20%	35%	35%

Q: If the services change as proposed, how would you make this journey?

ROUTE	Bus	Car sharing scheme	Cycle	Drive	Get a lift	Other	Taxi	Train	Walk	Would not travel
3	36%	0%	0%	1%	20%	1%	10%	9%	3%	20%
17	17%	0%	0%	4%	29%	4%	7%	6%	1%	7%
22	16%	0%	0%	4%	26%	3%	10%	6%	3%	4%
32	54%	1%	0%	10%	56%	11%	7%	19%	9%	29%
41	21%	0%	1%	3%	16%	0%	3%	7%	1%	1%
42	27%	0%	1%	9%	67%	16%	20%	9%	7%	16%
65	37%	0%	3%	6%	86%	10%	19%	4%	39%	11%
100	64%	0%	1%	9%	19%	9%	10%	10%	7%	11%
281	20%	1%	1%	9%	67%	17%	36%	16%	13%	11%
409	11%	0%	0%	3%	57%	9%	10%	11%	3%	11%
457	23%	0%	1%	3%	27%	9%	10%	6%	1%	1%
520	17%	0%	1%	9%	27%	3%	7%	4%	4%	7%
545	0%	0%	3%	3%	6%	0%	1%	4%	0%	0%
592	27%	0%	0%	6%	16%	0%	7%	4%	0%	3%

593	16%	0%	1%	7%	3%	4%	4%	3%	1%	4%
599	3%	0%	0%	7%	14%	0%	7%	1%	1%	11%
715	34%	0%	1%	11%	37%	10%	11%	16%	16%	11%
430/435	31%	1%	0%	7%	46%	10%	13%	21%	4%	21%
70/71/72	33%	0%	1%	4%	70%	13%	9%	10%	16%	17%
E9/E10	4%	0%	0%	1%	33%	6%	4%	13%	3%	7%
PERCENT OF OVERALL	22%	0%	1%	5%	33%	6%	9%	8%	6%	15%

181 respondents answered 'Other' and were asked to provide more detail of how their travel would change if the individual route proposals were to go ahead. These comments were largely focused on expressing disagreement with individual route proposals, concern over maintaining school journeys, or suggesting that the proposals would leave them unable to travel.

Q. Do you agree with the areas and routes proposed for transition to DDRT?

Service	Route	Days of operation	September 2023 proposals
17	Guildford-Fairlands (circular)	Mon-Sat	Combine service 17 with shoppers service 520 (operates three days a week on Tuesdays, Wednesdays, and Fridays) OR convert to DDRT.
41	Ash-Ash Vale-North Camp-Farnborough Park-Farnborough-Frimley Park Hospital	Mon-Fri	This is a Hampshire County Council contracted bus service that extends into Surrey which is also under review. Consideration to be given to introduce DDRT to areas in Surrey without alternative transport options.
42	Guildford-Godalming-Cranleigh	Mon-Sat	Withdraw from Catteshall Lane Godalming, Ifold and Loxwood; considering maintaining Godalming College journeys and converting the rest of the service to DDRT.
409	Lingfield-Caterham-Whyteleafe-Warlingham	Sunday	Withdraw 409 Sunday service and include Sundays in the existing Tandridge Demand Responsive Transport service.
503	Lane End, Hambledon, Hydestile, Godalming, Farncombe, Bramley, Womersley, Chilworth, Shalford, and Guildford	Mon/Wed/Fri	Convert to DDRT.
504	Clovelly Rd, Hindhead, Lion Lane, Shottermill,	Tues/Thurs	Convert to DDRT.

	Hammer Hill, Sickle Hill Estate, and Haslemere		
505	Northchapel, Fisher Street, Gospel Green, Haslemere, and Shottermill	Tues/Thurs	Convert to DDRT.
520	Aldershot, Ash Road, Tongham, Ash Green, Shawfields, Ash, Normandy, Fairlands, Royal Surrey Hospital, Park Barn, and Guildford	Tues/Wed/Fri	Convert to DDRT.
523	Guildford, Farncombe, Godalming, Busbridge, and Milford Hospital	Tues/Thurs	Convert to DDRT.
525	Albury-Chilworth- Cranleigh	Thursday	Convert to DDRT.
533	Ewhurst-Ockley- Dorking-Ranmore	Tuesday	Convert to DDRT.
538	Stoughton, Bellfields, Slyfield Green, Jacobs Well, and Burpham Sainsbury's	Tues/Fri	Convert to DDRT.
545	Walliswood-Forest Green-Holmbury St Mary- Blackheath- Guildford	Wednesday	Withdraw from Holmbury St Mary and Sutton Abinger OR convert to DDRT.
599	Holmbury St Mary- Forest Green- Ewhurst- Cranleigh- Smithwood Common- Wonersh-Guildford	Thur/Fri	Withdraw from Holmbury St Mary and Sutton Abinger OR convert to DDRT.
DRT	Tandridge area Demand	Mon-Fri	Enhance existing Demand Responsive Transport service (DRT) to Digital Demand Responsive Transport.

	Responsive Transport		
Hoppa	Waverley & Farnham Demand Responsive Transport	Mon-Fri	Enhance existing Demand Responsive Transport service (DRT) to Digital Demand Responsive Transport.

RESPONSE	TOTAL	PERCENT
Strongly agree	152	5.86%
Agree	385	14.84%
Neutral	1242	47.86%
Disagree	211	8.13%
Strongly disagree	203	7.82%
Not answered	402	15.49%

15

Q. Is there another location in Surrey where you would like to see DDRT in the future?

This is covered in section 4.2 of this document.

Q. Have you used bus services in Surrey in the past 12 months?

RESPONSE	TOTAL	PERCENT
Yes	2296	88.48%
No	298	11.48%
Not answered	1	0.04%

Q. Which statement(s) best describe why you don't use buses in Surrey?

Respondents who answered that they had not used bus services in Surrey in the past 12 months were then asked two further questions about their specific bus usage.

RESPONSE	TOTAL	PERCENT
Don't run frequently enough	171	19.81%
Bus doesn't go where I want it to	113	13.09%
Cannot rely on the bus running to time	112	12.98%
Too expensive	83	9.62%
Prefer other modes of transport (driving, cycling, walking, etc)	70	8.11%
Journey times too long	61	7.07%
No evening service	59	6.84%
No bus service where I live	48	5.56%
No buses early enough in the morning	40	4.63%
Other	39	4.52%
Availability of fare information in advance of travel	36	4.17%
No Sunday service	31	3.59%

Q. What would encourage you to start using the bus?

RESPONSE	TOTAL	PERCENT
More frequent services	167	16.00%
A more reliable timetable	122	11.69%
Cheaper fares	105	10.06%
Real time information	87	8.33%

Smart ticketing (e.g., an Oyster card-style system)	81	7.76%
Quicker journey times	77	7.38%
More information about available bus services, times, and fares	68	6.51%
More evening services	67	6.42%
Other	48	4.60%
More early morning services	46	4.41%
Bus stop improvements (new shelters, improved accessibility)	46	4.41%
Better information on fares in advance of travel	40	3.83%
More Sunday services	33	3.16%
On board audible and visual next stop announcements	20	1.92%
Improved customer service (e.g., better disability awareness training for drivers)	13	1.25%
None of these	13	1.25%
Free Wi-Fi on the bus	11	1.05%

Q. What is the number of the bus route that you use most?

Respondents who answered that they had not used bus services in Surrey in the past 12 months were then asked five further questions about their specific bus usage.

2201 total responses were received to this question. This table displays the top 20 routes for the sake of clarity, so only 54 per cent of responses to this question are displayed below. A further 249 respondents listed two or more routes which could not be grouped together in line with the below.

ROUTE	TOTAL	PERCENT
281	112	9.51%
70/71/72	106	9.00%
34/35	101	8.57%
53/63	85	7.22%
32	78	6.62%
430/435	72	6.11%
65	66	5.60%
1	64	5.43%
461	57	4.84%
91	45	3.82%
4/5	42	3.57%
2	42	3.57%
100	41	3.48%
42	40	3.40%
420/460	40	3.40%

409	40	3.40%
479	39	3.31%
410	39	3.31%
458	35	2.97%
3	34	2.89%

Q. How frequently do you use this service?

RESPONSE	TOTAL	PERCENT
6-7 days per week	252	9.71%
3-5 days per week	671	25.86%
1-2 days per week	655	25.24%
Less than 1 day per week	693	26.71%
Not answered	324	12.49%

Q. What time(s) of the day do you use this service?

RESPONSE	Total	Percent
Before 9:30am	756	29.13%
9:30am-3pm	1697	65.39%
3pm-6pm	1122	43.24%
6pm-8:30pm	614	23.66%
8:30pm-1am	267	10.29%
Not answered	327	12.60%

Q. What are your main reason(s) for using this service?

Option	Total	Percent
Travelling to/from shops to do essential shopping	1180	45.47%
Leisure/recreational activities	952	36.69%
Attending medical appointments (hospital, doctor, dentist)	926	35.68%
Travelling to/from shops to do non-essential shopping	879	33.87%
Visiting friends or relatives	639	24.62%
Travelling to/from work	580	22.35%
Not answered	329	12.68%
Travelling to/from school, college, or university	233	8.98%
Other	165	6.36%
Visiting care/community centres	122	4.70%

Q. How important is this bus service to you?

RESPONSE	TOTAL	PERCENT
Very important	1693	65.24%
Important	480	18.50%
Neutral	75	2.89%
Not very important	26	1.00%
Not at all important	4	0.15%
Not answered	317	12.22%

Q. Do you hold a disabled or older person's concessionary (free) bus pass?

RESPONSE	Total	Percent
Yes, I have a disabled person's bus pass	116	4.47%
Yes, I have an older person's bus pass	1048	40.39%
No, I do not have a concessionary bus pass	1099	42.35%
Not answered	332	12.79%

4.6 Equalities monitoring data

Ethnicity

Option	Total	Percent
White - British, English, Northern Irish, Scottish or Welsh	2050	79.00%
White - Irish	30	1.16%
White - Gypsy or Irish Traveller	2	0.08%
Any other White background	119	4.59%
White and Black Caribbean	6	0.23%
White and Black African	5	0.19%
White and Asian	11	0.42%
Any other mixed or multiple ethnic background	16	0.62%
Asian or Asian British - Indian	26	1.00%
Asian or Asian British - Pakistani	6	0.23%
Asian or Asian British - Bangladeshi	0	0.00%
Asian or Asian British - Chinese	14	0.54%
Any other Asian background	13	0.50%
Black or Black British - Caribbean	4	0.15%
Black or Black British - African	7	0.27%
Any other Black British, Caribbean or African background	1	0.04%
Arab	0	0.00%
Other ethnic group	8	0.31%
Prefer not to say	155	5.97%

A further 21 respondents chose 'Other'. These responses stated in large part that they did not wish to provide this information.

Sex

Option	Total	Percent
Male	1011	38.96%
Female	1316	50.71%
Prefer not to say	168	6.47%
Not answered	100	3.85%

Gender identity

Option	Total	Percent
Yes	2270	87.48%
No	13	0.50%
Prefer not to say	177	6.82%
Not answered	135	5.20%

Disability or long-standing health condition

Option	Total	Percent
No	1517	58.46%
Deaf or hard of hearing	141	5.43%
Vision impairment	87	3.35%
Physical health condition	326	12.56%
Mental health condition	126	4.86%
Neurological condition (e.g., learning disability, autism)	90	3.47%
Limited mobility	282	10.87%
Prefer not to say	183	7.05%
Not answered	197	7.59%

Age

Option	Total	Percent
Under 18	88	3.39%
18-24	103	3.97%
25-34	146	5.63%
35-44	270	10.40%
45-54	337	12.99%
55-64	347	13.37%
65-74	750	28.90%
75-84	412	15.88%
85+	52	2.00%
Not answered	90	3.47%

Care responsibilities for others

Option	Total	Percent
Yes	646	24.89%
No	1682	64.82%
Prefer not to say	157	6.05%
Not Answered	110	4.24%

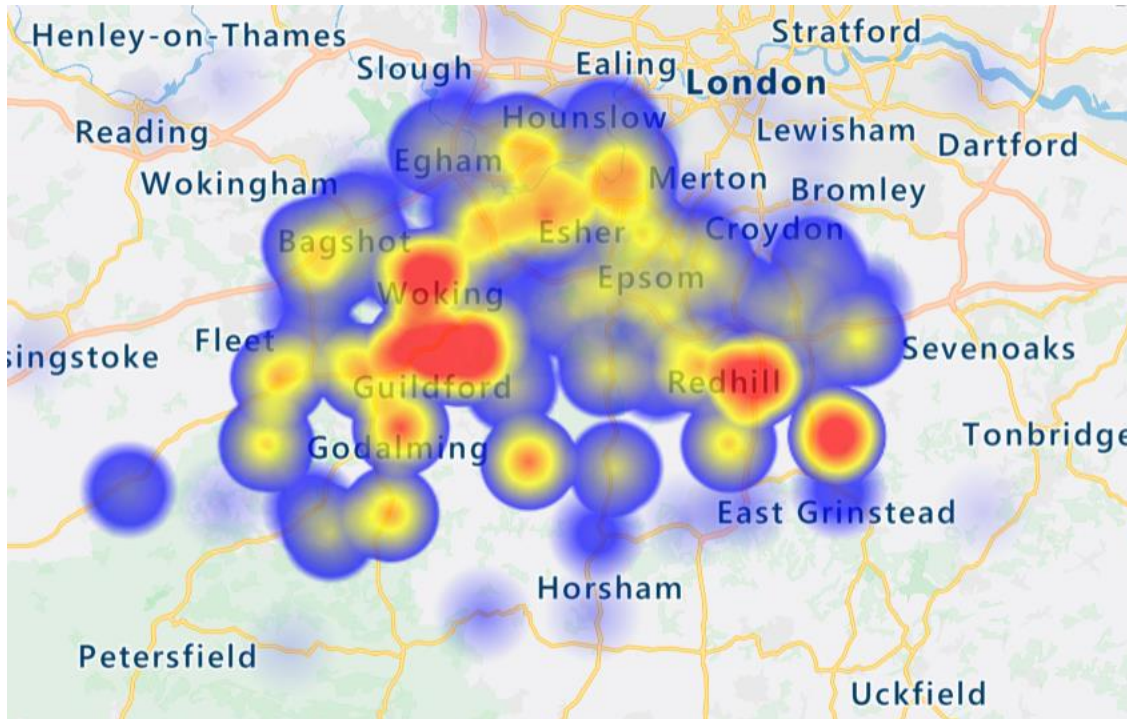
Employment status

Option	Total	Percent
Full-time employment (30 hours or more per week)	674	25.97%
Part-time employment (less than 30 hours per week)	277	10.67%
Self-employed (full time or part time)	93	3.58%
Voluntary employment	68	2.62%
Not employed	54	2.08%
In full-time education (school, college, or university)	123	4.74%
In part-time education (school, college, or university)	9	0.35%
Homemaker	35	1.35%
Not required to work due to a disability or illness	49	1.89%

Retired	1124	43.31%
Not Answered	89	3.43%

5 Postcode Breakdown

The response is broken down first in a heatmap of where respondents live, then a summary table of responses by District/Borough, and then by postcode area.



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District/Borough	Count	Percent
Elmbridge Borough Council	161	6.40%
Epsom & Ewell Borough Council	82	3.26%
Guildford Borough Council	515	20.48%
Mole Valley District Council	95	3.78%
Reigate & Banstead Borough Council	282	11.21%

Runnymede Borough Council	76	3.02%
Spelthorne Borough Council	117	4.65%
Surrey Heath Borough Council	110	4.37%
Tandridge District Council	302	12.01%
Waverley Borough Council	364	14.47%
Woking Borough Council	184	7.32%

Postcode	Count	Postcode area
GU21	91	Woking, Bisley, Brookwood, Chobham, Weybridge, Horsell, Knaphill, Sheerwater
RH1	136	Redhill, Merstham, Nutfield, Bletchingley, Salfords, South Nutfield, Whitebushes, Outwood
RH7	131	Dormansland, South Godstone, Lingfield, Felbridge, Newchapel, Felcourt, Crowhurst
GU2	129	Guildford
GU1	118	Guildford
GU7	87	Godalming, Shalford, Eashing, Hurtmore
GU6	79	Cranleigh, Ewhurst, Alfold, Alfold Crossways, Ewhurst Green,
GU4	72	Guildford, Woking, Shalford, West Clandon, Chilworth, Albury, West Horsley, East Clandon, Sutton Green, Jacobs Well, Blackheath
GU3	68	Guildford, Normandy, Compton, Woking, Pirbright, Worplesdon, Puttenham, Fairlands, Wood Street Village, Wanborough, Artington
GU8	66	Chiddingfold, Milford, Elstead, Dunsfold, Witley, Plaistow and Ifold, Shackleford, Hydestile, Hambledon, Hambledon, Pitch Place, Thursley, Bowlhead Green, Enton, Loxhill, Busbridge, Wormley, Sandhills, Brook, Peper Harow, Highstreet Green, Enton Green, Hascombe
KT12	66	Walton-on-Thames, Hersham, Weybridge, West Molesey, Molesey
GU9	64	Farnham, Badshot Lea
RH2	60	Reigate, Reigate Heath, Sidlow, Buckland, Irons Bottom, Leigh
RH6	56	Burstow, Charlwood, Horley, Crawley, Horne, Lowfield Heath, Norwood Hill, Hookwood, Tinsley Green, Shipley Bridge, Smallfield

GU10	54	Farnham, Churt, Frensham, Tilford, Tongham, Crondall, Wrecclesham, Rowledge, Ewshot, Runfold, Bucks Horn Oak, Dippenhall, Spreakley, Shortfield Common, Batt's Corner, Bentley, Charleshill, The Sands, Millbridge, Headley, Holt Pound, Rushmoor, Surrey, Dockenfield, Seale
GU22	53	Woking, West Byfleet, Brookwood, Pyrford, Send, Mayford, Ripley
KT19	47	Epsom, Ewell
RH8	44	Oxted, Limpsfield, Crowhurst Lane End, Tandridge, Titsey, Chart
RH4	39	Dorking, Brockham, Wotton, Westcott
KT1	38	Kingston upon Thames, Molesey, Hampton Wick, Molesey
GU15	37	Camberley
TW16	37	Sunbury-on-Thames, Feltham, Walton-on-Thames, Hampton, London
KT15	36	Addlestone, Woking, Weybridge, Chertsey, Ottershaw
RH5	36	Capel, Ockley, Okewood, Walliswood, Forest Green, Newdigate
GU16	35	Aldershot, Deepcut, Lightwater, Frimley
KT20	35	Epsom, Banstead, Tadworth, Walton-on-the-Hill, Buckland, Pebble Coombe, Lower Kingswood, Box Hill, Mogador, The Hermitage
CR3	33	Woldingham, Woldingham Garden Village, Caterham, Whyteleafe, Kenley, Chaldon
GU5	32	Shere, Bramley, Gomshall, Shalford, Peaslake, Albury, Shamley Green, Womersley, Farley Green, Stroud Common, Thorncombe Street, Palmers Cross, Grafham, Burrows Cross
SM7	32	Banstead
TW15	31	Ashford, Weybridge
GU27	29	Haslemere, Chiddingfold, Fernhurst, Easebourne, Grayswood, Linchmere, Kingsley Green, Henley, Easebourne
KT22	28	Cobham, Oxshott, Fetcham, Leatherhead, Fetcham, Ashted, Great Bookham
GU12	26	Aldershot, Ash Vale, Tongham, Ash, Normandy
TW20	26	Egham, Englefield Green, Staines, Chertsey, Thorpe
KT8	25	Molesey

TW17	25	Shepperton, Upper Halliford, Littleton, Spelthorne, Lower Halliford
KT23	23	Little Bookham, Great Bookham, Effingham
KT13	22	Weybridge, Addlestone
KT10	21	Esher, Claygate, Oxshott
CR5	20	Coulsdon, Chipstead, Banstead, Old Coulsdon, Hooley, Mugswell
CR6	20	Warlingham, Farleigh, Hamsey Green, Chelsham
RH3	20	Brockham, Betchworth, Buckland
GU18	18	Lightwater
KT14	18	West Byfleet, Byfleet, Woking, Weybridge
KT17	18	Epsom, Ewell, Banstead, Sutton
RH9	18	Godstone, South Godstone
TW18	18	Staines-upon-Thames, Hythe End, Weybridge, Laleham, Stanwell
GU34	17	Guildford, Haslemere, Godalming
KT7	17	Thames Ditton, Molesey, Esher, Long Ditton, Molesey
GU24	16	Woking, Chobham, Bisley, Pirbright, Brookwood, Donkey Town, Surrey, West End, Normandy, West End
KT6	16	Surbiton, Tolworth, London
KT18	15	Headley, Epsom, Leatherhead, Ashted, Langley Vale
TW1	14	Twickenham
GU19	12	Bagshot
GU26	12	Hindhead, Grayshott, Beacon Hill, Headley, Bramshott Common
KT11	10	Cobham, Oxshott, Hersham, East Horsley, Great Bookham, Fetcham, Stoke d'Abernon, Downside, Martyr's Green, Ockham
KT16	10	Chertsey, Ottershaw, Addlestone, Chobham, Longcross, Lyne
KT24	9	Shere, East Horsley, Effingham, West Horsley, Ripley
GU20	8	Windlesham, Bagshot, Chobham, Sunningdale, Winkfield Row
KT2	8	Kingston upon Thames, Coombe

KT21	8	Ashtead, Epsom
RH19	8	Brockhurst, Dormans Park, East Grinstead
TN16	8	Tonbridge, Kent
RH12	7	Horsham, Warnham
GU14	6	Farnborough
TW19	6	Wraysbury, Horton, Stanwell, Old Windsor, Slough, London
GU23	5	Guildford, Farnham, Cranleigh, Aldershot, Woking, Haslemere, Camberley
SM2	5	Sutton, Belmont
TW2	5	Twickenham, Isleworth
GU25	4	Virginia Water, Chobham, Lyne, Surrey, Stroude
CR8	3	Croydon, Caterham, Mitcham, Warlingham
RH10	3	Crawley
RH14	3	Billingshurst, Wisborough Green, Ifold, Loxwood, The Haven
CR0	2	Croydon, New Addington, South Croydon, Addington
GU11	2	Guildford, Aldershot, Farnham, Haslemere, Godalming, Woking
GU35	2	Bordon, Lindford, Headley Down
KT4	2	Worcester Park, London
RH11	2	Crawley, Ifield, Southgate, Broadfield
RH13	2	Horsham
CR2	1	Croydon, Caterham, Mitcham, Warlingham
DA8	1	Erith, Dartford, Belvedere
GU21	1	Woking, Knaphill, Horsell, Sheerwater, St John's, Littlewick
GU29	1	Midhurst, Easebourne, Stedham, Bepton, West Lavington, Heyshott
KT5	1	Surbiton, Kingston upon Thames, New Malden, Chessington, Worcester Park
PO22	1	Felpham, Barnham, Middleton-on-Sea, South Bersted, West Barnham
RG1	1	Reading, Earley
RG10	1	Twyford, Waltham St Lawrence, Wargrave, Hurst, Charvil

RG22	1	Basingstoke
RH27	1	Reigate
SE26	1	Upper Sydenham, Lower Sydenham, Bell Green
SL5	1	Broomhall, North Ascot, South Ascot, Sunningdale, Ascot
SM1	1	Sutton, Carshalton
SM3	1	Sutton, Morden
SM5	1	Carshalton, Wallington, Mitcham, Banstead, Coulsdon
SO14	1	Southampton
SW4	1	Clapham Common, Stockwell
TN3	1	Eridge Green, Lamberhurst, Langton Green, Groombridge, Blackham
TW10	1	Richmond, Kingston-upon-Thames
TW11	1	Teddington, Kingston-upon-Thames, Hampton Wick, Hampton Hill, Hampton, Molesey
TW13	1	Feltham, Twickenham, Sunbury-on-Thames
TW14	1	Feltham, Hounslow
UB8	1	Uxbridge, Hayes, West Drayton

Annex B

Changes to Bus Services Summary: Consultation Proposals (September 2023) and FINAL Proposals Post Consultation

Service	Route	Days of Operation	September 2023 Consultation Proposals	Final Proposal Post Consultation
3	Guildford-Bellfields	Daily	Reduce frequency from operating every 20 minutes to every 30 minutes.	This service is commercial, and the operator is revisiting the longer-term viability of maintaining a 20 minute service. A decision is expected by June.
17	Guildford-Fairlands (circular)	Mon-Sat	Combine service 17 with shoppers service 520 (operates three days a week on Tuesdays, Wednesdays, and Fridays) OR convert services 17 and 520 to DDRT.	This service is commercial and the operator has confirmed it is no longer viable. It is proposed that a North Guildford DDRT service will be introduced as an alternative to service 17 and 520.
22	Crawley-Gatwick-Horley-Charlwood-Leigh-Chart Downs-Dorking-Holmbury St Mary	Mon-Fri	Start first morning journey from Dorking to Crawley in Charlwood.	As proposed.
32	Guildford-Dorking-Redhill	Mon-Sat	The two journeys that currently divert via Holmbury St Mary and Abinger Common would be rerouted to operate along the A25. Reduce journeys operating via Emlyn Road in Earslwood from five to three.	This service is commercial. The one journey a day diverted via Holmbury St Mary and Abinger Common would be rerouted to operate along the A25. Viability of journeys operating via Emlyn Road in Earslwood to be reconsidered.
41	Ash-Ash Vale-North Camp-Farnborough Park-Farnborough-Frimley Park Hospital	Mon-Fri	This is a Hampshire County Council contracted bus service that extends into Surrey which is also under review. Consideration to be given to introduce DDRT to areas in Surrey without alternative transport options.	Hampshire CC have withdrawn this contract. In Surrey, Ash Hill Road between Wharf Road & Guildford Road, and Stratford Road in Ash Vale will be unserved, with usage here is extremely low. Residents will still have direct links to Aldershot (on the 3 & Kite), Camberley (3) and Guildford (Kite). Farnborough can be accessed by bus into Aldershot and change on to route 1. The Farnham DDRT service will cover Tongham and therefore provide alternative travel opportunities.
42	Guildford-Godalming-Cranleigh	Mon-Sat	Withdraw from Catteshall Lane Godalming, Ifold and Loxwood, considering maintaining Godalming College journeys and converting the rest of the service to DDRT.	This service is commercial, and the operator is revisiting the longer-term viability of maintaining the service along Catteshall Lane in Godalming. To be withdrawn from Ifold, Loxwood and Plaistow in W.Sussex. No change to Godalming College journeys.
65	Guildford-Farnham-Bentley-Froyle-Alton	Mon-Sat	Reduce current hourly service to operate every two hours.	This service is commercial, and the operator is revisiting the longer term viability of maintaining an hourly service. A decision is expected by June.

Annex B

Service	Route	Days of Operation	September 2023 Consultation Proposals	Final Proposal Post Consultation
100	Crawley-Horley-Redhill	Daily	Reduce overnight service (from 00:45 to 03:15) and maintain existing frequencies with the intention to return frequencies to the pre-Covid levels when demand increases.	This service is commercial, and the operator is revisiting the longer-term viability of maintaining the overnight service. Current 20-minute frequency to be maintained with the intention to build back to the pre Covid frequency when demand increases.
281	Crawley-Copthorne-East Grinstead-Lingfield	Mon-Sat	Withdraw from Lingfield and Dormansland (operate between Crawley to Stone Quarry only) but maintain the existing school journeys to and from Crawley.	This service is commercial, and the operator is revisiting the longer-term viability of maintaining the existing service. School journeys will be maintained either way. A decision is expected by June.
409	Lingfield-Caterham-Whyteleafe-Warlingham	Sunday	Withdraw 409 Sunday service and include Sundays in the existing Tandridge Demand Responsive Transport service.	No change to existing Sunday service.
457	St Peters Hospital-Addlestone-New Haw-Rowtown-Ottershaw-St Peters Hospital	Mon-Fri	Integrate with 592/593 services.	Developer funding has time expired. Usage is very low, requiring this service to be integrated, as far as possible, with service 592/593.
520	Aldershot-Tongham-Ash-Normandy-Woking/Guildford	Tue/Wed/Fri	Combine with service 17 OR convert services 520 and 17 to DDRT.	Alternative travel opportunities will be available through the proposed North Guildford and Farnham DDRT services.
545	Walliswood-Forest Green-Holmbury St Mary-Blackheath-Guildford	Wednesday	Withdraw from Holmbury St Mary and Sutton Abinger OR convert to DDRT.	Withdraw from Holmbury St Mary and Sutton Abinger. This service will be incorporated into the area served by the Mole Valley Connect DDRT service from September 2023.
592	Addlestone-Rowtown-New Haw-Woodham-Kettlewell Hill-Woking Station-Morrisons	Thur/Fri/Sat	Combine service 592 and 593 routes to operate 5 or 6 days a week. Withdraw extension to Brooklands.	Services 592 and 593 will be combined to offer a service 6 days a week and maintain a shopping trip to Brooklands.
593	Ottershaw-Lyne-Chertsey-Penton Park-Staines	Mon/Wed/Fri	See service 592 above	See service 592 above.
599	Holmbury St Mary-Forest Green-Ewhurst-Cranleigh-Smithwood Common-Wonersh-Guildford	Thur/Fri	Withdraw from Holmbury St Mary and Sutton Abinger OR convert to DDRT.	Withdraw from Holmbury St Mary and Sutton Abinger. This service will be incorporated into the area served by the Mole Valley Connect DDRT service from September 2023.
715	Guildford-Burnt Common-Ripley-Cobham-Esher-Thames Ditton-Kingston	Daily	Withdraw 6.29am journey from Cobham to Guildford and reduce evening service to finish at 8pm instead of 9.20pm.	No change proposed.
430/435	Merstham-Redhill-Reigate	Daily	Reduce Sunday frequency from hourly to every 90 minutes.	No change proposed.

Annex B

Service	Route	Days of Operation	September 2023 Consultation Proposals	Final Proposal Post Consultation
70/71/72	Guildford-Peasmarsh-Farncombe-Godalming-Milford-Witley-Brook-Haslemere-Fernhurst-Midhurst	Daily	Withdraw the following journeys: 5.49am from Chiddingfold to Guildford, 6.08am Haslemere to Midhurst, 8.25pm Guildford to Shottermill, and 9.26pm Shottermill to Godalming.	This service is commercial, and the operator is revisiting the longer-term viability of maintaining the early and late journeys. A decision is expected by June.
E9/E10	E9 Epsom-Longmede-Clarendon Park and E10 Epsom-Manor Park-Noble Park	Daily	Reduce Monday to Saturday service after 7pm from hourly to operate every two hours.	No change proposed.

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Annex C

Expansion of Digital Demand Responsive Transport (DDRT) Summary: Consultation Proposals and FINAL Proposals Post Consultation

Service	Route	Days of operation	Consultation Proposals	Final Proposals Post Consultation
17	Guildford-Fairlands (circular)	Mon-Sat	Combine service 17 with shopper's service 520 (operates three days a week on Tuesdays, Wednesdays, and Fridays) OR convert to DDRT.	This service is commercial and the operator has confirmed is no longer viable. A North Guildford DDRT service to be introduced by September 2023.
41	Ash-Ash Vale-North Camp-Farnborough Park-Farnborough-Frimley Park Hospital	Mon-Fri	This is a Hampshire County Council contracted bus service that extends into Surrey which is also under review. Consideration to be given to introduce DDRT to areas in Surrey without alternative transport options.	Hampshire CC have withdrawn this contract. In Surrey, Ash Hill Road between Wharf Road & Guildford Road, and Stratford Road in Ash Vale will be unserved and the usage here is extremely low. Residents will still have direct links to Aldershot (on the 3 & Kite), Camberley (3) and Guildford (Kite). Farnborough can be accessed by bus into Aldershot and change on to route 1. Tongham will be included in the Farnham area DDRT.
42	Guildford-Godalming-Cranleigh	Mon-Sat	Withdraw from Catteshall Lane Godalming, Ifold and Loxwood; considering maintaining Godalming College journeys and converting the rest of the service to DDRT.	This service is commercial, and the operator is revisiting the longer term viability of maintaining the service along Catteshall Lane in Godalming. To be withdrawn from Ifold, Loxwood and Plaistow in W.Sussex. No change to Godalming College journeys.
409	Lingfield-Caterham-Whyteleafe-Warlingham	Sunday	Withdraw 409 Sunday service and include Sundays in the existing Tandridge Demand Responsive Transport service.	No change to existing Sunday service now proposed.
503	Lane End, Hambledon, Hydestile, Godalming, Farncombe, Bramley, Womersley, Chilworth, Shalford, and Guildford	Mon/Wed/Fri	Convert to DDRT.	A DDRT service will be introduced by September 2024 to provide alternative travel opportunities along this route.
504	Clovelly Rd, Hindhead, Lion Lane, Shottermill, Hammer Hill, Sickle Hill Estate, and Haslemere	Tues/Thurs	Convert to DDRT.	A DDRT service will be introduced by September 2024 to provide alternative travel opportunities along this route.
505	Northchapel, Fisher Street, Gospel Green, Haslemere, and Shottermill	Tues/Thurs	Convert to DDRT.	A DDRT service will be introduced by September 2024 to provide alternative travel opportunities along this route.

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Annex C

Service	Route	Days of operation	September 2023 Consultation Proposals	Final Proposals Post Consultation
520	Aldershot, Ash Road, Tongham, Ash Green, Shawfields, Ash, Normandy, Fairlands, Royal Surrey Hospital, Park Barn, and Guildford	Tues/Wed/Fri	Convert to DDRT.	A DDRT service will be introduced by September 2024 to provide alternative travel opportunities along this route.
523	Guildford, Farncombe, Godalming, Busbridge, and Milford Hospital	Tues/Thurs	Convert to DDRT.	A DDRT service will be introduced by September 2024 to provide alternative travel opportunities along this route.
525	Albury-Chilworth-Cranleigh	Thursday	Convert to DDRT.	A DDRT service will be introduced by September 2024 to provide alternative travel opportunities along this route.
533	Ewhurst-Ockley-Dorking-Ranmore	Tuesday	Convert to DDRT.	A DDRT service will be introduced by September 2024 to provide alternative travel opportunities along this route. Passengers on the section of route within Mole Valley will be able to use the Mole Valley Connect service which is being expanded to cover the whole of the district May 2023.
538	Stoughton, Bellfields, Slyfield Green, Jacobs Well, and Burpham Sainsbury's	Tues/Fri	Convert to DDRT.	A DDRT service will be introduced by September 2024 to provide alternative travel opportunities along this route. The proposed North Guildford DDRT service scheduled to start September 2023 will provide alternative travel opportunities for some residents.
545	Walliswood-Forest Green-Holmbury St Mary-Blackheath-Guildford	Wednesday	Withdraw from Holmbury St Mary and Sutton Abinger OR convert to DDRT.	Withdraw from Holmbury St Mary and Sutton Abinger. Passengers on the section of route within Mole Valley will be able to use the Mole Valley DDRT Connect service which is being expanded to cover the whole of the district May 2023.
599	Holmbury St Mary-Forest Green-Ewhurst-Cranleigh-Smithwood Common-Wonersh-Guildford	Thur/Fri	Withdraw from Holmbury St Mary and Sutton Abinger OR convert to DDRT.	Withdraw from Holmbury St Mary and Sutton Abinger. Passengers on the section of route within Mole Valley will be able to use the Mole Valley DDRT Connect service which is being expanded to cover the whole of the district May 2023.
DRT	Tandridge area Demand Responsive Transport	Mon-Fri	Enhance existing Demand Responsive Transport service (DRT) to Digital Demand Responsive Transport.	Will convert to DDRT. This will be in two phases; Phase 1 by September 2023 and Phase 2 scheduled for September 2024.
Hoppa	Waverley & Farnham Demand Responsive Transport	Mon-Fri	Enhance existing Demand Responsive Transport service (DRT) to Digital Demand Responsive Transport.	Will convert to DDRT. Initial phase by September 2023 with a potential expansion by September 2024.

Question	Answer
Did you use the EIA Screening Tool? (Delete as applicable)	Yes (please attach upon submission) / No

1. Explaining the matter being assessed

Question	Answer
What policy, function or service change are you assessing?	Bus service provision, prioritisation for investment and the expansion of Digital Demand Responsive Transport (DDRT).

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Why does this EIA need to be completed?

The bus industry facing extremely difficult operating conditions. Costs have increased significantly, passenger numbers are still not back to those before the pandemic and Government recovery funding is going to end in March 2023. This means that the money the county council has to pay for local bus services will not pay for the same services in future as it does currently.

In a letter, it was made clear that the Department for Transport expects to see Local Transport Authorities work with bus operators to “build a financially sustainable bus network.”

At the same time, we are also expected, as part of our BSIP, that we will grow patronage, reduce journey times, improve bus punctuality and improve customer satisfaction.

Following further guidance from the Department for Transport (DfT) on the network review, we undertook an extensive piece of work with the bus operators to understand their operating costs and cost pressures on a route by route basis. This resulted in a number of routes where the operators were asking for additional funding to keep routes running as they do currently. Changes to 24 routes were proposed for change by:

1. Reducing the frequency, hours or days of operation; and/or
2. The potential to withdraw the service.

This work led to the public consultation that was held from November 2022 to January 2023.

One of the most important things that supports bus services is investing in bus priority. Examples of this are bus lanes, bus gates or changing traffic signals to prioritise buses. This can make bus services be more reliable and have faster journey times. These make buses a better option for people to use. To do this can also mean that it makes journeys slower for cars.

Investment in bus priority also has investment in accessibility and information improvements both of which encourage bus use.

The final aspect of the consultation was expanding Digital Demand Responsive Transport (DDRT). Where services may be removed as a result of the cost pressure on the service and reduced passenger numbers, the route may be replaced by a DDRT offer.

Question	Answer
	<p>DDRT is not a timetabled bus service and people have to book in advance using a mobile phone app or by phoning the provider or a call centre. Because of this, some people may not see it as a viable alternative for a timetabled bus. It does offer greater flexibility and hours of operation than some of the infrequent services in Surrey.</p> <p>The consultation asked for views on all three aspects:</p> <ol style="list-style-type: none"> 1. Investment in bus infrastructure – bus priority, bus stops, real time information etc; 2. The proposed changes to bus services; and 3. A potential expansion of Digital Demand Responsive Transport <p>Not part of the consultation but being assessed is introducing a 20s and Under Half Fare Scheme. This would provide half price bus travel for Surrey residents aged between five and 20. This would be a smart card issued. The renewal process and when it will be necessary for people to renew their pass is still being determined.</p> <p>Should this be agreed, it will be available to all Surrey residents based on age.</p>
<p>Who is affected by the proposals outlined above?</p>	<p>Anyone who uses the bus routes listed in the consultation where proposals are to change or withdraw a route.</p> <p>Any bus use, or potential bus user, in areas where it is suggested to target investment.</p> <p>People aged five to 20, should a half price fare scheme be introduced.</p>
<p>How does your service proposal support the outcomes in the Community Vision for Surrey 2030?</p>	<ul style="list-style-type: none"> ▪ Children and young people are safe and feel safe and confident. ▪ Everyone benefits from education, skills and employment opportunities that help them succeed in life. ▪ Everyone lives healthy, active and fulfilling lives, and makes good choices about their wellbeing. ▪ Residents live in clean, safe and green communities, where people and organisations embrace their environmental responsibilities. ▪ Journeys across the county are easier, more predictable and safer. ▪ Everyone has a place they can call home, with appropriate housing for all. ▪ Businesses in Surrey thrive. ▪ Well-connected communities, with effective infrastructure, that grow sustainably.

Question	Answer										
<p>Are there any specific geographies in Surrey where this will make an impact?</p> <p>(Delete the ones that don't apply)</p>	<ul style="list-style-type: none"> • County-wide <p>However, it is likely that priority areas and routes will need to be identified for targeting available funding that will boost bus use most quickly.</p> <p>These locations will most likely be key towns or routes between towns.</p> <p>There may be a negative impact on more rural services as well as services in some smaller towns and villages where services may be reduced or withdrawn</p> <p>More rural areas of Surrey are the focus of new Digital Demand Responsive Transport. These areas are likely to have low frequency bus services and would benefit from Demand Responsive Transport (DRT).</p>										
<p>Briefly list what evidence you have gathered on the impact of your proposals</p>	<p>Consultation feedback, from both residents and stakeholders.</p> <p>Passenger numbers show that the number of trips on the services where changes are proposed might impact less than one per cent of all bus trips in Surrey.</p> <p>Feedback from all the Disability Empowerment Networks, the Surrey Vision Action Group and ATLAS Surrey.</p> <p>Concessionary pass holder numbers. Because of how this data is collected we are not able to separate out older people from disabled pass holders. Overall, concessionary bus pass use is lower than pre-pandemic levels and not going back as quickly as other passengers.</p> <p>Current total concessionary pass holder numbers are, as of December 2022:</p> <table border="0" data-bbox="555 1489 1279 1680"> <tr> <td>Disabled +C</td> <td>2,323</td> </tr> <tr> <td>Senior +C</td> <td>383</td> </tr> <tr> <td>Senior</td> <td>148,946</td> </tr> <tr> <td>Disabled</td> <td>4,776</td> </tr> <tr> <td>Total</td> <td>156,428</td> </tr> </table> <p>A desk based report looking at the areas affected by the consultation and the Indices of Multiple Deprivation.</p>	Disabled +C	2,323	Senior +C	383	Senior	148,946	Disabled	4,776	Total	156,428
Disabled +C	2,323										
Senior +C	383										
Senior	148,946										
Disabled	4,776										
Total	156,428										

2. Service Users / Residents

There are ten protected characteristics to consider in your proposal. These are:

1. Age including younger and older people
2. Disability
3. Gender reassignment
4. Pregnancy and maternity
5. Race including ethnic or national origins, colour or nationality
6. Religion or belief including lack of belief
7. Sex
8. Sexual orientation
9. Marriage/civil partnerships
10. Carers protected by association

Though not included in the Equality Act 2010, Surrey County Council recognises that socio-economic disadvantage is a significant contributor to inequality across the County and therefore regards this as an additional factor.

Therefore, if relevant, you will need to include information on this. Please **refer to the EIA guidance** if you are unclear as to what this is.

All Equalities groups will be impacted by some or all of proposals that may be implemented

Question	Answer
<p>What information (data) do you have on affected service users/residents with this characteristic?</p>	<p>The feedback from the consultation response, including demographic information to help assess impacts on people with protected characteristics.</p> <p>Responses from stakeholders that highlight issues people with protected characteristic would face.</p> <p>We have patronage data from the bus operators on use of the services covered by the consultation. This does not separate people out by protected characteristic outside of where we know someone has used a concessionary pass or the bus is a school service. This would then tell us that older and or disabled concessionary pass holders and school children are using the services. This data showed that the journeys made on the services under review and described in the consultation, which are counted as single trips, are less than 1 per cent of all bus journeys made in Surrey.</p> <p>We hold information related to age and disability because of having information on concessionary bus pass holders. We also have information children who use school services and holders of the Student Fare Card that allows for discounted travel for people in full time education.</p> <p>We hold a significant amount of information from historic bus and transport consultations that cover other protected characteristics and other information related to bus use and barriers to use. The main barriers being:</p> <ul style="list-style-type: none"> - Reliability. Will the bus arrive and get me where I want when I need it to? - Affordability. Is bus travel a viable transport option compared to driving, the train or other transport? And - Accessibility. Can I use a bus stop and a bus with my mobility needs? Can I get information in a format and way that is usable for me? <p>The Future Bus Network Review Consultation Feedback Analysis shows that:</p> <ul style="list-style-type: none"> - about 45 per cent of respondents said they had a Concessionary Bus Pass. With around five per cent of them having a Disabled Person's Bus Pass - over 85 per cent of respondents are from a White ethnic background. 6 per cent preferred not to state their ethnicity. Around two per cent of respondents stated they are of Asian ethnicity. This was similar to those stating they are from a mixed ethnic background - the majority of respondents were female. With just over 50 per cent of respondents saying they are female and just under 40 per cent stating they are male. Nearly 90 per cent stated this was the same

Question	Answer
	<p>gender as they were at birth with half of one per cent stating they are a different sex to that at birth and seven per cent preferring not to say.</p> <ul style="list-style-type: none"> - Nearly 59 per cent of respondents said they did not have a disability or long-term illness. The summary breaks down the options for the nearly 40 per cent of respondents for did state they have a disability or long-term illness. - Nearly 47 per cent of respondents were over 65. Less than four per cent were under 18. Fewer than ten per cent were under 34. - Just under 25 per cent of respondents said they were a carer for someone due to illness or disability. Just under 65 per cent said they had no caring responsibility. <p>A desk-based report was produced that looked at parts of Surrey impacted by the proposals for bus service changes. This report identified seven areas near or where changes are proposed that are also identified as Key Neighbourhoods. This is based on these areas score on the Indices of Multiple Deprivation.</p> <p>These areas are:</p> <ul style="list-style-type: none"> • Hooley, Merstham and Netherne, • Stoke (Guildford), • Tattenham Court and Preston, • Court (Epsom and Ewell), • Redhill West and Wray Common, • Horley Central and South and • Ash Wharf <p>For this Impact Assessment, this report and the consultation summary were compared to try to link numbers of respondents to the consultation and if they may be from one of these areas. This proved difficult to link because of the size of some post code areas and the respective size of these wards. For example, the post codes for Hooley and Merstham are CR5 and RH1. There were 156 respondents to the consultation who gave these posts. However, these also cover some large areas such as Redhill so makes it difficult to relate responses to the consultation as people from these seven areas.</p> <p>In most instances, the proposals are to reduce evening and weekend services rather than withdraw all services. The report also highlights that in some of the identified areas may have access to alternative bus services because of how close they may be to other routes. However, this is not the true in all areas.</p>

Question	Answer
<p>Impacts (Delete as applicable)</p>	<p>Positive – Investment in bus priority will help support bus services operate effectively and support those people who currently use them. It is also hoped to encourage new bus users. This investment will benefit people with any protected characteristic. However, this investment will need to be targeted in areas and on routes where it is felt that passenger growth is most likely. Positive improvements will not be seen countywide.</p> <p>Positive - Some residents may see a DDRT scheme is a better option than a scheduled bus because of the door to door service and more flexible operating hours. For example, the Mole Valley Connect Service operates from 7 am. to 7 pm. Monday to Saturday. If a similar service were introduced in areas where there is a timetabled service, for example, two days a week, people may see this as a better offer.</p> <p>Positive – A half price fare scheme for Surrey Residents aged five to 20 would help with the cost of transport being a barrier to regular bus use. This would also help people in that age range who are eligible for a Disabled Person's Concessionary Bus Pass as it would give them half price travel before 9.30 am. after which they can travel for free with their Disabled Person's Bus Pass.</p> <p>Negative – Some proposals for routes suggest evening and Sunday services be withdrawn. This will impact people who want to make leisure or shopping trips or those work in hospitality. If a current of new Demand Responsive Transport offer does not work in the evening or on Sundays, this will leave people without a public transport option at those times.</p> <p>Some proposals suggest withdrawing a route completely. If that happens, people will be left without a public transport option or they will need to use Demand Responsive Transport, which they may have never used before.</p> <p>Replacing a bus service with a DDRT scheme may be seen as being more difficult to use opposed to a scheduled bus service. Particularly if concessionary bus passes are not accepted on these services. Also, where people with learning difficulties who have had Travel Training to use the bus will be unfamiliar with having to book a minibus to make the same journey. This would restrict their ability to travel.</p> <p>As well as this, should a group of people want to make a similar journey at a similar time as they do currently on the timetabled service, they may find that there is not the same availability on a DRT service.</p>

Impacts identified	Supporting evidence	How will you maximise positive/minimise negative impacts?	When will this be implemented by?	Owner
What impacts have you identified?	What are you basing this on?	Actions to mitigate or enhance impacts	Due date	<i>Who is responsible for this?</i>
Bus priority improvement	Improved journey times and reliability. Providing better information to travellers. Investment in new buses.	Advertising availability of a scheme	This is an ongoing programme of work with spending in each financial year.	The Strategic Transport Group at Surrey County Council and the Enhanced Partnership Board
Service reductions or removals	Bus patronage and cost	Expansion of and advertising of DDRT. Further engagement with operators who as making assessments on the affordability of services using information updated on travel and the wider financial position for the bus industry. This may mean that some of the proposals in the consultation may not need to happen.	Subject to Cabinet decision	Strategic Transport Group at Surrey County Council
Expansion of DDRT (Positive and Negative)	Positive feedback to the MV Connect service. Replacement of scheduled bus service may be a barrier to people using this type of service	Advertising availability of each DRT scheme	Subject to Cabinet decision	Strategic Transport Group at Surrey County Council

Impacts identified	Supporting evidence	How will you maximise positive/minimise negative impacts?	When will this be implemented by?	Owner
A half fare scheme for people aged five to 20	Reducing fares is an aim of the National Bus Strategy and the Surrey Bus Service Improvement Plan (BSIP) as cost is often quoted as a barrier to travel	Advertising availability of a scheme	Subject to agreement by the Enhanced Partnership Board & Cabinet	The Strategic Transport Group at Surrey County Council and the Enhanced Partnership Board

Question	Answer
<p>What other changes is the council planning/already in place that may affect the same groups of residents?</p> <p>Are there any dependencies decisions makers need to be aware of</p>	<p>The Government have recently announced the National Disability Strategy. A large part of that strategy is focused on transport. The previous version of the BSIP and the revised version have elements in them to support disabled bus users and potential bus users. These are mainly focused on physical accessibility but also included training, ease of information availability before and during journeys, amongst others.</p> <p>Being 'greener' and looking to get greener buses on our roads will help with air quality and the county council's aspiration to be carbon neutral by 2030 and as a county by 2050.</p> <p>The National Bus Strategy (Bus Back Better), puts a responsibility on Local Transport Authorities to grow bus patronage. This needs to be reported on twice a year to the Department for Transport and includes improvements to journey times, reliability and customer satisfaction, as well as overall passenger numbers. This means that we need to look at investment that will support improving those targets. As a result, this means the spend on buses may be reallocated. This will positively impact some and negatively other bus uses, depending on where investment is made.</p>

Question	Answer
<p>Any negative impacts that cannot be mitigated? Please identify impact and explain why</p>	<p>Feedback from the consultation, from both the public and stakeholders, is that negative impacts will mainly be based on Age and Disability. Where services are school services, these will affect younger people, their parents and / or carers who will need to find alternative transport. There may also be an issue for people with learning difficulties and / or autism who have received, or are receiving, Travel Training or rely on routines to support their independent living. Changes to bus services and / or requiring people to use alternative transport may create problems for those people in their travel requirements.</p> <p>Where services are daytime, weekend or evening services, are proposed to be reduced, these will affect anyone with a protected characteristic who uses the routes covered in the consultation.</p>

You will need to copy and paste these boxes for each of the protected characteristics likely to be impacted.

3. Staff

All staff who use buses will have the same impacts as those covered in the equalities section above

Question	Answer
What information (data) do you have on affected service users/residents with this characteristic?	As per section 2
Impacts (Delete as applicable)	Positive & Negative.

Impacts identified	Supporting evidence	How will you maximise positive/minimise negative impacts?	When will this be implemented by?	Owner
What impacts have you identified?	What are you basing this on?	Actions to mitigate or enhance impacts	Due date	Who is responsible for this?

Question	Answer
What other changes is the council planning/already in place that may affect the same groups of residents? Are there any dependencies decisions makers need to be aware of	If so, please detail your awareness of whether this will exacerbate impacts for those with protected characteristics and the mitigating actions that will be taken to limit the cumulative impacts of these changes.

Question	Answer
Any negative impacts that cannot be mitigated? Please identify impact and explain why	Same as Section 2.

You will need to copy and paste these boxes for each of the protected characteristics likely to be impacted

4. Amendments to the proposals

CHANGE	REASON FOR CHANGE
What changes have you made as a result of this EIA?	Why have these changes been made?
Exploration of changing Travel Training arrangements with Children Families, Lifelong Learning & Culture (CFLLC) to support Demand Responsive Transport us as well as bus services	Some people may be able to change their travel with proper support. This will need to be developed over the spring and summer so any person who may benefit from this type of training ready for any changes starting in September 2023.

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5. Recommendation

Based your assessment, please indicate which course of action you are recommending to decision makers. You should explain your recommendation below.

Outcome Number	Description	Tick
Outcome One	No major change to the policy/service/function required. This EIA has not identified any potential for discrimination or negative impact, and all opportunities to promote equality have been undertaken	
Outcome Two	Adjust the policy/service/function to remove barriers identified by the EIA or better advance equality. Are you satisfied that the proposed adjustments will remove the barriers you identified?	
Outcome Three	Continue the policy/service/function despite potential for negative impact or missed opportunities to advance equality identified. You will need to make sure the EIA clearly sets out the justifications for continuing with it. You need to consider whether there are: <ul style="list-style-type: none"> • Sufficient plans to stop or minimise the negative impact • Mitigating actions for any remaining negative impacts plans to monitor the actual impact. 	✓
Outcome Four	Stop and rethink the policy when the EIA shows actual or potential unlawful discrimination (For guidance on what is unlawful discrimination, refer to the Equality and Human Rights Commission's guidance and Codes of Practice on the Equality Act concerning employment, goods and services and equal pay).	

Question	Answer
<p>Confirmation and explanation of recommended outcome</p>	<p>Recommended Outcome Three.</p> <p>Following the consultation, there is support for investment in buses to help grow passenger numbers and provide a better service for current bus users. However, it is not possible to fund improvements on a countywide basis.</p> <p>With many people being neutral toward expanding DDRT, there may be more work that needs to be done with people at a more local level to communicate what the service is, how it works and how it is different from a public timetabled bus route. However, as there were many suggestions for other areas to have DDRT scheme included, there seems to be a desire to have this form of transport in Surrey.</p> <p>Consideration is given to amending routes or ensuring there is some alternative provision, such as other buses in the area or Community Transport, rather than full withdrawal of bus services.</p> <p>There will be negatives impacts for some residents, some of which cannot be fully mitigated, or the mitigation may not be suitable for every current bus user. However, the pressure on costs of bus services, that there will be some form of alternative transport offer, that most services are being reduced rather than completely withdrawn and that the number of bus users affected is less than one per cent of all Surrey bus trips, it is suggested that it is reasonable to progress with recommendations.</p>

6a. Version control

Version Number	Purpose/Change	Author	Date
0.2	Update following consultation close	Keith McKain	02/02/2023
0.3	Update following document review	Keith McKain	09/02/2023
0.4	Updated following Head of Service review	Keith McKain	20/02/2023

The above provides historical data about each update made to the Equality Impact Assessment. Please do include the name of the author, date and notes about changes made – so that you are able to refer back to what changes have been made throughout this iterative process. For further information, please see the EIA Guidance document on version control.

6b. Approval

Approved by*	Date approved
Head of Service	Lucy Monie
Executive Director	Katie Stewart
Cabinet Member	Matt Furniss
Directorate Equality Group	N/A

EIA Author	Keith McKain
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*Secure approval from the appropriate level of management based on nature of issue and scale of change being assessed.

6c. EIA Team

Name	Job Title	Organisation	Team Role
Keith McKain	Programme Manager, National Bus Strategy	SCC	Author

If you would like this information in large print, Braille, on CD or in another language please contact us on:

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Annex E

**Bus Service
Improvement
Programme Route
Analysis**

Research Report

October 2022



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Introduction

In October 2021, Surrey County Council (SCC) set out its Bus Service Improvement Plan (BSIP) in response to the Government's Bus Back Better national strategy. The ambitions set out in the BSIP were largely dependent on additional funding of over £100 million being provided by Department for Transport. SCC were notified in April 2022 that such funding would not be provided. However, SCC must still seek to deliver the aims and objectives of the BSIP and report to Department for Transport (DfT) on progress. This includes improvements to journey times, reliability, passenger numbers and passenger satisfaction.

This report identifies the correlation between service reductions and withdrawals within the BSIP proposals and the 21 Key Neighbourhoods within the Health and Wellbeing Strategy.

These Key Neighbourhoods have been established as those which include the most deprived "pockets" within the county, based on analysis of Indices of Multiple Deprivation (IMD) data. Key Neighbourhoods are geographically analogous to wards.

When reading this analysis, it is important to note that it does not incorporate detailed service data on how often a service is used, nor does it contain information about the cost of the service. The analysis does not make any specific recommendations relating to the BSIP.

The methodology applied in this analysis was as follows:

Firstly, the route maps of the list of services within the proposal was cross referenced against the locations of the Key Neighbourhoods.

Secondly, the demographics of the identified Key Neighbourhoods was explored, using statistical data produced by the Population Insights Team, to contextualise the service proposals.

Thirdly, the wider local transport context of the Key Neighbourhoods was examined qualitatively to provide further context. For example, whether other bus services are present and if the route provides access to certain public services such as a hospital.

The report was authored by Declan McDowell-Naylor.

Declan McDowell-Naylor, Research Officer, Surrey County Council.

For further information about this research report, please contact:

declan.mcdowellnaylor@surreycc.gov.uk

Executive Summary

- 1.1 Seven Key Neighbourhoods were identified as containing or being in proximity to proposed service reductions and withdrawals. These are: Hooley, Merstham and Netherne; Stoke (Guildford); Tattenham Court and Preston; Court (Epsom and Ewell); Redhill West and Wray Common; Horley Central and South; and Ash Wharf.
- 1.2 Tattenham Corner and Preston has the highest number of services with proposed service reductions and withdrawals (5), including the withdrawal of three school services. The area has the fourth highest number of single parent households claiming Universal Credit within Surrey.
- 1.3 Redhill West and Wray Common has the second highest number of services with proposed service reductions and withdrawals (four), but due to its proximity to the centre of Redhill still has access to several transport services.
- 1.4 The Metrobus 460 service route, where there is a proposal to reduce evening services and the Sunday service is contained within or is in close proximity to four Key Neighbourhoods: Court (Epsom and Ewell); Redhill West and Wray Common (Reigate and Banstead); Tattenham Corner and Preston (Reigate and Banstead); and Horley Central & South (Reigate and Banstead).
- 1.5 The rate of households without access to a car is above the average for Surrey in all of the Key Neighbourhoods, with the exception of Ash Wharf. Redhill West and Wray Common has the highest proportion of households without car access, at +8.5 per cent the Surrey average.
- 1.6 Asian ethnic groups are the most significant non-white ethnic group across all the Key Neighbourhoods. In Court, 12 per cent of the population is from an Asian ethnic group and in Redhill West and Wray Common the figure is 10 per cent.
- 1.7 None of the Key Neighbourhoods have a population of young people that appears to stray significantly from the average for Surrey.
- 1.8 All of the Key Neighbourhoods have indicators of disability that are much higher than the average for Surrey. The Surrey average for working age people receiving Personal Independence Payment is 3.7 per cent. The range across the Key Neighbourhoods is 7.8–13 per cent.

21 Key Neighbourhoods: Service Reductions or Withdrawal

Notes

The key neighbourhood sections below have been purposefully written in a modular style to allow for ease of sharing with specific local stakeholders, if necessary. This means there is some minor duplication in the description of service routes.

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Proposed Service Reductions and Withdrawals

As per the list provided, the following reductions and withdrawals to services have been proposed:

- **Safeguard 3 (Guildford – Bellfields)** Currently running daily at 20-minute intervals with proposals to reduce to 30-minute intervals
- **Metrobus 100 (Crawley – Horley – Redhill)** Currently running daily at 15-minute intervals with proposals to reduce the evening and night services
- **Metrobus 281 (Crawley – Cophorne – East Grinstead – Lingfield)** Currently running Monday to Saturday at approximately two-hour intervals with proposals to withdraw the Lingfield service, but maintain the school journeys
- **Metrobus 400 (Caterham – Redhill – Horley – Crawley – East Grinstead)** Currently running daily at hourly intervals, with plans to withdraw the Sunday service.
- **Metrobus 430 (Merstham – Reigate)** Currently running daily at 30-minute intervals, with proposals to reduce the frequency of the service and reduce evening services.
- **Metrobus 435 (Merstham – Reigate)** Currently running daily at 30-minute intervals, with proposals to reduce the frequency of the service and reduce evening services.
- **Metrobus 460 (Epsom – Crawley)** Currently running daily at hourly intervals, with proposals to reduce evening services and the Sunday service.
- **Metrobus 480 (Epsom – Tadworth)** Currently running daily at 20 or 40-minute intervals, with proposals to reduce evening services and the Sunday service.
- **Carlone 545 (Walliswood – Guildford)** One round trip on a Wednesday, with proposal to shorten route or convert to DRT
- **Carlone 599 (Sutton – Abinger)** One round trip on a Thursday and Friday, with proposal to shorten route or convert to DRT.
- **Cardinal 615 (Chipstead – Leatherhead)** School service, with proposals to withdraw service.
- **Cardinal 617 (Banstead – Leatherhead)** School service, with proposals to withdraw service.
- **Cardinal 619 (Kingswood – Leatherhead)** School service, with proposals to withdraw service.
- **Carlone 694 (Lingfield – Oxted)** School service, with proposals to withdraw service.
- **Metrobus E9 (Epsom – Livingstone Park)** Currently running daily at 30-minute intervals, with proposals to reduce evening services and withdraw Sunday service.
- **Metrobus E10 (Epsom – Noble Park)** Currently running daily at 30-minute intervals, with proposals to reduce evening services and withdraw Sunday service.

Ten out of sixteen of these services have routes which are contained within, or in are proximity to, Key Neighbourhoods. The details of this are explained below.

Existing Service Reductions and Withdrawals

In addition, the following services are already operating at a reduced frequency or have had their route reduced.

- **Metrobus 20 (Pease Pottage – Horley)** Currently running daily at 20-minute intervals
- **Metrobus 32 (Guildford – Dorking – Redhill)** Currently running Monday to Saturday at hourly intervals.
- **Compass 42 (Cranleigh – Dunsfold – Godalming – Guildford)** Currently running Monday to Friday at two-hour intervals, with a reduced Saturday service.
- **Whitebus 48 (Frimley Hospital – Woking)** Currently running three trips Monday to Friday
- **Whitebus 81 (Woking – Woking)** Currently running two morning trips Monday to Friday.
- **Metrobus 93 (Horsham – Dorking)** Currently running daily at hourly intervals.
- **White Bus 437 (Woking – Brooklands)** Currently running eight trips Monday to Saturday, including a school service.
- **Diamond 458 (Kingston – Walton – Staines)** Currently running at Monday to Saturday at 30-minute intervals.
- **Whitebus 438 (Staines – Royal Estate)** Currently running five trips Monday to Saturday.
- **Whitebus 462 (Woking – Guildford)** Currently running Monday to Saturday at hourly intervals.
- **Whitebus 500 (Staines – Frimley Hospital)** Currently running Monday to Saturday at two-hour intervals.
- **Whitebus 566 (Staines – Staines)** Currently running two trips Monday to Saturday
- **Whitebus 567 (Staines – Staines)** Currently running seven trips Monday to Saturday

Exploring the effects of these service withdrawals may provide insight that can inform future decisions about bus service provision.

Key Neighbourhoods Identified

The following seven Key Neighbourhoods were identified as containing or being in proximity to a proposed service reduction or withdrawal.

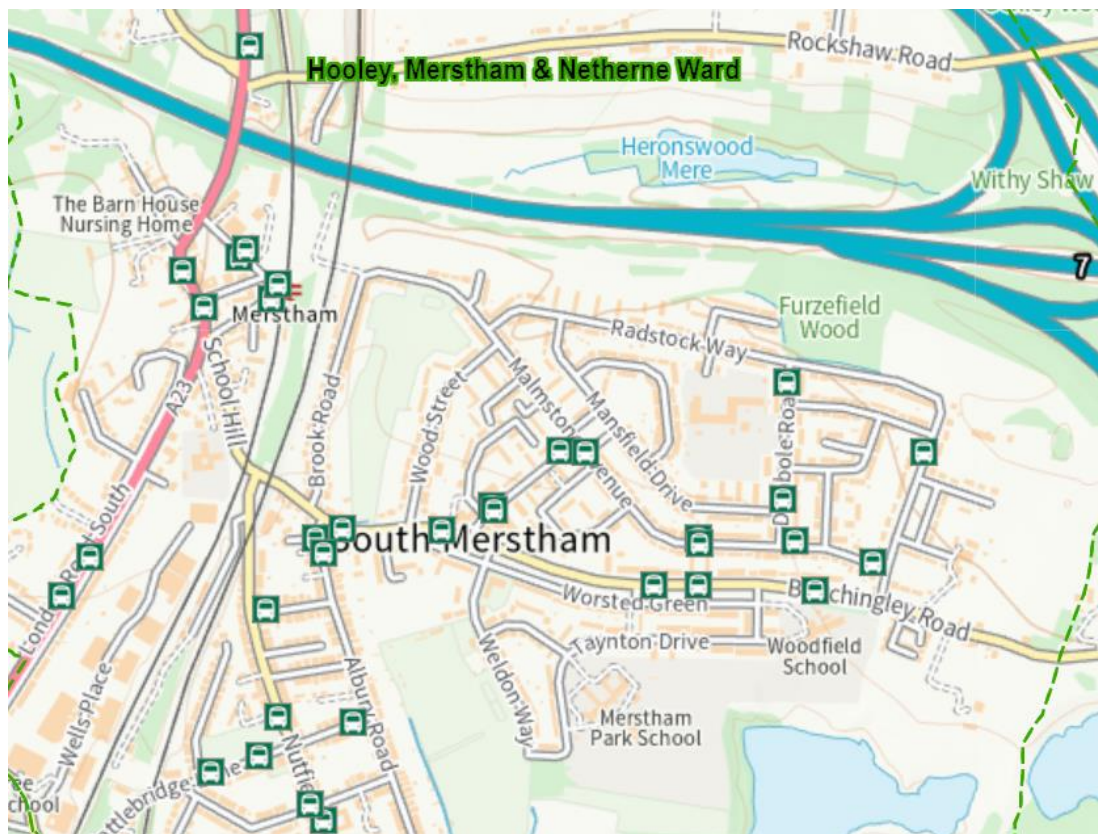
Hooley, Merstham and Netherne (Reigate and Banstead)

This key neighbourhood contains or is in proximity to the **Metrobus 430** and **Metrobus 435** services. Both services run directly through the Merstham area and provide a transport service to both Redhill and Reigate. Both services run daily at 30-minute intervals, switching to hourly intervals in the evening. There are proposals to reduce the frequency of the services and reduce evening services.

The ward of Hooley, Merstham and Netherne contains the most deprived Lower Layer Super Output Area (LSOA) area in the entirety of Surrey (Reigate and Banstead 008A), according to Indices of Multiple Deprivation (IMD) statistics. The rate of the population receiving unemployment benefit (July 2022) in this specific area is 4.4 per cent, which is more than twice the average for Surrey. As an indicator of disability, 13 per cent of the working age population receive Personal Independence Payments (April 2022), the highest rate among the Key Neighbourhoods. An estimated 20.1 per cent of the population are aged 0-15, which is about average within Surrey.

According to 2011 census figures, across the wider ward, 11.7 per cent of the population is non-white, with around 5 per cent made up of Asian ethnic groups. 17.6 per cent of households do not own a car, which is +4.5 per cent the Surrey average. As of May 2022, the ward has the sixth highest number of single parent households claiming Universal Credit, a total of 232 households.

Map of Hooley, Merstham and Nertherne, highlighting Merstham



In terms of the local transport context, this neighbourhood is also served by Transport for London's (TfL) 405 bus service (Croydon – Redhill) and Southdown's 411 bus service (Croydon – Redhill – Reigate). Merstham has a train station that connects directly to Redhill. Both the **Metrobus 430** and **Metrobus 435** services connect to East Surrey Hospital; 30 per cent of the population within the LSOA are reported as working in health.

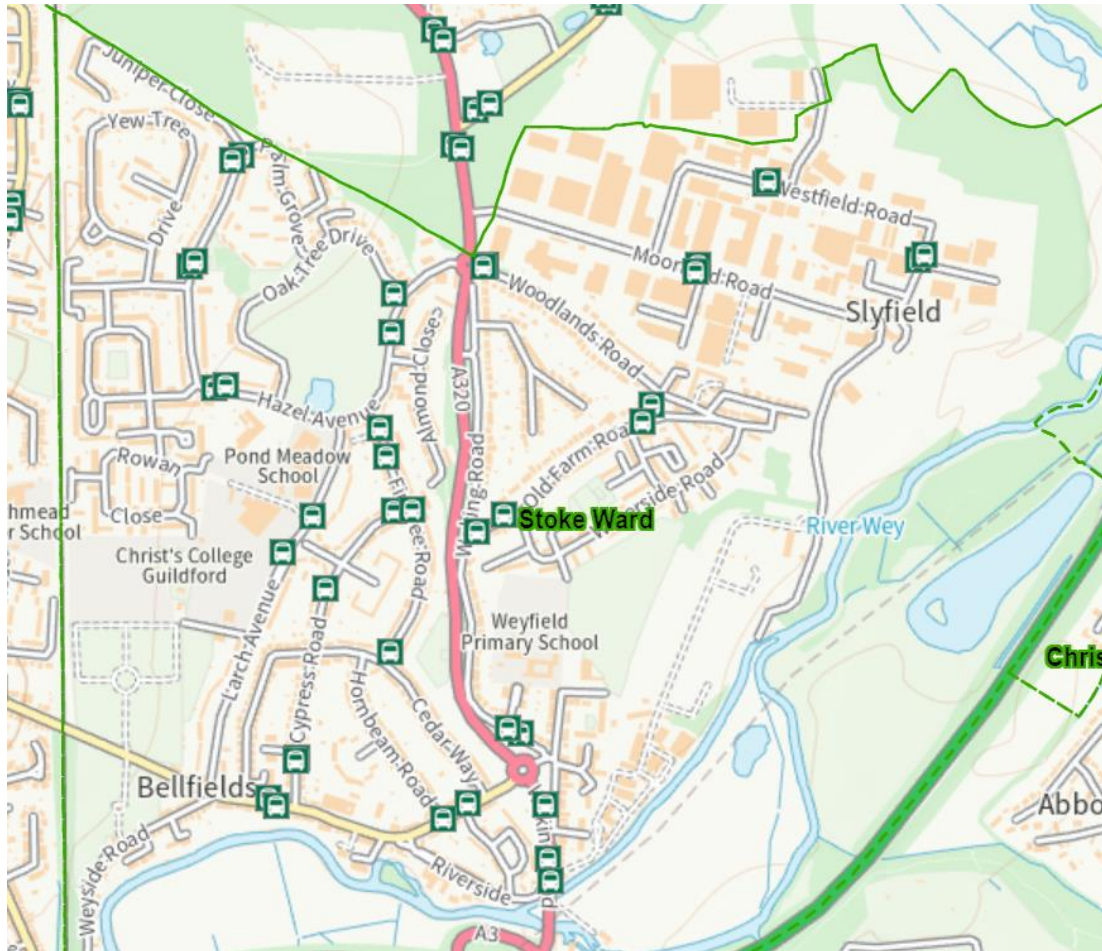
Stoke (Guildford)

This key neighbourhood contains or is in proximity to the **Safeguard 3** service. The service runs directly through the Stoke area and provides a service to and from Guildford town centre. The service currently runs daily at 20-minute intervals, with an hourly service on Sundays. The proposals are to reduce the service to 30-minute intervals.

The ward of Stoke contains the fourth most most deprived LSOA area in the entirety of Surrey (Guildford 007C), according to IMD statistics. The rate of the population receiving unemployment benefit (July 2022) in this specific area is 4.7 per cent, which is more than twice the average for Surrey. As an indicator of disability, 10.5 per cent of the working age population receive Personal Independence Payments (April 2022), the third highest rate among the Key

Neighbourhoods. An estimated 20 per cent of the population are aged 0-15, which is about average within Surrey.

Map of Stoke



According to 2011 census figures, across the wider ward, 8.3 per cent of the population is non-white, with around 4.5 per cent made up of Asian ethnic groups. 20.9 per cent of households do not own a car, which is +7.8 per cent the Surrey average. As of May 2022, the ward has the 26th highest number of single parent households claiming Universal Credit, a total of 154 households.

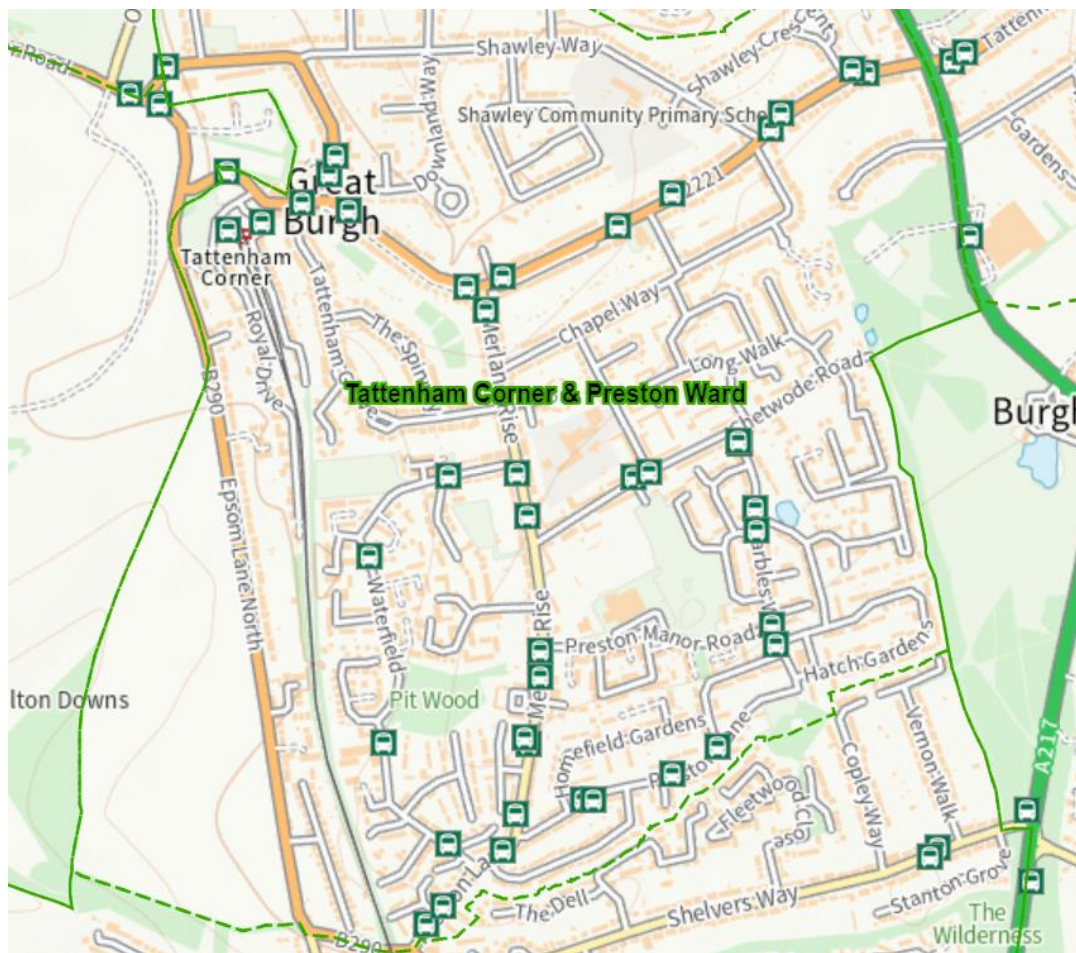
In terms of the local transport context, this neighbourhood is also served by Stagecoach's 34 service (Guildford – Camberley) and Stagecoach's 538 service (Stoughton – Burpham) – the latter of these is a once daily service. Stoke does *not* have a train station – the nearest station is Guildford Central. The **Safeguard 3** service broadly connects to amenities found in the centre of Guildford, including the library; 83 per cent of the population within the LSOA are reported as working in education.

Tattenham Corner and Preston (Reigate and Banstead)

This Key Neighbourhood contains or is in proximity to several services within the proposal. This includes the **Metrobus 460** service, running daily at hourly intervals, and the **Metrobus 480** service, running daily at 20 or 40-minute intervals. In both cases the proposal is to reduce

evening and Sunday services. The other services are the **Cardinal 615**, **Cardinal 617**, and **Cardinal 619** services, all of which are school services heading towards St Andrews School in Leatherhead, with the proposal being to withdraw these services.

Map of Tattenham Corner and Preston



The ward of Tattenham Corner and Preston contains the 7th most deprived LSOA area in the entirety of Surrey (Reigate and Banstead 005A), according to IMD statistics. The rate of the population receiving unemployment benefit (July 2022) in this specific area is 4.4 per cent, which is more than twice the average for Surrey. As an indicator of disability, 9.1 per cent of the working age population receive Personal Independence Payments (April 2022), the 6th highest rate among the Key Neighbourhoods. An estimated 23.2 per cent of the population are aged 0-15, which is slightly above average within Surrey.

According to 2011 census figures, across the wider ward, 8.2 per cent of the population is non-white, with around 4.5 per cent made up of Asian ethnic groups. 16.6 per cent of households do not own a car, which is +3.5 per cent the Surrey average. As of May 2022, the ward has the 4th highest number of single parent households claiming Universal Credit, a total of 263 households.

In terms of the local transport context, this neighbourhood is also served by Metrobus's 420 service (Sutton – Whitebushes). Tattenham Corner and Preston does have a train station, but it does not connect directly to Redhill. Both the **Metrobus 460** and **Metrobus 480** connect to

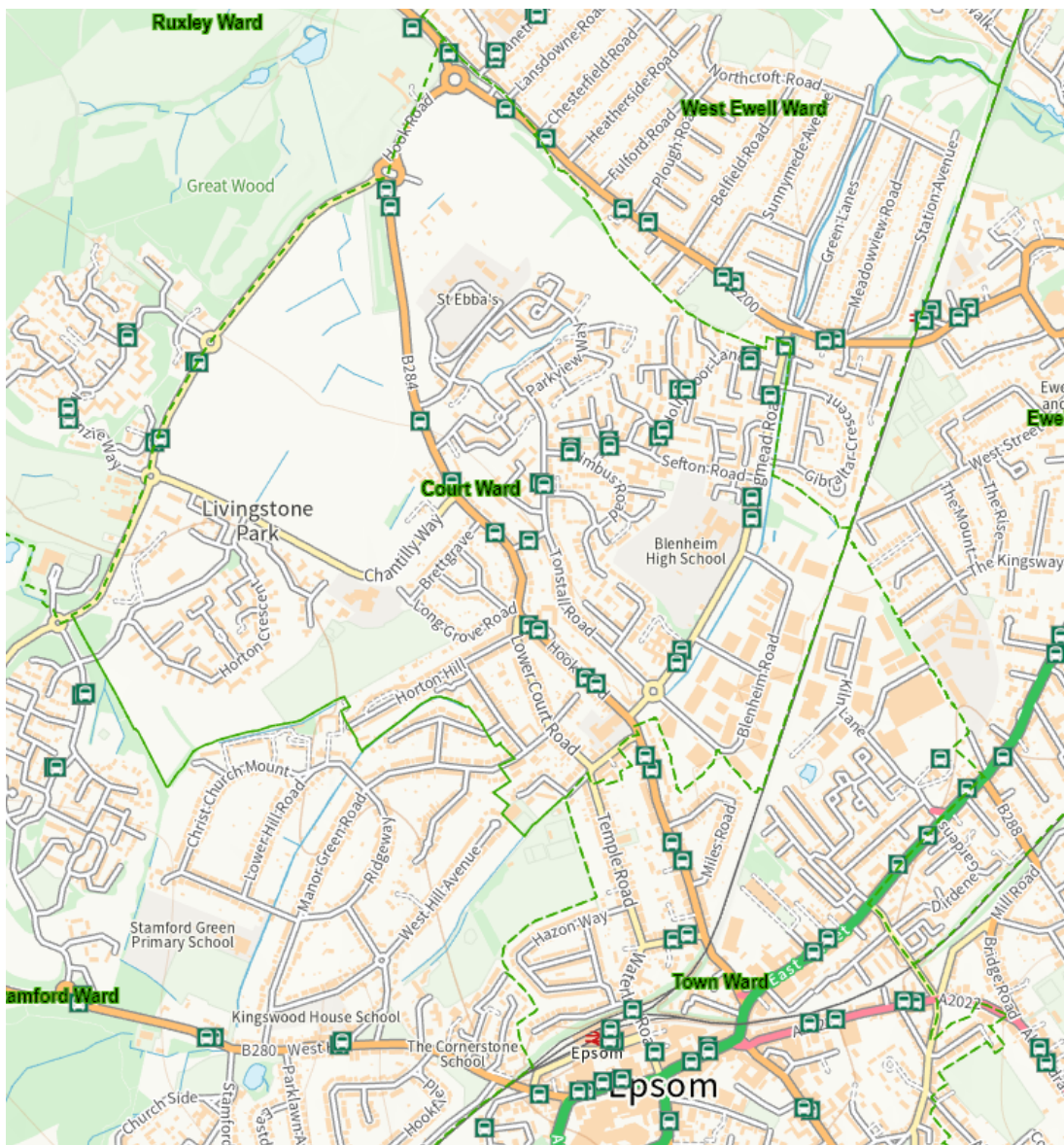
Epsom General Hospital. Crucially, the removal of the **Cardinal 615**, **Cardinal 617**, and **Cardinal 619** services appears to leave the area without a school service; 38.3 per cent of the children in absolute low-income families within the LSOA are in lone parent households.

Court (Epsom and Ewell)

As with the Tattenham Court and Preston Key Neighbourhood, Court contains or is in proximity to the **Metrobus 460** service, running daily at hourly intervals, and the **Metrobus 480** service, running daily at 20 or 40-minute intervals. In both cases the proposal is to reduce evening and Sunday services. Court also contains the **Metrobus E9** service, running daily at 30-minute intervals, with proposals to reduce evening services and withdraw the Sunday service.

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Map of Court



The ward of Court contains the 8th most deprived LSOA area in the entirety of Surrey (Epsom and Ewell 007A), according to IMD statistics. The rate of the population receiving unemployment benefit (July 2022) in this specific area is 4.7 per cent, which is more than twice

the average for Surrey. As an indicator of disability, 10.9 per cent of the working age population receive Personal Independence Payments (April 2022), the 2nd highest rate among the Key Neighbourhoods. An estimated 19.6 per cent of the population are aged 0-15, which is about average within Surrey.

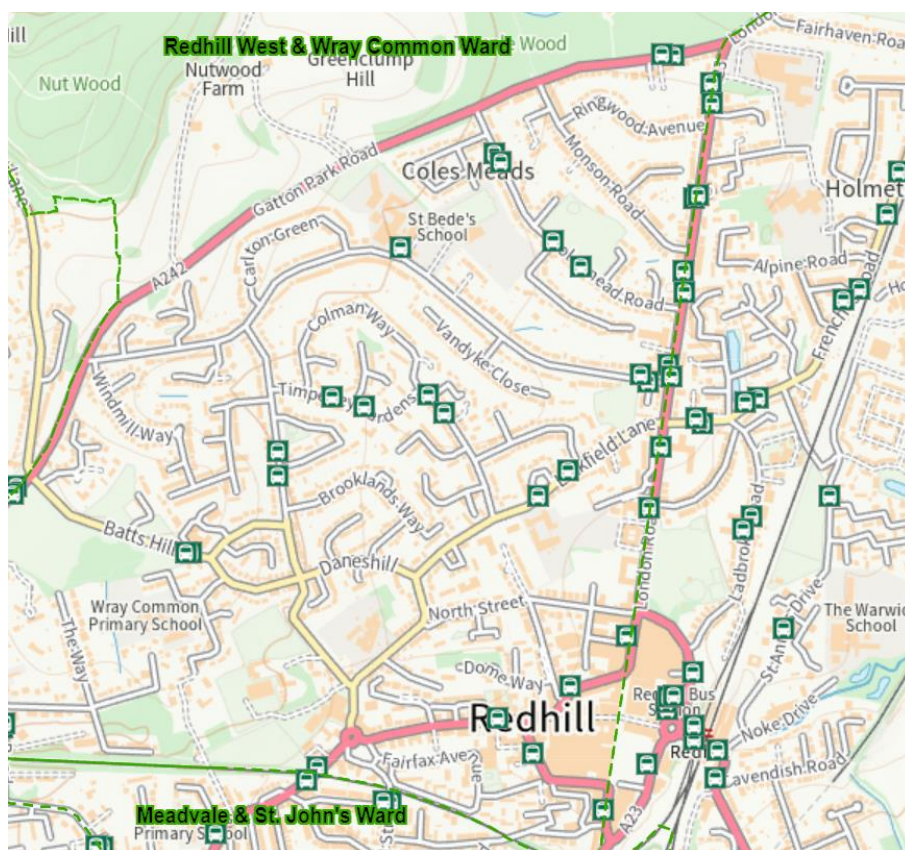
According to 2011 census figures, across the wider ward, 22 per cent of the population is non-white, with around 12 per cent made up of Asian ethnic groups. 19.7 per cent of households do not own a car, which is +6.6 per cent the Surrey average. As of May 2022, the ward has the 15th highest number of single parent households claiming Universal Credit, a total of 175 households.

In terms of the local transport context, this neighbourhood is also served by Falcon’s E5 service (Landlev Vale – Epsom – Watersedge). Court is located closely to Epsom train station. The **Metrobus 460** and **Metrobus 480** connect to Epsom General Hospital, while the **Metrobus E9** service is a circular route connecting the neighbourhood to central Epsom, St. Ebba’s Hospital and Stamford Green Primary School.

Redhill West and Wray Common (Reigate and Banstead)

As with Court and Tattenham Corner and Preston Court, the Key Neighbourhood of Redhill West and Wray Common contains or is in proximity to the **Metrobus 460** service, running daily at hourly intervals, and the **Metrobus 480** service, running daily at 20 or 40-minute intervals. In both cases the proposal is to reduce evening and Sunday services. This key neighbourhood is also in proximity to the **Metrobus 100** service, running daily at 15-minute intervals with proposals to reduce the evening and night services, and the **Metrobus 400** service, currently running daily at hourly intervals, with plans to withdraw the Sunday service.

Map Redhill West and Wray Common



The ward of Redhill West and Wray Common contains the 17th most deprived LSOA area in the entirety of Surrey (Reigate and Banstead 010E), according to IMD statistics. The rate of the population receiving unemployment benefit (July 2022) in this specific area is 3.8 per cent, which is just under twice the average for Surrey. As an indicator of disability, 7.8 per cent of the working age population receive Personal Independence Payments (April 2022), the 8th lowest rate among the Key Neighbourhoods. An estimated 20.1 per cent of the population are aged 0-15, which is about average within Surrey.

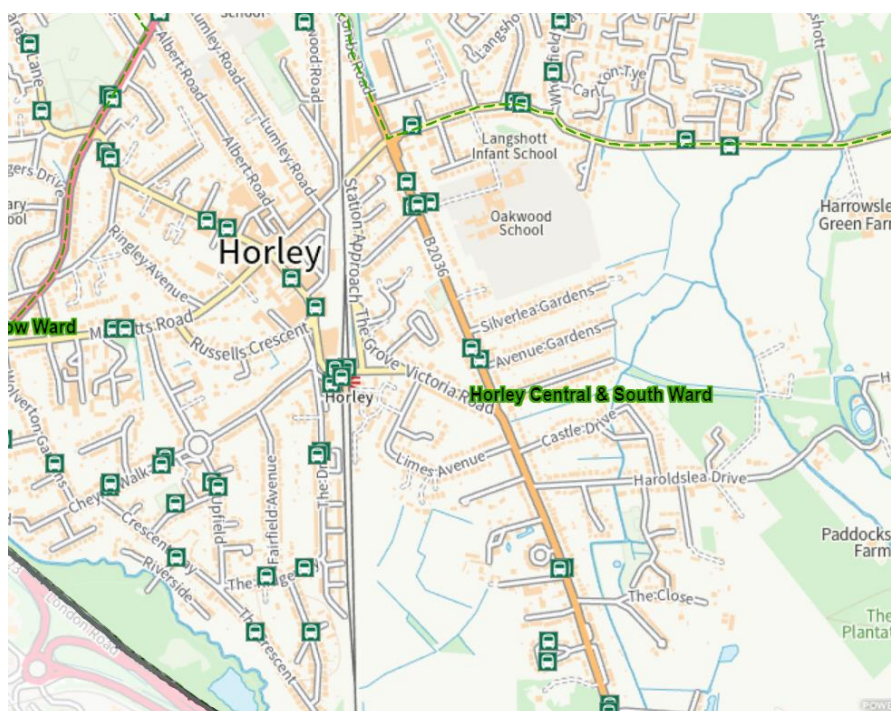
According to 2011 census figures, across the wider ward, 16.2 per cent of the population is non-white, with around 10 per cent made up of Asian ethnic groups. 21.6 per cent of households do not own a car, which is +8.5 per cent the Surrey average. As of May 2022, the ward has the 11th highest number of single parent households claiming Universal Credit, a total of 200 households.

In terms of the local transport context, this Key Neighbourhood is also served by a large variety of bus services that have routes on London Road, a main artery into Redhill, as well as services from central Redhill. As Redhill West and Wray Common is also located centrally, it is nearby to Redhill train station. The **Metrobus 460** and **Metrobus 480** connect to Epsom General Hospital. **The Metrobus 100** service connects to Gatwick airport.

Horley Central and South (Reigate and Banstead)

This Key Neighbourhood contains or is in proximity to the **Metrobus 100** service running daily at 15-minute intervals with proposals to reduce the evening and night services, the **Metrobus 400** service, currently running daily at hourly intervals, with plans to withdraw the Sunday service, and the **Metrobus 460** service, running daily at hourly intervals, with proposals to reduce evening and Sunday services.

Map of Horley Central and South



The ward of Redhill West and Wray Common contains the 13th most deprived LSOA area in the entirety of Surrey (Reigate and Banstead 018D), according to IMD statistics. The rate of the population receiving unemployment benefit (July 2022) in this specific area is 3.2 per cent, which is about 1 per cent above average for Surrey. As an indicator of disability, 10.2 per cent of the working age population receive Personal Independence Payments (April 2022), the 5th highest rate among the Key Neighbourhoods. An estimated 17.8 per cent of the population are aged 0-15, which is about 2 per cent below average for Surrey.

According to 2011 census figures, across the wider ward, 8.63 per cent of the population is non-white, with around 4.5 per cent made up of Asian ethnic groups. 19.7 per cent of households do not own a car, which is +6.6 per cent the Surrey average. As of May 2022, the ward has the 7th highest number of single parent households claiming Universal Credit, a total of 218 households.

In terms of the local transport context, this Key Neighbourhood is also served by a large variety of bus services. This includes the Compass 26 service (Horley circular) and the Southdown 424/422 (Gatwick – Redhill). The area has good access to the train network from Horley train Station. The **Metrobus 460** connects to Epsom General Hospital. **The Metrobus 100** service connects to Gatwick airport.

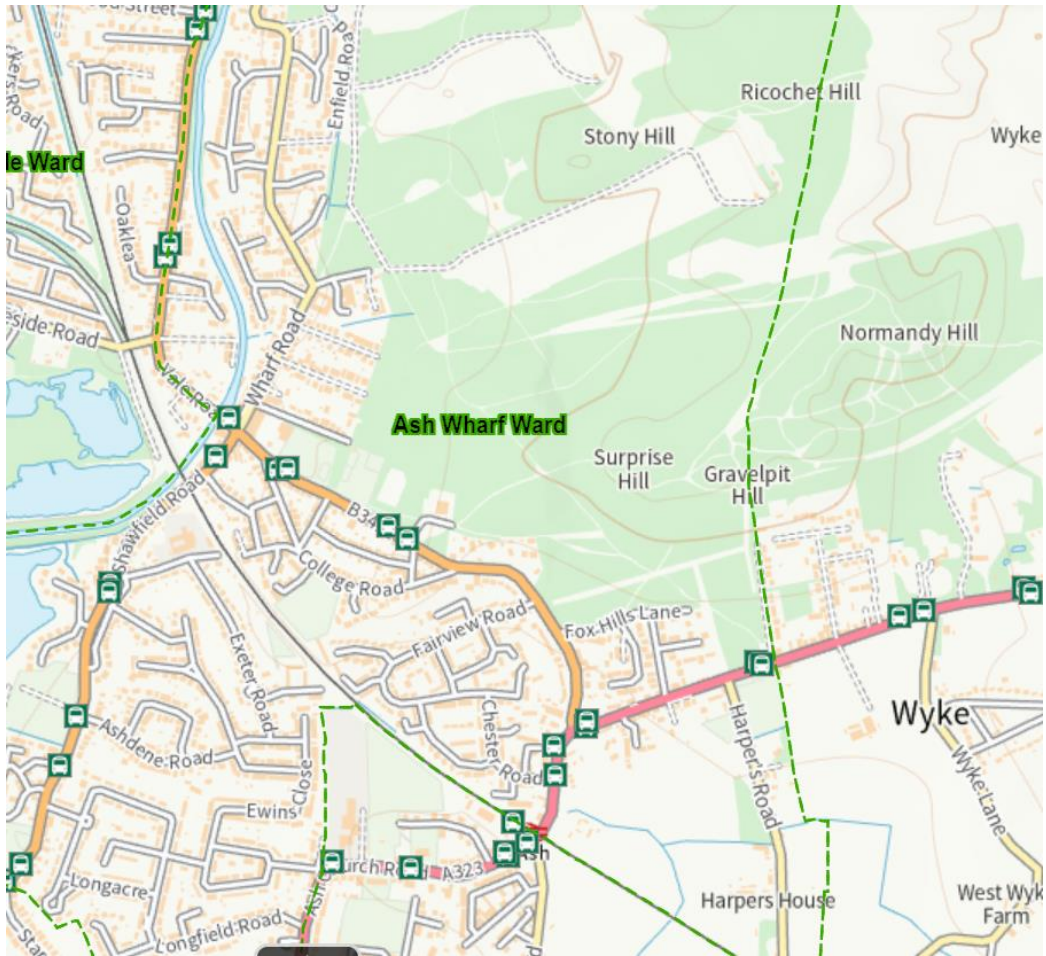
Ash Wharf (Guildford)

This service contains or is in proximity to the **Carlone 694** service. This is a school service that runs from Ash Wharf to Broadwater School.

The ward of Ash Wharf contains the 18th most deprived LSOA area in the entirety of Surrey (Reigate and Banstead 010E), according to IMD statistics. The rate of the population receiving unemployment benefit (July 2022) in this specific area is 3.1 per cent, which is about 1 per cent above average for Surrey. As an indicator of disability, 8.3 per cent of the working age population receive Personal Independence Payments (April 2022), which is mid-range among the Key Neighbourhoods. An estimated 21.8 per cent of the population are aged 0-15, which is about 2 per cent above average for Surrey.

According to 2011 census figures, across the wider ward, 5.3 per cent of the population is non-white, with around 2.5 per cent made up of Asian ethnic groups. 12.5 per cent of households do not own a car, which is -0.6 per cent the Surrey average. As of May 2022, the ward has the 79th highest number of single parent households claiming Universal Credit, a total of 85 households.

Map of Ash Wharf



SURREY COUNTY COUNCIL**CABINET****DATE:** 28 MARCH 2023**REPORT OF:** TIM OLIVER, LEADER OF THE COUNCIL**LEAD OFFICER:** LEIGH WHITEHOUSE, DEPUTY CHIEF EXECUTIVE AND EXECUTIVE DIRECTOR FOR RESOURCES**SUBJECT:** STRATEGIC INVESTMENT BOARD ANNUAL REPORT - FINANCIAL YEAR 2021/22 WITH 2022/23 MID YEAR UPDATE**ORGANISATION STRATEGY PRIORITY AREA:** GROWING A SUSTAINABLE ECONOMY SO EVERYONE CAN BENEFIT / TACKLING HEALTH INEQUALITY/ENABLING A GREENER FUTURE/EMPOWERING COMMUNITIES

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Purpose of the Report:

As part of its strategy to innovate in developing new models of delivery and to benefit from the freedoms introduced by the Localism Act, Surrey County Council had made investments and created trading companies to deliver income and efficiencies and in doing so has established a Strategic Investment Board, which reports annually to the Council. The purpose of the Board was to safeguard the Council's interest as shareholder and to take decisions in matters that required the approval of the Council as owner of a company.

The report was considered by the Strategic Investment Board at its meeting of 13 February 2023.

Recommendations:

It is recommended that Cabinet:

1. Endorse the Annual Report of the Strategic Investment Board.

Reason for Recommendations:

- To inform the Council about the activities of the Strategic Investment Board
- The Strategic Investment Board has been established in accordance with best practice governance to ensure effective oversight and alignment with the strategic objectives and values of the Council.

Executive Summary:

1. The Strategic Investment Board was created in June 2019 following the combining of the Shareholder Board and the Investment Board. The Shareholder Board and the Investment Board were created following the report to Cabinet in March 2013 outlining the Council's strategic approach to innovation and evaluating new models of delivery. It has been established in accordance with best practice governance principles to ensure effective over-sight and alignment with the strategic objectives and values of the Council. The Board's responsibilities and powers include:
 - approval of annual business plans; and

- reviewing the financial and overall performance of trading companies; and
 - appointing and removing directors.
2. The Strategic Investment Board is comprised of four members of the Council's Cabinet and is supported by senior officers of the Council, including the Section 151 Officer (Executive Director of Resources) and the Monitoring Officer (Director of Law & Governance).
 3. The Board works in accordance with its Terms of Reference which are reviewed on an annual basis.
 4. Meetings are scheduled to take place on monthly basis.

Consultation:

5. The Strategic Investment Board considered the Mid-Year Report at their meeting of 13 February 2023.

Risk Management and Implications:

6. Effective risk management is a vital part of the Council's approach to innovation and establishing new models for service delivery and to generate income. The Strategic Investment Board provides the governance to ensure that risks are effectively managed.

Financial and Value for Money Implications:

7. Effective risk management is a vital part of the Council's approach to innovation and establishing new models for service delivery and to generate income. The Shareholder Board provides the governance to ensure that risks are effectively managed.

Section 151 Officer Commentary:

8. Although significant progress has been made to improve the Council's financial position, the financial environment remains challenging. The UK is experiencing the highest levels of inflation for decades, putting significant pressure on the cost of delivering our services. Coupled with continued increasing demand and fixed Government funding this requires an increased focus on financial management to ensure we can continue to deliver services within available funding. In addition to these immediate challenges, the medium-term financial outlook beyond 2022/23 remains uncertain. With no clarity on central government funding in the medium term, our working assumption is that financial resources will continue to be constrained, as they have been for the majority of the past decade. This places an onus on the Council to continue to consider issues of financial sustainability as a priority in order to ensure stable provision of services in the medium term.
9. As such, the Section 151 Officer notes that there are no direct financial implications arising from this report. The financial performance of the companies is detailed in the body of the report.

Legal Implications – Monitoring Officer:

10. There are no direct legal implications arising from this report. The legal basis for company ownership and oversight is explained in the body of the report.

Equalities and Diversity:

11. There are no direct equalities implications arising from this report.

Corporate Parenting/Looked After Children Implication:

12. There are no implications arising from this report.

Safeguarding Responsibilities for Vulnerable Children and Adults Implications:

13. There are no implications arising from this report.

Environmental Sustainability Implications:

14. There are no implications arising from this report.

Public Health Implications:

15. There are no implications arising from this report.

What Happens Next:

16. Cabinet is requested to endorse the annual report of the Strategic Investment Board.

Contact Officer:

Neil Jarvey, Strategic Finance Business Partner, Commercial, neil.jarvey@surreycc.gov.uk

Consulted:

Strategic Investment Board

Annexes:

Annex A – Annual Strategic Investment Board Report

Annex B- Annual Strategic Investment Board Report (Part 2 Annex)

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Strategic Investment Board Mid-Year Report

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Financial Year 2021/22 with mid-year update in
2022/23



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The Council has created trading companies and made investments to enhance the financial resilience of the Council



The Council's strategic framework for innovation and investment has supported the development of initiatives to enhance the financial resilience of the Council. The Strategic Investment Board (SIB) monitors the Council's trading activity and its investments in companies to ensure satisfactory performance and effective risk management. The financial returns delivered by trading and investment helps to ensure that we continue to deliver quality services to our residents.

The SIB provides effective over-sight ensuring alignment with the strategic objectives and values of the Council. The SIB safeguards the Council's interests and takes decisions in matters that require the approval of the Council as owner or as a shareholder of a company.

The mid-year report of the SIB provides an overview of the progress we have made in the year to deliver innovation in service delivery and in enhancing the financial resilience of the Council. The report also gives an update on the companies' full year performance for 2021/22 which were in part impacted by the now ended Covid-19 restrictions.



Tim Oliver

Leader of Surrey County Council

Purpose

The primary and most common purpose behind the creation of a Local Authority Trading Company (LATC) is to enable a Council to participate in commercial trading activities. Many local authorities have created a LATC for this purpose, with the most common reason given being in order to grow income to protect services.

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The decision to create a company or invest in shares is now taken by the SIB upon the basis of a business case. Like many other Councils, Surrey County Council (SCC) has created companies to trade and grow income; with profits generated for the Council available to support the delivery of the Council's Medium Term Financial Plan and enhance financial resilience. This is however not the only reason for the creation of a company or investment in shares.

Surrey Choices for example was set up to safeguard the provision of services to people with learning and physical disabilities. Cabinet likewise approved the creation of a Property Company to strengthen the Council's ability to invest in a diversified and balanced portfolio of assets in pursuit of its Investment Strategy. The investment in the UK Municipal Bonds Agency was made to give the Council an alternative source of finance at preferential rates. The establishment of a Recruitment Joint Venture, Connect2Surrey, will enable the Council to have flexibility and control of temporary and interim recruitment in a changing market to suit both the needs of the Council and of the workforce.

The Council has created companies and purchased shares in order to –

Deliver services, benefiting from efficiencies driven by operating in a commercial environment

Trade & generate income

Invest in assets to deliver an income

THE STRATEGIC INVESTMENT BOARD

Governance

- The SIB was created in June 2019 following the combining of the Shareholder Board and the Investment Board as noted in the 2018/19 report.
- The Board and its role are noted in the constitution of the Council.
- The Board works in accordance with its Terms of Reference which are reviewed on an annual basis.
- Meetings are scheduled to take place monthly.
- A review of the governance of the companies was conducted during 2021/22. The overarching findings were that the existing governance and reporting processes were sound and provided visibility of decision making and of performance.
- However, improvements were identified and have now been implemented. These include an increase in:
 - reporting and oversight by Members and scrutiny; safeguarding against conflicts of interest; communication between company and shareholder; formal Director training

The Strategic Investment Board is comprised of three members of the Council's Cabinet and is supported by senior officers of the Council, including the Section 151 Officer (Executive Director of Resources) and the Monitoring Officer (Director of Law & Governance).

Members

- Leader
- Deputy Leader and Cabinet Member for Corporate Support and Resources
- Cabinet Member for Economic Development and Property
- Cabinet Member for Transport and Infrastructure

Advisors

- Chief Executive
- Deputy Chief Executive (Section 151 Officer)
- Director of Law & Governance (Monitoring Officer)

The SIB is further supported by the Asset Strategy Board (ASB) and the Shareholder Investment Panel (SHIP). The roles of both the ASB and the SHIP are detailed on Page 7 of the report.

Strategic Investment Board & Decision-Making Process

The day-to-day operation of each company is the responsibility of the Directors (of each company) with the SIB being responsible for taking decisions on behalf of the Council where these are of a more strategic nature. The extent of this decision-making will depend upon the Council's shareholding and upon terms included in a company's Articles of Association (matters reserved for the Shareholder) and / or a Shareholders Agreement in relation to Joint Venture companies. The Articles of Association for the Council's wholly owned companies stipulate that the shareholder, that is the SIB on behalf of the Council, are required to approve or make decisions in relation to the following matters summarised in the table below.

<u>Decision</u>	<u>Rationale</u>
Changes to the Articles	Removes all controls
Appoint and remove Directors	To ensure that the company is appropriately managed and that there is satisfactory governance
Material change in the nature or scope of the business	To ensure companies only undertake activities for which approval has been given and to protect the Council's reputation
Purchase of shares or interest in another company. Acquisitions of any business or any shares.	Significant business decision which may involve further financial risk
Borrowing or the raising of finance (except from SCC). The creation of any security interest (except SCC)	To avoid taking on debt that undermines security for SCC debt (excluding de-minimis bank overdrafts) and to avoid incurring further financial risk
Issuing, withdrawal or buy back of shares	To maintain SCC ownership as originally intended

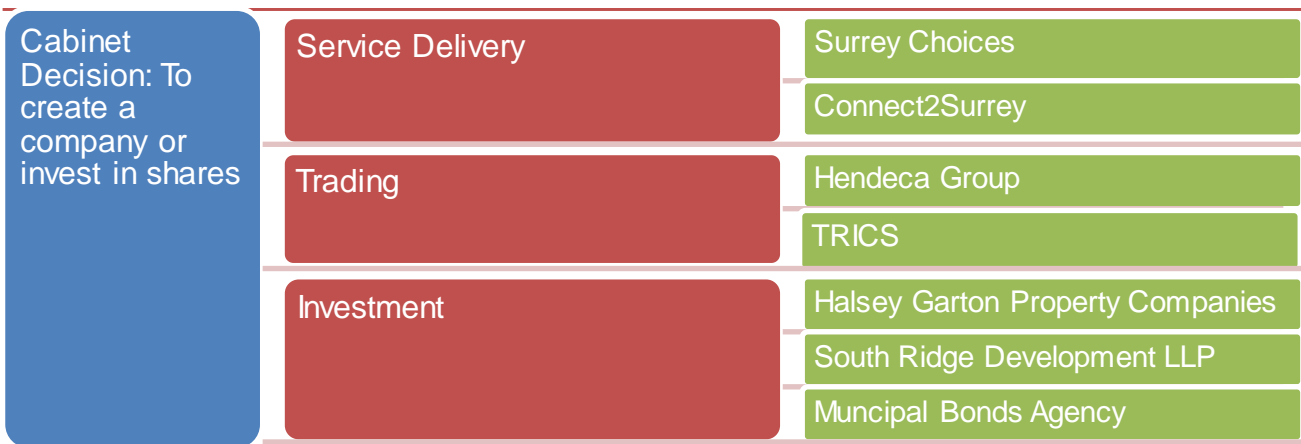
<u>Decision</u>	<u>Rationale</u>
Enter any Joint Venture, consortium or partnership	To ensure companies only undertake activities for which approval has been given in order to protect SCC reputation. To ensure that it is the shareholder that takes decisions that may involve substantial financial risk (rather than the Directors alone)
Selling, transferring, leasing, assigning property or assets (excluding de-minimis and replacement of operational equipment)	To avoid dilution of assets or security in relation to SCC debt
Disposal of any business or any shares	To maintain SCC ownership as originally intended
Entering into an administration order or steps to voluntarily wind up the company	To protect SCC's reputation

The SHIP, an Officer-led panel, chaired by the Director of Finance – Corporate Finance and Commercial (Deputy s151), works within delegated authority limits set by the SIB. The Panel's remit is to review and challenge the subsidiaries performance within year and assist with the approvals and operational workings of the respective companies. This enables approvals to be made in a timely manner so that operational effectiveness is not impacted by an elongated approval process. The SHIP also provides governance, as the client, for projects delivered by any of the subsidiaries and acts as the Senior Responsible Owner. Items that fall outside of the approval limits afforded to the SHIP will still be discussed and scrutinised by the Panel before coming forward to the SIB.

The ASB is a Council Member led Board, supported by Officers, which reviews and considers submissions from the Capital Programme Panel (CPP). The CPP's role is to oversee the Council's Capital Programme, considering asset plans, new projects, schemes and overall capital programme delivery. The ASB will monitor the performance of the subsidiary companies, with a particular focus on property related matters. Furthermore, the ASB will challenge to ensure any property related submissions made by the SHIP moving forward to the SIB for approval, are aligned to the strategies which has been approved by the SIB and Cabinet. Submissions received by the ASB from the CPP will move forward to Cabinet for approval.

THE COUNCIL'S SHAREHOLDINGS

The decision to create a company or to invest in shares is taken by Cabinet, or in accordance with delegated decision-making at the SIB. The decision is made upon the basis of a business case which articulates the financial implications and associated risks for the Council. These proposals are made with realistic and prudent expectations regarding the investment required and the length of time it will take to establish a successful company. The Council recognises that returns will not necessarily be received in the short-term but will contribute to financial resilience in the longer term and, may deliver wider benefits that may supersede financial returns.



Company	Ownership
Halsey Garton Property Ltd	100.0%
Halsey Garton Residential Ltd	100.0%
Surrey First Ltd	100.0%
Hendeca Group Ltd	100.0%
Surrey Choices Ltd	100.0%
Surrey and Kent Commercial Services LLP *	50.0%
South Ridge Developments LLP	50.0%
TRIC Consortium Ltd	16.7%
UK Municipal Bonds Agency	3.4%

* Trading as Connect2Surrey

The SIB provides oversight for LLPs in a similar way to companies limited by shares. Further information about LLPs is included in the glossary section.

The South Ridge Developments LLP is now closed therefore there is no further update for the company in the sections below.

Directors

Each company must have at least one person named as a Director – the Council itself cannot act in this capacity. The SHIP has delegated authority from the SIB for appointing (and removing) Directors to act on behalf of the Council. Directors have specific responsibilities in Company Law and

therefore the board or panel making the selection will need to ensure that persons with the appropriate skills are appointed. The name of the person(s) appointed to each company is noted in the next section of the report. In the case of Joint Ventures, the person appointed by the Council to act in respect of its shareholding is noted.

Since the last report the following Directors have been appointed:

Hendeca Group	• Neil Jarvey
Halsey Garton Property Investments	• Verity Royle, Bill Yardley
Halsey Garton Property	• Verity Royle
Halsey Garton Residential	• Verity Royle
Surrey Choices	• Riasat Khan
Connect2Surrey	• Mike Lea, Matt Johnson

These directors work alongside the other appointed directors, bringing their valuable experience to the board, and will be responsible for delivering the day-to-day activities of the company in accordance with the strategies and business plans agreed by the SIB.

As Directors, their role is not to provide scrutiny, but to be accountable to the SIB, alongside other directors, for the performance of the company and for their own performance as a Director. The SIB will continue to be the subject for scrutiny rather than individual directors.

Directors appointed by the Council receive no additional remuneration and undertake this role as part of their duties as an officer or member of the Council.

Funding

Changes to the Public Works Loan Board (PWLB) lending rules have stopped Councils taking on additional borrowing to invest purely for commercial gain. Unless seeking external funding, this limits the companies to work within the current envelope of investment that has been made to date,

or alternatively, make investments where commercial returns are of secondary benefit. Recent proposed powers as part of the draft Levelling Up & Regeneration Bill confirm the Government's

16 long-running concerns that a small number of authorities are taking on very high, disproportionate levels of debt or have become excessively exposed to risk from commercial investment strategies. The government continues to put in place controls to reduce this risk and any changes to future strategies need to be developed in compliance with the Prudential framework. The Council's revenue budget includes an element of income generating investment activity. The Capital, Investment & Treasury Management Strategy 2022/23 set out the extent to which expenditure plans are dependent on achieving the expected net income from investments over the lifecycle of the MTFs, to ensure proportionality. Investment activity is forecast to remain between 2-2.5% of the Council's net revenue budget over this period. Should we fail to achieve the expected return, the Council has earmarked reserves in place to manage one-off fluctuations in investment income achieved.

Company Details

The following pages contain information about each company, including a description of activities and purpose, Cabinet approval and date of incorporation and progress made to date. Financial information has been included where this is generally publicly available (e.g., from the statutory accounts of each company) or not commercially sensitive. However, information that is commercially sensitive, such as the future business plans, have been excluded.



Company Profile & Business Case

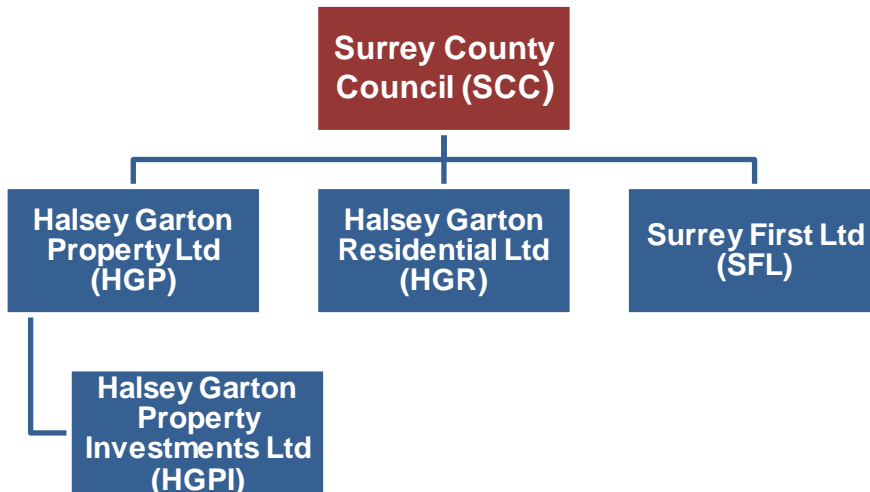
The Halsey Garton companies were incorporated in June 2014. The initial remit for the companies related to Halsey Garton Property Ltd which was incorporated to fully implement the recommendations of the Investment Strategy approved by Cabinet in July 2013 via Halsey Garton Property Investments Ltd. Halsey Garton Residential Ltd was dormant until August 2020 when it became active following the long lease purchase of 23 properties, now increased to 80. Surrey First (formerly Halsey Garton Property Developments Ltd) remains dormant.

The Halsey Garton companies are named after people associated with the history of Surrey County Council.

Halsey was the first Chairman of the Council (1893) and Garton was the High Sheriff of Surrey in 1913.

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Company Structure





Cabinet Approval	May 2014
Ownership	100%
Date of Incorporation	June 2014
	Commenced trade in November 2015
Council Investment	Share Capital £93m Loans of £234m
Return on Investment	2016/17 - 2018/19 the company proposed and paid dividends of £3.9m. 2019/20 - 2021/22 the company did not propose a dividend. Interest payments to the Council in 2021/22 of £14.3m (2020/21 £14.3m).
Directors	Nicola O'Connor (resigned June '22), Diane Wilding, Verity Royle, Bill Yardley

Council Investment

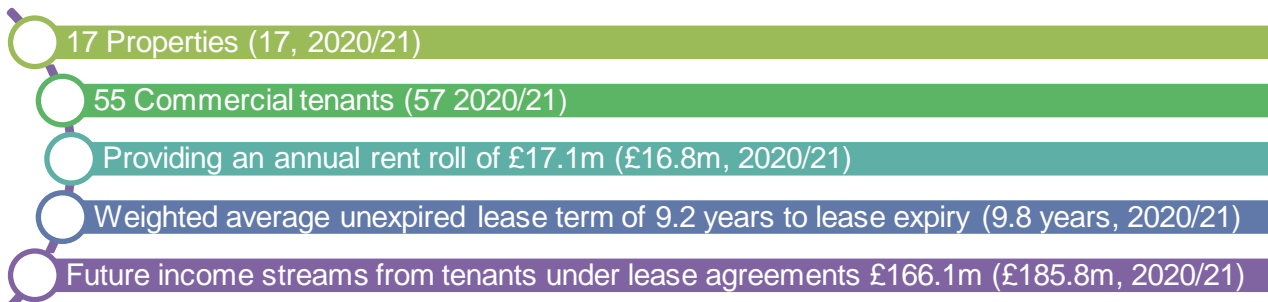
The strategy of the company was revised in 2019 with no further investment to take place outside of County borders. Therefore, the existing portfolio of 17 assets was to be managed and held to deliver ongoing revenue returns to the Council. The 2019 strategy was reviewed and re-approved by the SIB in February 2022, with a recommendation to employ a dedicated Managing Director to assist in shaping the strategy of the company going forward given the changes to market conditions and funding constraints in recent years. Following this recommendation Charles Maxlow-Tomlinson was appointed in April 2022 and is working with the Board to develop a future strategy proposal for consideration by the shareholder.

Changes to funding rules

The aforementioned PWLB funding rules changes, and those which may be made as part of the draft Levelling Up & Regeneration Bill, will need to be considered and factored into any future investment and the strategy of the Company going forward.

Progress Report

The company purchased its first asset in November 2015. The company owns investment assets with a value of £291m (£251m, 2020/21), with the following key indicators at 2021/22 year end.



The company did not propose a dividend in 2021/22 following the continued impact of the Covid-19 pandemic and general market uncertainty in the financial year.

The company delivered a pre-tax operating profit of £1,584k, well-above budget of £399k due to an increase in rental income and unrequired budgeted bad debt provision. Despite the market conditions, no significant new bad debt provisions were made in relation to arrears owed by tenants at year end.

Rent collection rates have continued to be strong following the Covid-19 closure period with 95% off all rents due in 2021/22 collected. The company continues to actively manage void units and the impact of tenants under CVA's (company voluntary arrangement's) within the portfolio. The company's property managing agents have stated the rent collections are an above average performance when compared to similar portfolios. The company is forecasted to be profitable before taxation for the year 2022/23, however, due to impact of the pandemic and general market trends, no dividend is anticipated to be paid from the 2022/23 trading year.



Halsey Garton
Residential Property Ltd

Cabinet Approval	May 2014
Ownership	100%
Date of Incorporation	June 2014
	Commenced trade in August 2020
Council Investment	Share Capital £4.1m Loans of £7.1m (as at 31 st March 2022)
Return on Investment	£Nil
Directors	Nicola O'Connor (resigned June '22), Diane Wilding, Verity Royle

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Council Investment

The Council has provided debt and equity funding for the purchase of 80 residential properties totalling £11.2m to date.

Progress Report

The company held 80 properties on long-term leases at the end of the financial year 2021/22. A small loss of £30k was made during 2020/21, representing 8 months of trading which included start-up costs. In 2021/22, the first full year of trading, the company made a pre-tax operating profit of £191k.

The company does not have any formal plans to purchase or develop any additional assets. Any future strategy decisions for the company will need to consider the current review on 'Right to Buy' legislation by the Government.

The forecast for 2022/23 is for the company to make a profit in line with prior year. While there continues to be high demand for the properties and an increase in revenue relating to a full year of holding the full portfolio; the company is still in the process of refurbishing and updating the properties.

Connect2Surrey

(legal name: Surrey and Kent Commercial Services LLP)

SIB Approval	July 2021
Ownership	50%
Date of Incorporation	September 2021
	Commenced trade in February 2022
Council Investment	Loans of £153k
Return on Investment	£Nil
Board Members	Mike Lea (SCC), Matt Johnson (Commercial Services Kent Ltd)

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Connect2Surrey

Council Investment

The Council has provided debt funding of £153k, together with a further £153k from Commercial Services Kent Ltd (CSKL), in order to invest in the start-up infrastructure required for a Temporary Resource Recruitment joint venture with CSKL.

Business Case

Previously Temporary Resource has been acquired through various Master Vendor agreements with large private sector companies.

It has been an ambition of SCC for some time to set up its own Temporary Resource solution but this was always hampered by lack of expertise, inadequate systems and cost of set up.

Following the expiration of the contract with Adecco in January 2022 SCC created a partnership with a neighbouring public sector organisation (Commercial Services Kent) in order to provide the best solution and key drivers for this were:

- To regain control of our agency worker spend.
- To have our own Agency which can work with hiring managers to understand what the requirements are and how they are changing in a challenging market.
- To have a more Surrey-focused solution in terms of 'what is best of SCC', rather than work with a large Master Vendor where we are competing with other Local Authorities.

- To shift the focus of the market into Surrey and increase the value to Surrey residents, both from a recruitment point of view (hiring Surrey residents, school & college leavers etc) and to improve the representation of Surrey based agencies.
- To improve the diversity of our workforce through working with local faith, charitable and disability-focused organisations to improve the hire rate in the temporary market and thereby provide a pipeline into permanent recruitment.
- To provide revenue streams for SCC through further commercial opportunities to offer services wider across the county to Surrey's businesses that have similar recruitment needs and challenges

Progress Report

The LLP has begun trading broadly in line with the business case submitted to the SIB, with regular reporting in place to both the SHIP and the SIB to provide updates on performance. The LLP has been impacted by the challenging recruitment market, especially the national shortage of social care workers. There has been considerable work to build the profile of the LLP within SCC. This has seen senior members from the Connect2 group being assigned to the start-up phase to help build relationships across the council. Working groups have been created with workforce teams in social care alongside HR to provide a holistic response to the market conditions. A specialist recruitment company with emphasis on attraction has been acquired by the Connect2 group and is focusing on attraction in the South East market. There have been some early shifts in the staff structure to provide further expertise in social care including. The 3rd party supply chain has been successfully migrated across from the previous Master Vendor supplier, and the company will submit extended first year accounts at the end of 2022/23 to Companies House. Connect2Surrey is working closely with hiring managers to further onboard specialist vendors into the Dynamic Purchasing System framework to make sure there is good coverage across all disciplines. It is increasing commercial opportunities and has signed-up another Surrey local authority.

Hendeca Group

Cabinet Approval	March 2013
Ownership	100%
Date of Incorporation	June 2013
	Commenced Trade in December 2013
Council Investment	£100 Share Capital
Return on Investment	The company has paid the following dividends:
	2014/15: £400,000 2015/16 £400,000
	2016/17: £440,000 2017/18 £400,000
	2018/19: £500,000 2019/20 £400,000
	2020/21: £200,000 2021/22 £340,000
Directors	Janine Lewis (resigned August '22), Lynne Hobbs, Neil Jarvey, Paul Forrester (resigned June '22), Steven Ruddy (resigned Nov '21), Jeffrey Harris (resigned May '21), Roger Childs (resigned May '21)

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Company Profile

Hendeca commenced trade in December 2013 following Cabinet approval as part of the New Models of Delivery strategy in March 2013. The company was known as S.E.Business Ltd, changing name to Hendeca Group Ltd during 2019/20. The company provides business to business (B2B) professional, technical, training and contingency services, enabling the Council to trade in those functions in which it has particular expertise and capacity.

Progress Report

In 2021/22 the company delivered pre-tax profits of £836k, which was significantly above those expected in the approved Annual Business Plan. These profits have been delivered in the main through the contracts held in the fire aviation contingency market. The company also delivered IT services to a private sector organisation operating in the health sector which has not been renewed. Further profit was delivered through the company's Training services which continue to expand. The dividend paid by the company for 2021/22 of £340k reflects the continued policy to retain some profit for investment into the company to assist with seeking new opportunities

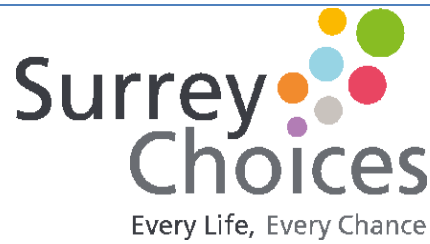
In 2022/23, Hendeca's focus has been to continue to remove the reliance on the contingency contract currently held. The company has financial security over the short to medium-term, which will allow continued investment into identified business opportunities to help deliver this aim.

The main business opportunities identified and currently being targeted are growth in the B2B training market, particularly in the field of fire safety in construction. Changes to the Health and Safety Regulations following the Grenfell Enquiry mean that Hendeca has a team of suitably qualified instructors to support focus in this target market. Ideally there will also be further expansion into the contingent services market.

The Training market compliments the skill set held within the company currently and is a service which is beginning to grow organically. To expediate this growth the company are exploring the feasibility of partnering with, or acquiring, other organisations.

Following the work undertaken to improve the branding and website of the company to take services to market, Hendeca now has an active social media presence on LinkedIn, Twitter, Instagram and Facebook. All of the team are encouraged to Like and Share on the various platforms and to contribute suitable copy in order to promote the company and its available services. The website is due to be further updated to make the full catalogue of training bookable online to improve the customer experience.

Hendeca employs staff as required to deliver confirmed contracts, and engages appropriate contractors, advisors and service providers to undertake the activities of the company. Where these are provided by SCC the Council makes an appropriate charge to the company, ensuring that the full cost of the activity is recovered.



Cabinet Approval	December 2013
Ownership	100%
Date of Incorporation	March 2014 Commenced Trade in August 2014
Council Investment	£100 Share Capital Loans of £2.8m
Return on Investment	
Directors	Jane Earl (Chair), Mette Le Jakobsen (Managing Director), Rachel Wigley, Stefan Nahajski (NEDs), Riasat Khan

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Surrey Choices

Company Profile

Surrey Choices Ltd commenced trade in August 2014, following Cabinet approval of the business case in December 2013. The company provides people with learning and physical disabilities and autistic people with a range of services in a variety of settings. The service offer includes day services and support for people who wish to seek employment or become engaged in work, volunteering, or training opportunities, as well as a short breaks service which supports family carers. In addition, the Shared Lives service matches carers who provide support in a family home environment to people with disabilities. The commissioning contract to supply services to the Council triggered the transfer of 246 employees from the Council to the company under TUPE regulations in August 2014, of whom 63 are still employed as of 31 August 2022. Today the company has a turnover of ca. £13m and employs ca. 300 people.

Progress Report

The company delivers services to the Council under a commissioning contract; this is currently primarily a block arrangement meaning that the risk of any volume increase rests with the company rather than with the Council, however the Short Breaks and Shared Lives services are now paid for on a spot basis. In the first 18 months of operation the Council increased the number of new referrals, and this led to a deteriorating financial situation for the company and losses for the first

two years of operation, however since then there has been a significant turn-around in the success of the company. Pre-tax profits of £397k were delivered in 2017/18, £734k in 2018/19, £658k in 2019/20, £343k in 2020/21, and £258k for the year to 31 March 2022 (all figures are quoted prior to the actuarial gain or loss on the defined benefit pension scheme). In addition, the company has made early loan payments, in 2022/23 and for the past two years, reducing the debt payable to Surrey County Council to £1.75m.

The current Executive Team has now been in post for 4-5 years and continues to make a significant and positive impact, building resilience with a strong and consistent senior management team and a strengthened company board which now includes two independent Non-Executive Directors. The board was joined earlier in the year by Cllr Riasat Khan following the resignation last year of Cllr Clare Curran.

The forward looking five-year strategic business plan for 2022/23 and beyond, approved by the Shareholder Board in 2019, was co-designed with the Council's ASC senior team. It continues to focus on delivering transformational shifts in service delivery and was jointly reviewed and re-indorsed in May 2022.

Surrey Choices is developing all its current portfolio of services, with a primary focus on community inclusion, the expansion and development of employment services, vocational opportunities and flexible community-based support. In addition Surrey Choices is also expanding the Shared Lives service, which is not only cost effective but delivers excellent outcomes for individuals and has won best UK Shared Lives Provider in the UK in 2022 for the second year in a row.

The company continues its focus on the Changing Days programme, which is developing inclusive models of support that enables people with disabilities and autistic people to develop independence, choice and control. As well as the change in operating model towards more person-centred support, the Changing Days programme seeks to reduce reliance on commissioned transport and to end segregated day care centres in favour of community hubs which are integrated within local communities. To date, this has led to a reduction in the footprint occupied of 25% with an overall target reduction of 50%.

Recruitment and Vacancies

Recruitment and retention remain the greatest risk faced by the Company, alongside the care sector a whole, with a vacancy rate at the end of August 2022 of 15% (45.1 FTE). Significant resources continue to be invested in recruitment, including the addition of a Recruitment Co-ordinator to the HR team and an increase in the internal referral fee.

2022/23 Financial Forecast

The current forecast profit for 2022/23 has reduced from the 2021/22 surplus to £50k, £50k below the budgeted surplus, primarily due to the planned £1.25m efficiency savings, representing the year 2 total of the £3.5m 3-year savings programme, exacerbated by delays to achieving efficiency savings from changes to the property portfolio. During Q4 Surrey Choices is targeting the remaining large segregated older properties at The Knowle (Fairways), Lockwood, and Bletchingley.



Cabinet Approval	July 2014
Ownership	16.67%
Date of Incorporation	October 2014
	Commenced trade in January 2015
Council Investment	£37,500 Share Capital
Return on Investment	The company has provided the following dividends-
	2015: £81,347
	2016: £83,821
	2017: £80,219
	2018: £93,040
	2019: £90,291
	2020: £98,667
	2021: £96,179
	2022: to be declared
Surrey County Council Director	Mike Green

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TRICS

Company Profile

TRICS Consortium Ltd commenced trade in January 2015, following Cabinet approval in July 2014. The Company provides a service to the transport planning and property development customer community by providing access to a comprehensive database of travel patterns known as trip rates. Trip rate data is used by planning consultants in support of planning applications in order to demonstrate the impact of major developments on local traffic. The database is recognised in national planning policy and is widely used by the planning profession and its use has been given due weight by Inspectors at Planning Inquiries.

The company is a Joint Venture (JV) with five other local authorities, Dorset Council, East Sussex County Council, Hampshire County Council, Kent County Council, and West Sussex County Council. These Councils held the rights to the database under a long-standing partnership arrangement and therefore became the shareholders of the company. The company now owns all Intellectual Property Rights in relation to the database and the brand.

Business Case

The creation of the company ensures that the commercial activities of the consortium Councils is being undertaken in an appropriate manner and will enable the growth potential of the database into other territories to be fully exploited.

Council Investment

The Council, together with the other five local authority shareholders, invested equity funds to provide for working capital and set-up expenses. The funds provided were from balances held by the consortium, created from surpluses from previous activity.

Progress Report

The Company commenced trading on 1st January 2015 when it took over the operation of the database from the incumbent supplier. The company comprises of the Managing Director, recruited to deliver the day-to-day operation of the company, three employees that TUPE transferred from the previous supplier and two further employees recruited to support its recent growth. The company is benefiting from increased memberships with user activity on the increase particularly from the residential development sector. 2022 saw a further increase in members of 1% on 2021, which considering the impact of Covid upon businesses is higher than expected, membership numbers have risen each year since inception.

TRICS has now become a truly international company, with its Australasian Database being released in September 2018. The second phase of this region's database being released in September 2019, with the improved TRICS Surveys being added from this date. It is anticipated that TRICS-commissioned surveys can start within the region in 2023, as Covid has made undertaking surveys in these regions very difficult.

The company continues to deliver profits in excess of expectations and has distributed a dividend to its shareholders each year since its creation, thereby delivering a significant return on investment within a short timeframe.



MUNICIPAL BONDS AGENCY

Cabinet Approval	Decision taken under delegated approval in September 2015
Ownership	3.4%
Date of Incorporation	September 2014
Council Investment	£450,000 share capital

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Company Profile

The UK Municipal Bond Agency's (UKMBA) objective is to provide an alternative to the Public Works Loans Board (PWLB) as a cheaper source of borrowing for local authorities from the issuing of bonds. The agency, developed by the Local Government Association (LGA), raised equity funds from 56 Councils to provide for operating costs and capital against risks.

Business Case & Council Investment

The agency aims to provide access to all local authorities to raise external borrowing provided that they meet the criteria set, and at the time of SCC's investment, preferential terms were expected to be provided to those Councils that are also shareholders in the company. It is uncertain whether this commitment will stand in the future.

Progress Report

UKMBA distributed a framework agreement which set out the terms upon which local authorities will be able to borrow from them. Authorities were expected agree to a joint guarantee that would operate if a local authority defaulted on its part of a joint borrowing. Requirement to provide the guarantee has been removed, however an approval of a credit check to borrow is required.

The PWLB's reduction of its borrowing rates by 1% in 2020 introduced a new borrowing benchmark for local authorities and made the lending market more competitive. UKMBA sees market opportunities to issue bonds for councils inside the new PWLB rate and, therefore, continues to receive an increased interest from prospective borrowers. The LGA continues to financially support the agency.

The recent Bank of England base rate rise and the war in Ukraine have also impacted the financial markets. The sterling debt market has been affected with a sharp increase in volatility which contributed to the delays of the Company's planned pipeline of bond transactions in 2021. However, the demand for fixed income securities of various maturities remains strong and UKMBA expects to resume marketing its new bonds in the second quarter of 2022.

While interest remains from local authorities which could result in further bond issues, the lack of activity after the initial bond issue has led to the auditors of UKMBA to continue to state that there is material uncertainty related to going concern. As a result, SCC continue to carry the value of the investment at £nil. Should the performance of the company recover the investment value can be reinstated. However, the treatment adopted removes any future risk relating to the company for the Council.

GLOSSARY

Articles of Association

A company's Articles of Association set the rules (the constitution) for the company. The Articles are filed as part of the incorporation process and are publicly available documents. The objects of the company describe what the company will do. The objects of a company are now deemed to be unlimited, unless the Articles limit them.

The Articles may restrict the decision-making powers of the Directors – these are described as Reserved Matters. The Articles may be changed at any time by a special resolution of the members (the shareholders) of the company.

Companies created by the Council follow the model articles with the exception of the introduction of reserve powers in matters of strategic importance and one or two other minor exceptions.

Assets

A Council owned company may purchase assets from the Council. In disposing of assets, the Council must ensure that it receives appropriate market value and the company in turn will be required to purchase at market value in order to ensure that there is no financial subsidy or advantage that may be deemed as state aid.

The Council will retain property assets unless there is a financial advantage to transfer (for example, where the purpose of the trading company relates to property activities). Market rents will be charged for occupancy of property assets – rents are a pre-tax expense making this arrangement tax efficient and this also ensures that the Council's balance sheet remains strong and is not diluted.

Surrey Choices Ltd purchased operational assets, such as vehicles and musical equipment, at appropriate market values from the Council and this formed part of the initial set-up costs for the company.

Debt Financing

Debt financing provides the funds required to run a business. A company may borrow the money required to grow and develop the business.

Interest on debt is a business expense, and therefore deducted before tax.

Companies created by the Council, such as Hendeca Group and Surrey Choices have been set-up with limited equity funds. Funding for growth and working capital requirements has been provided by the Council under an agreed loan facility. The Council provides loans to enable Halsey Garton Property to buy investment assets.

GLOSSARY

Directors Duties

The SHIP are responsible for appointing (and removing) Directors to act on its behalf in relation to companies in which the Council holds shares. Directors duties are described in the Companies Act 2006 and include a responsibility to promote the success of the company, exercise independent judgement and exercise reasonable care, skill and diligence.

Directors appointed by the Shareholder Board do not receive additional remuneration for their role and are covered by indemnities provided by the Council in respect of financial loss (an extension of the indemnities provided by the Council to staff and members as agreed by Cabinet in March 2013). This does not and cannot extend to negligence, default, breach of duty or breach of trust.

The Council's legal team brief Directors so that they understand their duties.

Group Companies

Companies form a Group if one is a subsidiary of the other or both are subsidiaries of the same body corporate or each of them is controlled by the same person. Companies within a Group can take advantage of Group Tax relief. In tax legislation, the Council is a body corporate that can perform the link between LATCs and therefore the losses of one company can be offset against profits of another.

This group status in tax law also provides the Council with the ability to be exempt from stamp duty which would ordinarily apply to property transactions (including the entering into lease arrangements) between group companies).

The Council is required to produce Group Accounting statements which mean that the financial results of its LATC's will be included together with the financial results of the Council. The Council will continue to also produce detailed Annual Statements of Accounts on a single entity basis.

Joint Venture

A Joint Venture company is one that is owned by more than one shareholder, where the shareholders concerned are corporate bodies in their own right. The term Joint Venture is not one that is legally defined and is often used in respect of other arrangements that do not necessarily involve a limited company. For example, a Joint Venture may also be a Limited Liability Partnership or may be used to describe an arrangement between public bodies.

GLOSSARY

LATC (Local Authority Trading Company)

The terminology “LATC” is often used to describe a company that is owned by a Local Authority (i.e., Local Authority Trading Company). It is not a different form of company and most companies described as LATC’s are companies limited by shares, with the shares and therefore the company being wholly owned by the local authority.

Companies created by SCC are most likely to be limited by shares, as this structure ensures that profits can be returned to the shareholder (the Council) in the form of dividend payments and provide the possibility for future sale. It is the most suitable structure for trading activity and enables the Council to create a tax group.

It is possible that other company structures may be applicable in certain circumstances; however, these structures tend to involve the removal of Council control or would mean an inability to return profits-examples are companies that are limited by guarantee.

Limited Liability Partnership (LLP)

A Limited Liability Partnership is an alternative legal structure that is similar to a traditional partnership (e.g., as used by a firm of solicitors) but it limits financial risk whilst still being able to benefit from flexibility of structure, tax, profit distribution and the rights and duties of the partners. A partner of an LLP is called a member and is similar to a degree to a shareholder. A partnership agreement will usually be put in place to set out the rights, responsibilities and liabilities of each member and will specify the way in which the LLP will be managed.

LLPs do not have to pay Corporation Tax – it is “transparent” for tax. This means that each member is taxed in accordance with its own tax status. This is beneficial for the Council as it means that Corporation Tax is not payable on its share of the profits. A LLP however can only be set-up by a Council in certain circumstances and cannot be established where the purpose of the LLP is purely to trade or deliver an income.

An LLP is permissible for the creation of the “JV” with Places for People since this entity is being established for the purpose of creating a model to deliver benefits to residents from the development of housing and mixed used schemes utilising the Council’s vacant sites. As this is an activity that the Council can undertake in its own right (rather than requiring a company to be set-up) a LLP is an appropriate structure.

GLOSSARY

Reserved Matters

Reserved matters are important decisions for which the Directors are required to seek and gain Shareholder Approval. These decisions are written in the Company's articles of association which set the constitution or the rules for the running of the company.

The Shareholder Board has delegated authority to perform these functions on behalf of the Council. The reserved matters of SCC's companies have been written to ensure that the Shareholder Board is responsible for consideration of issues of strategic importance, take decisions that may involve changes to financial risks or may have an impact on the Council's reputation.

Share Capital (Equity)

Equity or shares in a company represent the ownership interests. The Equity invested is the amount of funds contributed by the owners to the financial requirements of the company. In a limited liability company, the owners / shareholders lose no more than the amount invested. Equity invested at start-up is evaluated on the basis of assets owned and/or earnings potential.

Financial returns to the shareholders are made in the form of dividend payments. Dividends are not a business expense and are paid from post-tax profits

Shareholders

The Shareholders (the owners of a company) and directors have different roles in a company. The Shareholders own the company and the directors manage it. The Directors must obtain shareholder approval for decisions where the shareholder has restricted the powers of the Directors – these are called reserved matters. The Shareholder Board has delegated authority to perform these functions on behalf of the Council.

Shareholders Agreement

These are agreements between shareholders which are private documents. These agreements set out how the shareholders interact with each other and can define what happens in the event of dispute. A shareholder agreement is only relevant when there is more than one shareholder and is recommended practice for Joint Ventures.

SCC has entered into a shareholder agreement for TRICS Consortium Ltd and in relation to the investment in FutureGov Ltd (in this instance it is called an Investment Agreement but is essentially the same thing).

GLOSSARY

Support Services

The 2003 Local Government Act provides the ability for the Council to enter into agreements for the supply of goods and services, by and to a LATC. The supply of goods, services and financial assistance must be made without subsidy. The legislation guides the Council to apply CIPFA definitions of total cost in calculating the cost of supplies made to a Trading company. This provides the ability to recover all costs in the organisation, including a proportion of all central overheads, depreciation, capital costs and pension back-funding. This wide definition allows significant overhead recovery in the provision of services to an LATC. The supply of goods and services calculated on this basis will be compliant with state aid legislation.

The arrangements for LATCs should seek to ensure that the overall cost base of the Group is not unnecessarily duplicated or increased as a result of any new arrangements. Therefore, SCC will provide services to an LATC where it is in a position to do so, where these services are fit for purpose for the business and support its strategy and can be supplied at a cost that is competitive. This is particularly important from a Group perspective where costs are relatively fixed, for example in the provision of payroll services where a substantial portion of the cost relates to the system.

TUPE

The Transfer of Undertakings (Protection of Employment) Regulations 2006 (TUPE) protects employees when a business changes to a new owner and apply to “relevant transfers” which may occur in many situations, including service provision or contract changes. In these situations, the employment transfers, employment terms and conditions transfer, and continuity of employment is maintained.

The new employer is therefore required to provide the same terms and conditions to the staff concerned. Alternate provision can be made, e.g., a cash alternative to a lease car, but this alternate provision must be acceptable to the employee.

SCC is required to follow the provisions of the TUPE act. This will apply where a service is being transferred to a trading company, as occurred with the award of the commissioning contract for services to Surrey Choices. A LATC will additionally be required to follow TUPE provisions when taking over a service contract from another supplier – for example, as in the case for Hendeca Group in the provision of IT managed services previously supplied to the customer by another provider.

GLOSSARY

Teckal

Procurement complications arise where the Local Authority creates a company to supply services that the LA wishes to continue to purchase – be those that were previously in-house or previously provided externally. The Council is not permitted to automatically purchase from a LATC company outside of normal EU procurement rules. The LATC is required to tender alongside other private sector suppliers.

Procurement issues in relation to the purchase of goods and services from a LATC were evaluated in the Teckal case. According to the 1999 Teckal judgement, public procurement rules do not apply to contracts if the control exercised by the contracting authority over the entity awarded the contract is similar to that which it exercises over its own departments and, if at the same time that entity carries out the essential part of its activities with the controlling authority. This judgement has now been codified into a new EU Directive and in UK Law by the Public Contract Regulations 2015.

SCC will need to ensure that arrangements comply when considering transferring activities to a trading company, assuming that the Council wishes to continue to purchase the services. The arrangements for Surrey Choices comply with these considerations.

A LATC falling within the Teckal exemptions will itself be required to comply with the EU public procurement rules, and therefore Surrey Choices is subject these procurement regulations.

Transfer Pricing / State Aid

Transfer Pricing refers to the price at which divisions of a company or a group of companies transact with each other – the terminology relates to all aspects of inter-company financial arrangements. These arrangements have potential implications for the tax authorities since they can be used by multi-national corporations to move profits to countries with lower taxes. The UK has adopted principles of “arm’s length” in tax laws.

State Aid issues would apply where a LATC is established or provided with goods and services and financial assistance at a subsidy.

SCC will need to ensure that it steers an appropriate path or middle ground between issues of transfer pricing (in relation to tax) and those in relation to State Aid. The cost of goods and services and financial assistance (e.g., loans) supplied by the Council to an LATC will therefore be tested against the market to ensure that prices / rates can be justified on an arm’s length basis.

SURREY COUNTY COUNCIL**CABINET****DATE: 28 MARCH 2023**

REPORT OF CABINET MEMBER: DENISE TURNER-STEWART, DEPUTY LEADER AND CABINET MEMBER FOR COMMUNITIES AND COMMUNITY SAFETY

LEAD OFFICER: MARIE SNELLING, EXECUTIVE DIRECTOR CUSTOMER AND COMMUNITIES

SUBJECT: YOUR FUND SURREY- CF118 MASTER PARK COMMUNITY PAVILION

ORGANISATION STRATEGY PRIORITY AREA: EMPOWERING COMMUNITIES

17

Purpose of the Report:

This report sets out the key information on the **Master Park Community Pavilion** Your Fund Surrey (YFS) application, for the consideration of Cabinet.

The vision of YFS is to bring community-led and place-making projects to life, with a focus on the wider community benefit that leaves a real legacy.

Recommendations:

It is recommended that Cabinet:

1. Agree to fund Master Park Pavilion Charity for the full amount requested of £1,860,000 towards the creation of the Master Park Community Pavilion.
2. Recommend the applicant provides evidence to confirm full funding is in place before funding is released.

Reason for Recommendations:

This application has been the subject of a rigorous assessment process and officers consider the project meets the aims and published criteria of the Fund and to satisfy the requirements to award funding.

The new pavilion will create a new hub in the centre of the busy town, providing opportunities and facilities for the whole community.

Executive Summary:

1. Master Park Pavilion is a single storey building situated within the eleven acres of Master Park, Oxted in Tandridge. Master Park is in the heart of Oxted where the community gather for sport, to utilise the playground or just relax. The park hosts many events and fairs throughout the year for the benefit of the local community and charities. The applying

organisation, Master Park Pavilion Charity (MPPC), own the building and land outright. The area ranks 292 out of 709 in Surrey, where first is the most deprived area.

2. The area is bordered by three areas of greater deprivation located in the Divisions of Limpsfield and Oxted North and Tandridge which the new facility will serve. Oxted Secondary School has a wide catchment area including Hurst Green, Godstone, Tatsfield and Lingfield. Hurst Green has been identified by Surrey County Council and Tandridge District Council as the key neighbourhood for Tandridge.
3. The application is for £1,860,00, equating to 63% of the overall project costs. As well as from sports clubs, the project has received considerable financial support from Tandridge District Council (£500k CIL) and Oxted Parish Council (£90k). The funding gap of c£440k is to be filled via a mixture of fundraising and corporate donations. A detailed fundraising strategy is in place and MPPC are confident that the amount can be achieved within 6-12 months as they have an existing track record and firm commitments from several individuals.
4. The existing Master Park Pavilion is primarily used by Oxted & Limpsfield Cricket Club (OLCC) and Oxted & District Football Club (ODFC) and has reached the end of its life. The proposed project entails the demolition of the existing pavilion and the construction of a new fit-for-purpose two-storey community hub and sports pavilion.
5. The new building will support the incumbent sports clubs as well as providing facilities for new sports clubs and wider community use. The building will increase from 218m sq. to 677m sq. but will utilise the same footprint to ensure there is no encroachment on the green space.
6. The ground floor will consist of a café, large clubroom, a bar, kitchen, public & disabled toilets with baby changing facilities. In addition, four gender-neutral changing rooms & showers will be provided. The upper floor will be a large flexible room which can be converted into two smaller rooms.
7. A key element is the partnership with seven local charities and organisations, their 'Pay It Forward Partners', whose work supports Surrey County Council's Health and Wellbeing Strategy. Each of the organisations will benefit from free and preferential access to the new community spaces and include charities that support people with learning disabilities, mental health issues, dementia and Parkinson's. Their partners also include the Primary Care Network, who will use the space to deliver services at a local level, and a Community Fridge. There is currently no community fridge provision in Tandridge south of the M25.
8. The proposed café area will serve park and pavilion users and will be outsourced to a 3rd party. The bar area will continue to be run by the cricket and football clubs.
9. A proposed usage plan for each of the rooms has been provided, based on the organisations and groups that have requested first refusal for space. The number of hours available for community groups has increased to 225 hours per week, with a minimum of thirty hours a week ringfenced for 'Pay it Forward' partners. The proposed rental prices are in line with other community pavilions and halls across the south of England.

10. The new pavilion has been designed to be sustainable. Included within the new pavilion, but not limited to, will be an Air Source Heat Pump, LED lighting, a rainwater harvesting system and photovoltaic panels.

Description of project benefits

11. The benefits to the project include:

- A new community space with opportunities to enhance social interaction and support wider health and wellbeing.
- Builds on the 100 year legacy of Master Park Charity
- Increased capacity for new and existing sporting clubs
- Improved energy efficiency and reduced ongoing running costs.
- Opportunity for small businesses to thrive by utilising the pavilion.
- Provides a space for educational collaboration with Oxted School
- Provides a dedicated and safe space for organisations working with vulnerable people in Oxted.
- Enhanced community spirit through delivering a space for the whole community to be part of, fundraise for and be proud of.

Project Timeframes and Management

12. The project will take approximately 12 months to complete. Planning permission has been granted and the new building will have an expected minimum life expectancy of 50 years.

13. A Pavilion Operations Committee (POC) will have overall responsibility for Management, maintenance and finance of the facility. It will report to the Master Park Management Committee (MPMC), an existing group of over 60 years. The composition of the POC will include representatives of MPMC, the sports clubs and other regular user groups of the building.

Consultation:

Summary of Support

14. Have your say, which featured the Master Park Community Pavilion, received 1184 comments, almost 100% of which were positive. Letters of support have also been received from a wide range of groups and individuals.

15. The Divisional Councillor Cameron McIntosh commented as follows:

'I am hugely supportive of this project and the benefits that the creation of a community, park hub will bring to the Oxted area. Not only Oxted, but the wider surrounding area including Hurst Green, Limpsfield and Tandridge Village. I am particularly enthusiastic about the projects' aim to create a community fridge/food bank option, a service that is limited south of the M25 in the Tandridge area and one that is much needed to support vulnerable groups across the south of the district. The location makes this a viable project in my view, situated in the busy centre of Oxted town, easily accessible by transport links including train and bus. The wide range of services that this newly developed 'hub' will offer, situated in one of the busiest towns in the district, accessible and reaching the many surrounding communities of Tandridge makes this a viable project to be considered for YFS funding'.

Risk Management and Implications:

16. The risks to YFS funding were noted by the Advisory Panel as:

- Full project funding not realised.
- Unable to source a café provider or café proves unviable.
- Project costs rise.
- Lack of community use in new building.
- Weak management committee and lack of volunteers
- MPPC sell the venue.

17. It was felt that there were adequate controls in place for the level of risk including:

- MPPC having a clear fundraising plan in place. There is also evidence of recent community fundraising, securing the future of two community buildings in Oxted.
- There has been considerable interest in the café from both successful cafes operating in nearby parks and other local businesses.
- Confirmed interest from several community groups, sports clubs and local residents.
- An established management group who have been running Master Park for a number of years
- SCC would include a condition in the funding agreement that the venue is not to be sold / must be used for community use for a set number of years.

Financial and Value for Money Implications:

18. The application is for £1,860,00, equating to 63% of the overall project costs. YFS funding is requested for the construction of the superstructure, internal walls and all mechanical and electrical services. Table 1. outlines the Financial Summary and table 2 details the total project cost breakdown.

Table 1. Financial summary

Amount applied for:	£1,860,000
Total project cost:	£2,956,231
Percentage of cost against total:	63%
Have other funding sources been secured?	Yes
Other funding:	<p>Actual</p> <p>Oxted and Limpsfield Community Sport Association - £59,683</p> <p>Local business donations - £6,500</p> <p>Oxted Parish Council CIL - £90,000</p> <p>Individual donation - £615</p> <p>Tandridge District Council CIL - £500,000</p> <p>Fundraising Strategy 2023-24</p> <p>Individual donations - £160,000</p> <p>Local business donations - £100,000</p> <p>Fundraising events - £75,000</p>

	Loans and late funders - £104,433
Is there a commercial element to the project?	Yes
Amount suggested for funding:	£1,860,000

Table 2. Project Cost breakdown:

Activity	Total Cost (inc. VAT)
Professional fees – pre & post planning / tender and construction phase (cost partially incurred)	£180,231
Site clearance & sub structure construction	£340,000
Superstructure	£960,000*
Mechanical and electrical services	£610,000*
Internal walls	£290,000*
Internal finishings	£150,000
External works	£130,000
Furnishings, lighting, fittings and storage	£110,000
Publicity – CGI video, brochures, leaflets and events	£16,000
Evaluation	£5,000
Sub total	£2,791,231
Contingency	£165,000
Total	£2,956,231

*Denotes YFS funded element

19. As with all applications, there is a risk that construction and purchase costs will increase between application and approval. This is partially mitigated by a contingency allocation included in the funding amount. We would aim to work with the applicant to value engineer the project where necessary to come in within budget.
20. MPPC are currently subject to normal rate VAT. The group believe they have a case to be zero rated as it is a community building and have been in conversations with HMRC for over a year. As part of the funding agreement, any VAT recoverable at a future date would need to be repaid to Surrey County Council.

Advisory Panel Comments

21. The applicant presented the project to the Advisory Panel on 1st March 2023. Members of the Advisory Panel raised a range of questions for the applicant, including details of the green elements of the project, how they were planning to raise the outstanding balance, the basis of their long-term income projections, their links with Oxted Secondary School and regarding their VAT status.
22. Members of the Advisory Panel were satisfied by the answers provided and universally recommended the project for funding. They concluded that the project demonstrated considerable community support, would leave a significant legacy in the area and supported the east of the County.

Financial Implications

23. The finance and commercial assessment have been completed, along with a summary of risk and mitigations set out in paragraph 16. These factors set out alongside the expected benefits of the project have been scrutinised and challenged by officers and are deemed acceptable in this instance. An important consideration is that Your Fund Surrey is a key part of the Council's Empowering Community approach focused upon enabling communities through investing in a meaningful and lasting way. Therefore, the success of Your Fund Surrey will set against establishing a different relationship with communities, empowering them to be more self-reliant. In forging that relationship, the success of individual projects will vary within the benefits delivered by the programme as a whole. Learning points from successful and unsuccessful projects will be taken and used to inform the development and evolution of the fund over time.
24. The borrowing costs associated with the fund have been fully built into the Council's Medium-Term Financial Strategy. The annual cost of borrowing for this specific project of £1,860,000 would be £94k.
25. Following the financial and commercial review this project has three outstanding risks identified. The first being that the VAT position for the expenditure has not been fully determined. The project financials have been constructed on a worst case scenario basis, but this creates the second issue which is a significant shortfall in funding that has yet to be identified. Should the VAT issue be resolved favourably, this will also resolve the funding issue. However, if VAT remains payable, the project has not yet secured enough funds to cover its requirements.
26. The third issue relates to the long term forecasts for running the operation. These are optimistic with marked increases expected in income levels. This risk will be managed through careful control of planned expenditure, which would require managed reductions if needed to offset income reductions.

Section 151 Officer Commentary:

27. Although significant progress has been made to improve the Council's financial position, the financial environment remains challenging. The UK is experiencing the highest levels of inflation for decades, putting significant pressure on the cost of delivering our services. Coupled with continued increasing demand and fixed Government funding this requires an increased focus on financial management to ensure we can continue to deliver services within available funding. In addition to these immediate challenges, the medium-term financial outlook beyond 2022/23 remains uncertain. With no clarity on central government funding in the medium term, our working assumption is that financial resources will continue to be constrained, as they have been for the majority of the past decade. This places an onus on the Council to continue to consider issues of financial sustainability as a priority in order to ensure stable provision of services in the medium term.
28. The long-term sustainability of the projects funded by Your Fund Surrey is a key factor in assessing their suitability. The ongoing sustainability of this project will require close management of income and expenditure. The S151 Officer concurs with the recommendations in this report.

Legal Implications – Monitoring Officer:

29. The report sets out the information and steps for the consideration of the application further to the Council’s governance arrangements for Your Fund Surrey.
30. Further to those arrangements, if approved, the Council and the organisation will enter into a comprehensive funding agreement which will include the performance measures that will be put in place to ensure the funding is used as intended as well as clearly describing any support or additional conditions agreed as part of the funding award.

Equalities and Diversity:

31. Your Fund is designed to provide investment in schemes that encourage community participation, reduce isolation, and develop the potential for social wellbeing and economic prosperity. As such it is anticipated that this project will have a positive impact on a number of those who may rely on or gain support from within the local community and those within protected characteristics that may be more likely to experience social and economic exclusion.
32. An Equalities Impact Assessment has been produced for YFS and was circulated as an Annex to the YFS Cabinet Report 26th January 2021.

Other Implications:

33. The potential implications for the following council priorities and policy areas have been considered. Where the impact is potentially significant a summary of the issues is set out in detail in Table 4 below.

Table 4. Implications for council priorities and policy areas

Area assessed:	Direct Implications:
Corporate Parenting/Looked After Children	No direct implications
Safeguarding responsibilities for vulnerable children & adults	Safeguarding policy in place and made available to all hires of the hall. Provides a space for local charities and groups to safely deliver activities for vulnerable people.
Environmental sustainability	<ul style="list-style-type: none"> • Underfloor heating utilising air source heat pumps • All lighting low voltage LEDs • Rainwater harvesting to water sports pitches. • Installation of electric car charging points • Installation of photovoltaic panels on roof.
Public Health	The project has a positive impact on wider health outcomes, users of the pavilion will be able to take part in a varied range of activities/classes that benefit not only physical but mental health.

What Happens Next:

- Following Cabinet approval of the funding a notice of the records of decisions taken under delegated power, will be published within 3 days of the decision being made.

- Officers will prepare the relevant schedules and funding agreements to enable payment of funds and monitoring and evaluation of the project against its outcomes.
 - The YFS Team officers will issue a provisional offer of funding to the applicant, including a copy of the draft Funding Agreement
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Report Author:

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Consulted:

Division County Councillor

Portfolio holder for Communities

Resources, Corporate Finance & Commercial – Surrey County Council

Sources/background papers:

Your Fund Surrey Criteria

Your Fund Surrey Governance Document

SURREY COUNTY COUNCIL

CABINET

DATE: 28 MARCH 2023



REPORT OF: DAVID LEWIS, CABINET MEMBER FOR FINANCE AND RESOURCES

LEAD OFFICER: LEIGH WHITEHOUSE, DEPUTY CHIEF EXECUTIVE AND EXECUTIVE DIRECTOR FOR RESOURCES (S151 OFFICER)

SUBJECT: 2022/23 MONTH 10 (JANUARY) FINANCIAL REPORT & 2023/24 FEES AND CHARGES REVIEW

ORGANISATION STRATEGY PRIORITY AREA: GROWING A SUSTAINABLE ECONOMY SO EVERYONE CAN BENEFIT/TACKLING HEALTH INEQUALITY/ENABLING A GREENER FUTURE/EMPOWERING COMMUNITIES

Purpose of the Report:

This report provides details of the County Council's 2022/23 financial position as at 31st January 2023 (M10) for revenue and capital budgets and the expected outlook for the remainder of the financial year. It also outlines the outcomes from an extensive review of 2023/24 Fees & Charges.

Key Messages:**Revenue**

- **At M10, the Council is forecasting a full year deficit of £2.4m**, against the approved revenue budget, an improvement of £3.4m since M9. The details are shown in Annex 1 and summarised in Table 1.
- Without action, the position would be an overspend of £31.6m. Budget Recovery Plans of £12.2m and utilisation of £17m of the corporate contingency reduces the overall level of forecast overspend to £2.4m. The utilisation of the contingency recognises the deterioration of the financial environment since the budget was set in February 2022, due primarily to high levels of inflation combined with considerable increases in demand for key services. It has also enabled Directorates to focus on reducing the remaining underlying forecast overspend, reducing any additional negative impact on the level of the council's reserves at a time when the level of external financial risk is extremely high.

Capital

- The capital budget was reset at M9 to £210m. The M10 forecast of £201.4m is £8.6m less than the reset budget. Further details of the movement are set out in paragraph 11. The budget originally approved by Full Council in February 2022 was £212.1m.

Fees & Charges

- As part of the annual budget setting process, all Directorates have carried out a review of their fees and charges for 2023/24. The overall 2023/24 budgeted income from Fees and Charges is £93.8m, an uplift of £1.9m (2.0%) from 2022/23 forecast income. This increases to c6% uplift if Adult Social Care Charges are excluded. These are mainly governed by statutory regulations and would generally be offset by a higher level of increased care package expenditure.

- Paragraphs 14-23 set out the process undertaken and summarise the proposed changes to Fees and Charges for Cabinet to note and approve in advance of the start of the 2023/24 financial year.

Recommendations:

It is recommended that Cabinet:

1. Notes the Council's forecast revenue and capital budget positions for the year, including the use of the contingency budget and the commitment to continue to develop Directorate budget recovery plans.
2. Approves the transfer of the closing surplus revenue and capital balances of the Mead Infant School to its successor academy (revenue surplus £85,963.92 and capital surplus £3,789.76) (Paragraph 12 - 13)
3. Notes the summary of the Fees & Charges review (paragraph 14 - 23 and Annex 2)
4. Approves the new charges and increases to existing Fees & Charges that are more than budget setting guidance (paragraph 22 and Annex 3)

Reason for Recommendations:

This report is to comply with the agreed policy of providing a monthly budget monitoring report to Cabinet for approval of any necessary actions. It also outlines Cabinet requirement to approve the transfer of balanced for forced academy conversions and the Financial Regulations setting out when Cabinet approval is required for Fees and Charges price increases.

Revenue Budget:

1. **At M10, the Council is forecasting a full year overspend of £2.4m against budget.**
This comprises a £31.6m forecast overspend, offset by £12.2m from budget recovery plans (BRP) and the utilisation of £17m of the corporate contingency budget. This represents an improvement of £3.4m since last month. Table 1 below shows the forecast revenue budget outturn for the year by Directorate.
2. Through the budget envelope approach, Directorates are required to deliver services within their approved budget. Therefore, Directorates are tasked with mitigating activities to offset identified pressures, mitigate risks and maximise the opportunities available to contain costs.
3. In each of the last five financial years, this approach has been sufficient to deliver a year end position within budget. However, the unusual intensity of the pressures that the council has faced throughout 2022/23 has required additional measures to protect the council's financial position:
 - Directorates forecasting an overspend position have developed budget recovery plans to identify targeted additional in-year activities to mitigate the forecast overspend position. Directorates have identified plans of £12.2m to mitigate some of the forecast overspend.
 - Use of £17m of contingency budget, contained within Central Income & Expenditure, in recognition of the high levels of inflation experiences throughout the financial year, well in excess of the 4% budgeted for in February 2022. This also enables a focus on identifying mitigating activities to offset the residual forecast overspend of £2.4m.

Table 1 - Summary revenue budget forecast variances as at 31st January 2023

Directorate	Annual Budget	BAU M10 Adj Forecast	BAU Forecast Variance	Budget Recovery Plans	Forecast Variance
	£m	£m	£m	£m	£m
Adult Social Care	403.3	414.6	11.3	(9.1)	2.1
Public Service Reform & Public Health	36.4	36.4	(0.0)	0.0	(0.0)
Children, Families and Lifelong Learning	222.5	241.8	19.2	0.0	19.2
Comms, Public Affairs & Engagement	2.2	2.0	(0.1)	0.0	(0.1)
Surrey Fire and Rescue	33.1	36.0	2.8	(0.2)	2.6
Customer & Communities	17.4	17.5	0.1	(0.1)	0.0
Environment, Transport & Infrastructure	136.5	136.3	(0.2)	0.0	(0.2)
Prosperity Partnerships & Growth	1.6	1.4	(0.2)	0.0	(0.2)
Resources	77.0	78.2	1.2	(1.2)	0.0
Central Income & Expenditure	65.8	63.3	(2.5)	0.0	(2.5)
Total before DSG High Needs Block Offset	995.9	1,027.5	31.6	(10.6)	21.0
DSG High Needs Block Offset	27.2	27.2	0.0	(1.6)	(1.6)
After DSG High Needs Block offset	1,023.1	1,054.7	31.6	(12.2)	19.4
Contingency	17.0	0.0	(17.0)		(17.0)
Total Budget Envelopes	1,040.1	1,054.7	14.6	(12.2)	2.4
Central Funding	(1,040.1)	(1,040.1)	0.0		
Overall after central funding	0.0	14.6	14.6		

Note: Numbers have been rounded which might cause a difference.

4. The forecast net Directorate overspend of £19.4m (before application of the contingency) relates primarily to:

Children, Families and Lifelong Learning (CFL) - £19.2m overspend, an improvement of £0.4m from M9, due to:

- There is a £12m projected overspend on Home to School Travel Assistance (H2STA), this is an improvement of £0.5m since Month 9. This is caused by demand pressures from the continuing increase in Education and Health Care Plans, inflationary pressures on suppliers and contracts, as well as the significant volatility of fuel prices experienced throughout 2022. The forecast includes additional demand anticipated between now and 31st March 2023. The projection includes cost reductions achieved in year from the implementation of the Council's new transport policy. A H2STA Oversight Board and Steering Group has been set up to oversee the improvement plans and future efficiencies in this area. There is also a focus on alternative delivery models, in collaboration with key stakeholders. We are taking a proactive approach to learning from other counties to support assumptions and inform operational and financial strategies.
- £5.5m overspend on External Children Looked After (CLA) placements – due to numbers of CLA and the full year effect of some high-cost placements which came in late March 2022. Planned reductions in residential placements through the big fostering partnership have not occurred alongside cost inflation which are both adding to the overspend.
- £3.1m overspend on Children with Disabilities (CWD) Care - this is a residual pressure from 2021/22 due to high levels of demand for direct payments and personal support.
- £2.1m overspend on Quadrant Area Teams, CWD and Fostering staffing – this relates to the double funding of the assessed and supported year in employment (ASYE) social work cohort through the use of agency staff for three months while ASYE's gradually build up their caseload; alongside additional staffing costs in fostering due to the level of agency staff. An efficiency around standardising leave between agency and permanent workers is planned but not yet delivered due to workload requirements.

- £1.6m forecast overspend on Care Leavers due to the level of demand and increases in average costs.
- Partly offset by £4.6m Covid-19 funding. An assessment of extra costs applicable to the pandemic resulted in an increased drawdown of Covid-19 funding. This is predominantly within staffing, social care placements and income levels in services which have not recovered post lockdowns.

Adult Social Care – £2.1m net overspend, an improvement of £1.7m from M9, (£11.3m forecast overspend offset by £9.1m Budget recovery plan) due to: £14.5m pressure on care package budgets due to forecast non-achievement of efficiencies relating to market pressures and capacity challenges, increased costs of care due to higher acuity of care needs, growing post pandemic demand and rising assessed fees & charges debt. This is partially offset by staffing underspends and the budget recovery plan including draw down of reserves earmarked for ASC, use of Contain Management Outbreak Fund monies for ongoing additional care package expenditure related to the pandemic, releasing old year accruals, additional funding from the ASC discharge grant, and measures taken since October 2022 to try to slow down care package spending and implement a temporary recruitment freeze until the end of March 2023.

Surrey Fire and Rescue - £2.6m net overspend, a deterioration of £0.2m from M9, (£2.8m forecast overspend offset by £0.2m Budget recovery plan): primarily due to additional recruitment and training in response to recruitment by the London Fire Brigade, anticipated retirements and existing vacancies, together with increased costs of communication systems, staffing pressures through increased use of on-call staffing, national changes to holiday pay on overtime, ill health retirements, and increased costs of fuel and vehicle repairs. Some offsetting underspends are already included in the forecast and £0.2m of budget recovery plans (e.g. use of grants to cover existing staffing costs and capitalisation of staff and other appropriate costs). Officers continue to review these pressures and wider spend to identify any further mitigations. The position has worsened by £0.2m this month due to logistics costs and overtime due to vacancies and skills deficits (following LFB recruitment).

Resources – balanced position forecast, an improvement of £0.5m from M9, (£1.2m forecast overspend offset by £1.2m Budget recovery plan) due to: overspends of £1.4m mainly due to price inflation on utilities, resulting in forecast pressures in Land & Property. Furthermore, delays to the planned agile moves mean that some of the Land & Property efficiencies are unlikely to be delivered. In addition, there is continued increased demand for legal services. This is offset by £1.2m budget recovery plans and £0.2m underspends. Services have implemented a range of measures to mitigate the pressures, including use of reserves, reduced staffing costs by delaying non-statutory recruitment and continual appraisal of premises costs to mitigate the challenging inflation pressures.

Offset by:

- **Central Income and Expenditure - £2.5m underspend, unchanged since M9:** The forecast underspend is due to £0.3m increased interest receivable caused by improved cash balances and yield, £1.7m underspend on redundancies reflecting fewer service restructures and the improved evaluation of the Minimum Revenue Provision, based on the 2021/22 capital outturn and funding (net £0.5m).

- **Utilisation of Corporate Contingency Budget - £17m.** The total contingency budget for 2022/23 is £20m. £3m has already been allocated to fund the cost of the 2022/23 approved pay award above what was included in the budget approved in February 2022 and the cost of additional payments relating to the Real Living Wage and mileage enhancements.
 - **DSG High Needs block - £1.6m budget recovery plan:** £1.6m has been included based on a reduction in the contribution required to the DSG High Needs Block offsetting reserve (paragraphs 6-8 below).
5. In addition to the forecast overspend position, we monitor emerging risks and opportunities throughout the year. These are activities that could impact on, but are not currently included in, the forecast outturn position. Wherever possible the potential financial value of risks and opportunities are estimated and scored for the likelihood of the risk or opportunity occurring, to calculate the weighted risk / opportunity. At the end of January there were £10.3m of weighted risks and £1.2m of weighted opportunities, resulting in net weighted risks of £9.2m, not currently included in the latest forecast outturn position. As well as taking action to reduce the current forecast overspend, Directorates are taking action to mitigate these risks to avoid increased budget pressures.

Dedicated Schools Grant (DSG) update

6. The table below shows the projected forecast year end outturn for the High Needs Block.

Table 2 - DSG HNB Summary

2022/23 DSG HNB Summary	
	£'m
DSG High Needs Block Grant (exc Academies)	202.2
Forecast outturn	235.2
<i>Deficit/(surplus)</i>	<i>33.0</i>
Safety valve overspend	33.0
<i>Deficit/(surplus)</i>	<i>0.0</i>
Contribution required to reserve	25.6
Reserve contribution budget	27.2
<i>Deficit/(surplus)</i>	<i>(1.6)</i>

7. The third quarter monitoring report has been submitted to the DfE for the safety valve agreement. This identified that the Council remains on track with its agreed trajectory, although it also noted the increasing pressures caused by rising inflation, in particular to the long-term funding of the planned Capital programme. There will be the final one required for submission this financial year.

8. As the Council remains on track to achieve its safety valve trajectory, the £1.6m surplus High Needs Block contribution has been released into the forecast as part of the budget recovery work.

Capital Budget

9. The 2022/23 Capital Budget was approved by Council on 8th February 2022 at £212.1m, with a further £71.0m available to draw down from the pipeline and £18m budgeted for Your Fund Surrey expenditure.
10. Capital budgets were reset at M9 to ensure that they provided a more accurate position, taking into account 2021/22 carry forwards, acceleration, known delays and in-year approvals. The revised budget was re-set at £210.0m. At M10 the projected year end forecast is an underspend of £8.6m against this re-set budget. Strategic Capital Groups are working towards mitigating this slippage, to the extent possible, for the remainder of this financial year.

Strategic Capital Groups	Reset Budget at M9 £m	Outturn Forecast at M10 £m	M9 Forecast Variance £m	M10 Forecast Variance £m	Change from M9 to M10 £m	Increase / Decrease / Unchanged
Property						
Property Schemes	75.8	74.2	0.0	(1.6)	(1.6)	Decrease
ASC Schemes	1.6	1.5	0.0	(0.1)	(0.1)	Decrease
CFLS Schemes	2.5	1.9	0.0	(0.6)	(0.6)	Decrease
Property Total	79.9	77.6	0.0	(2.3)	(2.3)	Decrease
Infrastructure						
Highways and Transport	85.6	82.7	0.0	(2.9)	(2.9)	Decrease
Infrastructure and Major Projects	11.9	12.9	0.0	1.0	1.0	Increase
Environment	14.7	10.5	0.0	(4.2)	(4.2)	Decrease
Surrey Fire and Rescue	2.5	2.5	0.0	(0.0)	(0.0)	Decrease
Infrastructure Total	114.6	108.5	0.0	(6.1)	(6.1)	Decrease
IT						
IT Service Schemes	15.5	15.3	0.0	(0.2)	(0.2)	Decrease
IT Total	15.5	15.3	0.0	(0.2)	(0.2)	Decrease
Total	210.0	201.4	0.0	(8.6)	(8.6)	Decrease

11. The factors contributing towards the net changes across Strategic Capital Groups are detailed below.
- **Property Schemes – £1.6m overall decrease** due to unresolved planning issues on Extra Care DBFO works (£1m) and LAC Scheme site delays (£0.6m). Additionally, there was £1m slippage on Corporate and Schools Maintenance, 0.1m slippage on Independent Living schemes due to planning and service delays. These variances were offset by a £0.8m increase on SEN following approval and progression of three Pipeline schemes. Additionally, a £0.3m increase in Alternative Provision capital programme following acceleration of works at the Fordway Centre in January.
 - **ASC Schemes - £0.1m overall decrease** due to the planned carry forward of the Major Adaptations budget, as works are not due to complete in this financial year.
 - **CFLS Schemes - £0.6m overall decrease** mainly due to the extension of the final phase of an Education Management System project, which means that the final

capital contract costs will not be paid this financial year. This extension was approved after the M9 budget monitoring cycle.

- **Highways and Transport Schemes - £2.9m overall decrease.** Following assessment and investigation, a number of bridge maintenance schemes are now expected to take longer to complete which will result in a reduced cost this financial year (£1.3m). Other schemes within the programme have been delayed for a number of different reasons including resourcing issues and the need to reprofile works to accommodate other planned works or to take advantage of lower levels of traffic during school holidays.
- **Infrastructure and Major Projects - £1m overall increase** reflecting the latest programme for the A320 Housing Infrastructure Fund scheme, with additional works now expected to take place this financial year (£1.4m), offset by smaller days to other projects.
- **Environment Schemes - £4.2m overall decrease** relates to the Sustainable Warmth grant-funded programmes. The Council has had a significant number of applications for works on Band D properties which could not progress due to grant eligibility criteria, which is determined by the Department for Business, Energy & Industrial Strategy (BEIS). This was raised with BEIS in December, at which point the delivery agent had confidence that BEIS would allow all applications to progress. However the decision to allow these to progress was only made in February, which has meant that some works had to be moved into 2023/24. Further delays have been caused by adverse weather in December, delaying installations.
- **IT Service Schemes - £0.2m overall decrease** due to £0.1m of slippage on IT Infrastructure projects, and a minor underspend on an Agile Workforce Transformation budget that was carried forward from 2021/22 but has not been spent

Transfer the surplus school balances of a forced conversion

12. The Mead Infant School converted to a sponsored academy on 1 Nov 2022 following an OFSTED judgement of inadequate. The closing surplus balances of the school at the date of conversion were £85,963.92 revenue and £3,789.76 capital.
13. As it is a directed sponsored conversion, the Local Authority can choose whether the surplus transfers to the academy, and this requires Cabinet approval, whereas where a school converts to an academy by choice (the majority of conversions) the surplus of the former maintained school automatically transfers to the successor academy. It is recommended that the surplus balances are transferred to the successor academy because:
 - this will allow them to be used for the benefit of the school and pupils for which the funds were allocated;
 - schools in this position generally incur significant school improvement costs;
 - the surplus involved (approx. 5% of 2021/22 funding) is below the average for Surrey primary schools; and
 - this is consistent with past decisions.

2023/24 Fees & Charges

14. Charges for services is a key source of financing local services. Fees and charges income is regularly reviewed and should be increased annually to take account of inflation, demand and any other appropriate factors particular to individual charges. The exception to this is in respect of charges which are set nationally by Central Government.
15. As part of the annual budget setting process, all Directorates have carried out an extensive annual review of their fees and charges, in advance of the commencement of the 2023/24 financial year. These reviews were carried out by senior officers and Budget Managers, in consultation with Finance. For 2024/25, the outcomes of the annual fees and charges review will form part of the suite of MTFs to be approved by Cabinet and Full Council in early 2024.
16. The 2023/24 budgeted income from Fees and Charges is £93.8m, an uplift of £1.9m (2.0%) from 2022/23 forecast income. This increases to c6% uplift if Adult Social Care Charges are excluded. These are mainly governed by statutory regulations and would generally be offset by a higher level of increased care package expenditure.
17. The total Fees and Charges budget is summarised below and further details are provided in Annex 2.

Directorate	2022/23 Forecast Income	2023/24 Budgeted Income	Income level uplift
	£000s	£000s	£000s
Adult Social Care	65,611	65,948	337
Customer and Communities	7,644	8,351	707
Children Families and Lifelong Learning	6,627	6,774	147
Surrey Fire & Rescue	25	31	6
Environment Transport & Infrastructure	9,051	9,635	584
Resources	3,005	3,108	103
Total for all Directorates & Services	91,963	93,846	1,883

*The above table compares the forecast income for 2022/23 to the budgeted income for 2023/24, so takes into account variances from budgeted income in 2022/23. There are a number of areas where volume uncertainty and volatility remains and levels have not returned to pre-pandemic levels.

18. The new Financial Regulations delegate approval to Budget managers to increase their Fees & Charges in consultation with Strategic Finance Business Partners if the increase is in line with budget setting guidance or rounding.
19. On 31st January Cabinet approved the 2023/24 Budget. In setting the 2023/24 budget, there was additional focus on fees and charges in order to optimise our income and funding levels.
20. Directorates have reviewed their fees and charges in line with corporate guidance. Guidance suggest that fees and charges should generally be increased in line with inflation. The table shows that fees have increased by an average of c6% (excluding Adult Social Care fees). While current inflation rates are higher, it is important that prices

set are both competitive but do not adversely impact on volumes. The income increases shown here include forecasts of volume changes.

21. Within the schedules to be published, there are some fees and charges that have increased more than inflation. Most of them are due to re-evaluating the direct cost incurred in providing the service, unifying charging (one fee rather than three or removal of ranges), simplifying charging by introducing a range to accommodate options, or stepped / rounding increases (increased from £250 to £300).
22. In reviewing all of the individual Fees and Charges there are a few exceptions that require approval. There are six existing charges that require approval either due to changes in service delivery either new pricing models or billing methodologies and one new charge. The details are included in Annex 3:

Description of goods/services for which a fee/charge is made	Rates (incl VAT)		
	2022/23 charge	2023/24 charge	Change in rate
	£	£	%
Existing Fees and Charges			
Children, Families and Lifelong Learning			
<u>Surrey Outdoor Learning</u>			
Venue Hire - Grand Hall / Big Top HA (non-SCC)	£487	£690 - £1,150	42%-136%
Venue Hire - Grand Hall / Big Top HA (SCC)	£271	£375 - £1,050	38%-287%
Customer & Communities			
<u>Registration & Nationality Services</u>			
Non-Statutory Ceremony in Registry Office	£260 - £350	£471 - £718	81%
Non-Statutory Ceremony in Licensed venue	£360 - £470	£619 - £919	72%
<u>Trading Standards</u>			
Fixed fee set up of the primary authority partnership arrangements for Trading Standards to encourage transition from arrears billing to billing in advance	£786	£824	5%
Renewal fees of the primary authority partnership arrangements for Trading Standards to encourage transition from arrears billing to billing in advance.	£563	£588	4%
New Fees and Charges			
Environment, Transport and Infrastructure			
<u>Education Services offer</u>			
Woodland Creation Pack		£238	

Existing Charges:

Customer & Communities - Registration & Nationality Services – Non Statutory Ceremonies (either in Registry Officer or in Licensed Venue) will be delivered to include option to live stream, commemorative certificates and a place to have photos in reception. The new pricing model now reflects this. The charge has increased from a range of £260 - £470 in 2022/23 to £471 - £919 in 2023/24.

Customer & Communities – Trading Standards – Local Authority partnerships have reviewed their pricing model to encourage transition from arrears billing to billing in advance. Fixed fee for set up (from £786 to £824) and Renewal fees (from £563 to £588)

Children, Families and Lifelong Learning - Surrey Outdoor Learning Services has extensively reviewed their venue hire reflecting customer feedback to provide an inclusive package rather than separately charging catering and venue hire. For example: previously a group of 30 in the Grand Hall (£487), with refreshments and light buffet lunch would cost £646, the new inclusive price for the same numbers for 2023/24 is £690. The range of pricing is to accommodate increases in volumes and catering options.

New Charges:

Environment, Transport and Infrastructure: Education Services: They would like to formalise charging for Woodland Creation packs for Forest Schools and other educational institutions.

23. The increase in income projections were factored into the 2023/24 budget and Medium Term Financial Strategy to 2027/28, which was approved by Full Council in February 2023. Further information on fees and charges will be published (excluding commercially sensitive) alongside the transparency information from April 2023, where appropriate.

Consultation:

- Executive Directors and Cabinet Members have confirmed the forecast outturns for their revenue and capital budgets.

Risk Management and Implications:

- Risk implications are stated throughout the report and each relevant director or head of service has updated their strategic and or service risk registers accordingly. In addition, the Corporate Risk Register continues to reflect the increasing uncertainty of future funding likely to be allocated to the Council and the sustainability of the Medium-Term Financial Strategy. In the light of the financial risks faced by the Council, the Leadership Risk Register will be reviewed to increase confidence in Directorate plans to mitigate the risks and issues.

Financial and Value for Money Implications:

- The report considers financial and value for money implications throughout and future budget monitoring reports will continue this focus.

Section 151 Officer Commentary:

- Although significant progress has been made to improve the Council's financial position, the financial environment remains challenging. The UK is experiencing the highest levels of inflation for decades, putting significant pressure on the cost of delivering our services. Coupled with continued increasing demand and fixed Government funding this requires an increased focus on financial management to ensure we can continue to deliver services within available funding. In addition to these immediate challenges, the medium-term financial outlook beyond 2022/23 remains uncertain. With no clarity on central government funding in the medium term, our working assumption is that financial resources will continue to be constrained, as they have been for the majority of the past decade. This places an onus on the Council to continue to consider issues of financial sustainability as a priority in order to ensure stable provision of services in the medium term.

- The Council has a duty to ensure its expenditure does not exceed the resources available. Contingency budgets held by the Council provide confidence that the budget remains balanced at this stage. However, it is recognised that the current economic climate and rising inflation provides a significant challenge to delivering services within available budget resources. The Section 151 Officer confirms the financial information presented in this report is consistent with the Council's general accounting ledger and that forecasts have been based on reasonable assumptions, taking into account all material, financial and business issues and risks.

Legal Implications – Monitoring Officer:

- The Council is under a duty to set a balanced and sustainable budget. The Local Government Finance Act requires the Council to take steps to ensure that the Council's expenditure (that is expenditure incurred already in year and anticipated to be incurred) does not exceed the resources available whilst continuing to meet its statutory duties.
- Cabinet should be aware that if the Section 151 Officer, at any time, is not satisfied that appropriate strategies and controls are in place to manage expenditure within the in-year budget they must formally draw this to the attention of the Cabinet and Council and they must take immediate steps to ensure a balanced in-year budget, whilst complying with its statutory and common law duties.

Equalities and Diversity:

- Any impacts of the budget monitoring actions will be evaluated by the individual services as they implement the management actions necessary. In implementing individual management actions, the Council must comply with the Public Sector Equality Duty in section 149 of the Equality Act 2010 which requires it to have due regard to the need to eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under the Act; advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it; and foster good relations between persons who share a relevant protected characteristic and persons who do not share it.
- Services will continue to monitor the impact of these actions and will take appropriate action to mitigate additional negative impacts that may emerge as part of this ongoing analysis.

What Happens Next:

The relevant adjustments from the recommendations will be made to the Council's accounts.

Report Author:

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Consulted: Cabinet, Executive Directors, Heads of Service

Annex:

Annex 1 – Forecast revenue budget as at 31st January 2023

Annex 2 – Summary of the 2023/24 Fees & Charges and Directorate Commentary

Annex 3 - New Fees & Charges requiring approval

Annex 1

Forecast revenue budget as of 31st January 2023

Service	Cabinet Member	Full Year	Full year net	Full Year net	Full year net
		Gross budget £m	budget £m	forecast £m	forecast variance £m
Education and Lifelong Learning	C Curran	221.5	21.6	21.4	(0.2)
Family Resilience	S Mooney	37.7	34.2	32.9	(1.4)
Corporate Parenting	S Mooney	120.4	105.2	114.0	8.7
Quality and Performance	S Mooney	10.6	9.6	9.5	(0.1)
Commissioning	S Mooney	137.8	53.2	65.0	11.8
CFLC Exec Director	S Mooney	(1.3)	(1.3)	(0.9)	0.4
Children, Families and Lifelong Learning		526.6	222.5	241.8	19.2
Public Health	M Nuti	35.6	34.5	34.5	(0.0)
Public Service Reform	M Nuti	1.1	1.9	1.9	(0.0)
Public Health and PSR		36.7	36.4	36.4	(0.0)
Adult Social Care	M Nuti	549.6	403.3	405.5	2.1
Highways & Transport	M Furniss / K Deanus	71.9	56.8	56.5	(0.4)
Environment	M Heath/ N Bramhall	76.9	74.7	74.9	0.2
Infrastructure, Planning & Major Projects	M Furniss	5.4	3.0	2.8	(0.2)
Leadership Team	M Furniss	1.5	1.5	1.7	0.2
Emergency Management	K Deanus	0.5	0.5	0.5	0.0
Environment, Transport & Infrastructure		156.3	136.5	136.3	(0.2)
Surrey Fire and Rescue	D Turner- Stewart	38.8	33.1	35.7	2.6
Armed Forces & Resilience	K Deanus	0.1	0.1	0.1	0.0
Comms, Public Affairs & Engagement	T Oliver	2.1	2.1	1.9	(0.1)
Communications, Public Affairs and Engagement		2.2	2.2	2.0	(0.1)
PPG Leadership	T Oliver	0.3	0.3	0.3	(0.0)
Economic Growth	M Furniss	1.3	1.3	1.1	(0.2)
Prosperity, Partnerships and Growth		1.6	1.6	1.4	(0.2)
Community Partnerships	D Turner-Stewart	1.5	1.5	1.4	(0.1)
Customer Services	D Turner-Stewart	3.0	2.9	2.8	(0.1)
AD Culture & Active Surrey	D Turner-Stewart	19.5	6.7	6.7	(0.1)
Surrey Arts	D Turner-Stewart	0.4	0.4	0.4	0.1
Trading Standards	D Turner-Stewart	3.9	2.0	1.8	(0.1)
Health & Safety	D Turner-Stewart	0.7	0.3	0.3	0.0
Coroners	K Deanus	3.8	3.7	3.9	0.3
Customers and Communities		32.8	17.4	17.4	0.0
Land and Property	N Bramhall	32.5	24.0	24.6	0.5
Twelve15	D Lewis	20.1	(1.5)	(1.5)	0.0
Information Technology & Digital	D Lewis	19.1	18.5	18.5	(0.0)
Finance	D Lewis	13.5	6.0	5.8	(0.1)
People & Change	T Oliver	7.3	7.2	6.9	(0.3)
Joint Orbis	D Lewis	6.4	6.4	6.1	(0.3)
Legal Services	D Lewis	5.4	4.9	5.6	0.7
Business Operations	D Lewis	4.0	2.0	1.8	(0.2)
Democratic Services	D Lewis	4.0	3.8	3.7	(0.0)
Corporate Strategy and Policy	D Lewis	2.1	1.6	1.4	(0.2)
Executive Director Resources	D Lewis	2.5	2.5	2.6	0.2
Transformation and Strategic Commissioning	D Lewis	1.4	1.4	1.1	(0.2)
Performance Management	D Lewis	0.2	0.2	0.1	(0.0)
Resources		118.6	77.0	77.0	0.0
Corporate Expenditure	D Lewis	108.0	65.8	63.3	(2.5)
Total before DSG High Needs Block					
Offset		1,571.2	995.9	1,016.9	21.0
DSG High Needs Block Offset		27.2	27.2	25.6	(1.6)
Total Budget Envelopes		1,598.4	1,023.1	1,042.5	19.4
Contingency		0.0	17.0	0.0	(17.0)
Total Budget Envelopes		1,598.4	1,040.1	1,042.5	2.4
Central funding			(1,040.1)	(1,040.1)	0.0
Total Net revenue expenditure including DSG HNB		1,598.4	(0.0)	2.4	2.4

Annex 2

Summary of the 2023/24 Fees & Charges and Directorate Commentary

	2022/23 Forecast Income	2023/24 Budgeted Income	Income level uplift
Directorate	£000s	£000s	£000s
Adult Social Care	65,611	65,948	337
Customer and Communities	7,644	8,351	707
Children Families and Lifelong Learning	6,627	6,774	147
Surrey Fire & Rescue	25	31	6
Environment Transport & Infrastructure	9,051	9,635	584
Resources	3,005	3,108	103
Total for all Directorates & Services	91,963	93,846	1,883

Commentary:

Adult Social Care: The 2023/24 budget has been set based on the 2022/23 latest forecast. The vast majority of charging income for ASC relates to contributions people pay towards the cost of care packages funded by the Council based on a financial assessment of their means to pay. This assessed charging income is governed by statutory regulations under the Care Act with local discretion for some aspects. The Directorate is not proposing any changes to areas of local discretion, but continues to keep this under review while recognising of course that any changes would require formal consultation. A modest increase to assessed charging income is budgeted for 2023/24 taking into account ASC's demand management plans and that in most cases an increase to charging income in this area will be offset by a higher increase to care package expenditure. The Directorate is also implementing new charges approved by Cabinet in December 2022 for setting up ASC providers to be paid VAT within tax regulations.

Customer and Communities: The Directorate relies on significant income generation and continues to face challenging income targets which, for some services, have not yet returned to levels before the covid pandemic. This risk is reflected in the lower 2022/23 income level. The 2023/24 budget assumes £0.4m additional income generation with a particular focus on additional service offers through Registrations plus inflationary and above inflationary uplifts to fees and charges.

Children Families and Lifelong Learning: There is a slight increase in the 2023/24 budget versus the forecast position for 2022/23, driven mostly by a forecast increase in income within Surrey Adult Learning. A number of challenges exist, including the impact of the cost of living crisis and services are driving efficiencies to alleviate pressures.

Surrey Fire & Rescue: The 2023/24 budget is slightly higher than the 2022/23 forecast, to reflect expected income levels.

Environment Transport & Infrastructure: Whilst most areas remain flat, the fees and charges budgeted income is higher than the 2022/23 forecast position, in the main due to extra income expected in Planning (S278/S38) and Highways which are the two largest budgets and have benefitted from increased volumes. However volumes remain under pressure in some other services areas and these risks will be managed within the wider budget envelope.

Resources: The 2023/24 budget assumes additional income from the sale of school meals and from additional services in IT&D. It also recognises the reduction in income for the data centre. There are some risks to achieving the challenging income targets, most notably in Business Services where the payroll offer to schools is affected by the delayed implementation of the new ERP system.

The below table provides some detail of where the income is generated across the Directorate / Services and the scale of the charges in those areas. It also highlights which services are restricted by commercially sensitivity and nationally set regimes.

Summary of the service area Income levels and summary of Fees & Charges

Directorate	Service	2022/23	2023/24	Income	Number of Fees/Charges	Commercially sensitive, Fees range, Locally or Nationally set etc.
		Forecast Income £000s	Budgeted Income £000s	Level uplift £000s		
ASC	All Services	65,611	65,948	337	43	21 Commercially Sensitive, local 22 Range from £2 minimum charges to £1,570 for set up and compliant establishments. Also includes the £24,500 Capital limit for community based care, Mixture of national and local
C&C	Blue Badge Team	197	180	(17)	1	£10 per application, National
	Strategic Risk Management	173	180	7	25	All Commercial Sensitive applied Schools, Local
	Registration & Nationality Services	3,600	4,000	400	19	Range from £11 for a certificate to £2,205 Approved premises application, Local
	Heritage (Archiving & Archaeology)	387	392	5	17	Range from £1 photocopies to £360 room hire, Mostly locally set except for replacement certificates
	Libraries	525	600	75	87	Range from Exemptions for over 70s to £25 to request periodical, local
	Surrey Arts	2,387	2,495	108	30	Range £26 for a Junior Workshop to £414 per Individual hour course, Local
	Trading Standards (local)	330	453	123	24	Range from £23.50 replacement weighbridge operators certificate to £1,937 Fixed Fees Partnership arrangement, local
	Trading Standards (national)	45	51	6	4	Relate to Explosive Regulations and Petroleum storage certificates, National

Directorate	Service	2022/23	2023/24	Income	Number	Commercially sensitive, Fees range, Locally or Nationally set etc.
		Forecast Income	Budgeted Income	Level uplift		
		£000s	£000s	£000s		
CFFL	Surrey Adult Learning	1,865	2,000	135	28	All relate to Course income and locally set. Increase is due to volumes rather than rate increase
	Surrey Outdoor Learning	2,480	2,500	20	83	Range from a meal (Catering) to £2,716 for 4 nights- Log Cabin Accommodation, Local
	School Relationships	401	404	3	2	Commercial Sensitive, Local
	Surrey Online School	498	450	(48)	12	Commercial Sensitive, Local
	Transport Co-ordination Team	200	120	(80)	4	Commercial Sensitive, Local
	Admissions	130	120	(10)	24	Commercial Sensitive fees relate to volume of admissions, Local
	Educational Psychologists	120	151	31	1	£597.36 ELSA charge to Academies, Local
	Schools (SEND/SEN)	15	15	0	1	Commercial Sensitive, Local
	User Voice	6	9	3	1	£700 Respect Training to Schools, Local
	Children's Workforce Academy	65	82	17	7	Range from £25 SSCP Third Sector 1/2 day to £196 CPI Training per Academy delegate, Local
	Education Safeguarding	45	52	7	2	DLS Training £37.50 and Safeguarding Learning Review £600, Local
	Local Authority Designated Officer (LADOs) and Child Employment	33	33	0	2	Chaperone Training and Late Application Fees £40 each, local
	School (Educational) Effectiveness	64	38	(26)	7	Commercial Sensitive, Local
	Education Services Offer	106	139	33	2	Commercial Sensitive, Local
	Race Equality and Minority Achievement (REMA)	268	300	32	9	Range from £57 Translations per hour to £623 FLR Assessments, local
Specialist Teachers for Inclusive Practice (STIP)	331	361	30	16	Mostly Commercial Sensitive, Local	
SFRS	Fire and Rescue Service	25	31	6	11	Range from £6 copy of Fire Report to £661 to recovery a large animal, local

Directorate	Service	2022/23	2023/24	Income	Number of Fees/ Charges	Commercially sensitive, Fees range, Locally or Nationally set etc.
		Forecast Income £000s	Budgeted Income £000s	Level uplift £000s		
ETI	Transport Development Planning	199	189	(10)	22	Range from £101 to £7,885 pre planning advice for 1 to +2000 dwellings, Local
	Highways - Information & Licences	1,497	1,717	220	26	Range from £10 replacement Concessionary bus pass to £817 licence, Local
	Highways - Streetworks	3,454	3,258	(196)	44	Range from £9 Minor Road Immediate Permit to £10,000 - Daily Utility overstay charge on protected street , Mixture of National and Local
	Highways - Temporary Traffic Orders	1,310	1,260	(50)	2	Range from £966 Emergency Traffic Order to £1,084 Temporary Traffic order, Local
	Highways - Cycle Training	165	361	196	9	Range from £3 per free school meal child "Feet First" to £15 per child Level 2, Local
	Highways - Laboratory fees	120	133	13	2	Range from £223 to Bespoke for recovery of laboratory fees, Local
	Planning - Historic Environmental Records (HER)	42	38	(4)	9	Range 0.26 for photocopy to £172 Priory HER Search, Local
	Flood Risk Planning & Consenting	16	18	2	13	Range from £178 per hour advice to £3,178 Large Application site visit, local
	Resources & Circular Economy - Waste CRC's	270	270	0	8	Range £4 per bag of Plasterboard waste to £50 a bag of Mixed Waste, Local
	Resources & Circular Economy - Vans	115	115	0	1	£8.50 Permit for Van to access recycling sites per annum, Local
	Planning - S278/S38	1,449	1,774	325	1	National set Planning County Applications
	Countryside Access	74	78	4	9	Range from £40 per Commons Map & Search (CON29 (O)) to £1,100 deregistration of common land, Local
	Planning - Company Travel Plan	61	61	0	2	£4,600 and £6,150 Travel Plan Auditing fee - standard / large development, Local
	Surrey Hills - Area of Natural Beauty (AONB)	2	2	0	3	Range from Free first 30 min of advice to £90 thereafter per hour advice non third sector, Local
	Planning Development	124	147	23	14	National set Planning County Applications
	Planning - Historic Environment Farm Environment Record (HEFER)	10	5	(5)	8	Range from £35 to £420 depending on banding and tier, National
	Surrey Countryside Partnership	65	95	30	42	Range from £1.53 per sheer grazing per week to £858 for 40+ volunteers corporate day, Local
	Network Resilience (Watercourse)	6	11	5	1	£50 Ordinary Watercourse Consenting fees, National
	Visitor Service - Activity Licences	42	60	18	53	Commercially Sensitive, Local
	Visitor Services - Filming	30	42	12	50	Commercially Sensitive, Local
ETI (new)	Education Services offer - Woodland Creation Pack	0	0	0	1	Annex 3

		2022/23 Forecast Income	2023/24 Budgeted Income	Income Level uplift	Number of Fees/ Charges	Commercially sensitive, Fees range, Locally or Nationally set etc.
Directorate	Service	£000s	£000s	£000s		
Resources	Legal Services	330	443	113	16	Range from £47 per hour for Paralegal travel time recovery to £3,600 for a Company Secretary to Local Authority Trading Company, Local
	People Business Partnering (HR Services)	41	129	88	12	Commercially Sensitive, Local
	Payroll Processing & Pensions	1,602	1,775	173	22	Commercially Sensitive, Local
	DBS checking team (Safer Staffing)	409	363	(46)	22	DBS checks £9.50 Volunteer to £47.50 Enhanced, Nationally Set. There are commercially sensitive internal rates
	Data Centre	423	238	(185)	2	£411 Orbis Customer and £600 Standard Customer Server Hosting Charge per month, Local
	Appeals Service	200	160	(40)	4	Commercially Sensitive, Local
Total for all Directorates & Services		91,963	93,846	1,883	860	

Annex 3 – New Fees & Charges

1. The new Financial Regulations delegate approval to Budget managers to increase their Fees & Charges in consultation with Strategic Finance Business Partners if the increase is in line with budget setting guidance or rounding.
2. In reviewing all of the individual Fees and Charges there are a few exceptions that require approval. There are six existing charges that require approval either due to changes in service delivery either new pricing model or billing methodologies and one new charge.

Existing Charges:

Customer & Communities - Registration & Nationality Services – Non Statutory Ceremonies (either in Registry Officer or in Licensed Venue) will be delivered to include option to live stream, commemorative certificates and a place to have photos in reception. The new pricing model now reflects this. The charge has increased from a range of £260 - £470 in 2022/23 to £471 - £919 in 2023/24.

Customer & Communities – Trading Standards – Local Authority partnerships have reviewed their pricing model to encourage transition from arrears billing to billing in advance. Fixed fee for set up (from £786 to £824) and Renewal fees (from £563 to £588)

Children, Families and Lifelong Learning - Surrey Outdoor Learning Services has extensively reviewed their venue hire reflecting customer feedback to provide an inclusive package rather than separately charging catering and venue hire. For example: previously a group of 30 in the Grand Hall, with refreshments and light buffet lunch would cost £646, the new inclusive price for the same numbers for 2023/24 is £690. The range of pricing is to accommodate increases in volumes and catering options.

New Charges:

Environment, Transport and Infrastructure: Education Services: They would like to formalise charging for Woodland Creation packs for Forest Schools and other educational institutions.

Fees & Charges - new goods/services

Description of goods/services for which a fee/charge is made	Rates (incl VAT)			Financials		Effective Date of New Rate	Charge set Nationally/ Locally?
	2022/23 charge	2023/24 charge	Change	Income for 2022/23	Income for 2023/24		
	£	£	%	£000s	£000s		
Existing Fees and Charges							
Children, Families and Lifelong Learning							
Surrey Outdoor Learning							
Venue Hire - Grand Hall / Big Top HA (non-SCC)	£487	£690 - £1,150	42%-136%	Part of the SOLD		01/04/2023	Locally
Venue Hire - Grand Hall / Big Top HA (SCC)	£271	£375 - £1,050	38%-287%	Overall Income Yield		01/04/2023	Locally
Customer & Communities							
Registration & Nationality Services							
Non-Statutory Ceremony in Registry Office	£260 - £350	£471 - £718	81%	Part of the Registration		01/04/2023	Locally
Non-Statutory Ceremony in Licensed venue	£360 - £470	£619 - £919	72%	Overall Income Yield		01/04/2023	Locally
Trading Standards							
1,2 Fixed fee set up of the primary authority partnership arrangements for Trading Standards to encourage transition from arrears billing to billing in advance	£786	£824	5%	0	0	01/07/2023	Locally
1,2 Renewal fees of the primary authority partnership arrangements for Trading Standards to encourage transition from arrears billing to billing in advance.	£563	£588	4%	0	0	01/07/2023	Locally
New Fees and Charges							
Environment, Transport and Infrastructure							
Education Services offer							
Woodland Creation Pack		£238		0	0	TBC	Locally
Comments/special considerations							
1 Initial pilot in 2022/23 for transitions from Hampshire indicated this fee works to reduce PAYG partnerships. Introducing as a permanent fee to the							
2 Not expected to yield extra funds as such, just a different way of paying in advance rather than arrears							

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