

Notice of Meeting

Cabinet



Date and Time

Tuesday, 26
November 2024
2.00 pm

Place

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

Contact

Huma Younis or Sarah
Quinn
huma.younis@surreycc.gov.uk
or
sarah.quinn@surreycc.gov.uk

Web:

[Council and
democracy
Surreycc.gov.uk](#)


@SCCdemocracy

Committee:

Natalie Bramhall, Clare Curran, Kevin Deanus, Matt Furniss, Marisa Heath, David Lewis, Sinead Mooney, Mark Nuti, Tim Oliver, Denise Turner-Stewart, Maureen Attewell, Steve Bax, Paul Deach, Jonathan Hulley

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 or Sarah Quinn on huma.younis@surreycc.gov.uk or sarah.quinn@surreycc.gov.uk.

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If you would like to attend and you have any special requirements, please email Huma Younis or Sarah Quinn on huma.younis@surreycc.gov.uk or sarah.quinn@surreycc.gov.uk. Please note that public seating is limited and will be allocated on a first come first served basis.

AGENDA

1 APOLOGIES FOR ABSENCE

To receive any apologies for absence.

2 MINUTES OF PREVIOUS MEETING: 29 OCTOBER 2024

(Pages
1 - 14)

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 (20 November 2024).

b PUBLIC QUESTIONS

The deadline for public questions is seven days before the meeting (19 November 2024).

c PETITION: SAVE SWIFT LANE (Pages 15 - 16)

One petition has been received requesting Surrey County Council to keep the Bagshot Recycling Centre on Swift Lane in Bagshot open. Closing the site will cause great difficulty to local residents who will be forced to make long journeys to dispose of their household rubbish. There will inevitably be an increase in fly-tipping in the countryside around Bagshot, Windlesham and Chobham, harming the environment and wildlife.

922 people signed this petition.

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 AND OTHER COMMITTEES OF THE COUNCIL (Pages 17 - 36)

To consider any reports from Select Committees, Task Groups and any other Committees of the Council.

For Cabinet to consider the following reports:

- A. Children not in school (Children, Families, Lifelong Learning And Culture Select Committee). A response from Cabinet is attached.
- B. Interim Recommendations from Select Committees following Budget Deep Dives and Budget Briefing Sessions. A response from Cabinet is attached.

6 LEADER / DEPUTY LEADER / CABINET MEMBER/ STRATEGIC INVESTMENT BOARD DECISIONS TAKEN SINCE THE LAST CABINET MEETING (Pages 37 - 42)

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 43 - 54)

To receive an update from Clare Curran, Cabinet Member for Children, Families and Lifelong Learning.

- 8 2025/26 DRAFT BUDGET AND MEDIUM-TERM FINANCIAL STRATEGY TO 2029/30** (Pages 55 - 108)
- The Council has a statutory duty to set a balanced budget in advance of each financial year. The Final Budget for 2025/26 will be presented to Cabinet in January 2025 and Full Council in February 2025. This report and the attached 2025/26 Draft Budget and Medium-Term Financial Strategy to 2029/30 sets out progress towards delivering a balanced budget.
- (The decisions on this item can be called-in by the Resources and Performance Select Committee)*
- 9 BAGSHOT COMMUNITY RECYCLING CENTRE** (Pages 109 - 158)
- The Report is to recommend the permanent closure of the Community Recycling Centre at Swift Lane, Bagshot GU19 5NJ and that opening hours of the Community Recycling Centre at Wilton Road Camberley be extended by an extra day a week (Tuesday) to compensate.
- (The decisions on this item can be called-in by the Communities, Environment and Highways Select Committee)*
- 10 EQUITY IN EDUCATION - NO LEARNER LEFT BEHIND - SURREY'S LIFETIME OF LEARNING STRATEGY** (Pages 159 - 232)
- Cabinet is asked to approve the Surrey Lifetime of Learning Strategy and its publication.
- (The decisions on this item can be called-in by the Children, Families, Lifelong Learning & Culture Select Committee)*
- 11 COORDINATED ADMISSIONS SCHEME FOR SEPTEMBER 2026** (Pages 233 - 258)
- The purpose of this report is to ensure Surrey determines and publishes its coordinated admissions scheme for 2026 in accordance with the requirements of the School Admissions (Admission Arrangements and Coordination of Admission Arrangements) (England) Regulations and the School Admissions Code.
- (The decisions on this item can be called-in by the Children, Families, Lifelong Learning & Culture Select Committee)*

12 APPROVAL TO PROCEED: CORONER'S SERVICE DIGITAL POST-MORTEM & MORTUARY FACILITY (Pages 259 - 268)

The Coroner's Service is seeking to deliver a digital post-mortem service in Surrey. This will enable Surrey County Council to meet its statutory responsibilities under Sections 2 & 5 of the Coroners and Justice Act 2009, contain rising costs for pathology services and provide an enhanced service by using available technology to significantly reduce the number of invasive post-mortems that take place in the county.

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

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

13 APPROVAL TO PROCEED: REGISTRATION & NATIONALITY SERVICE - NEW OPERATING MODEL (Pages 269 - 280)

The Registration and Nationality Service is seeking approval to take forward a new operating model to modernise delivery of the service. The proposed new operating model will provide a more localised, efficient and commercially minded service.

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

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

14 RIGHT HOMES, RIGHT SUPPORT: OLDER PEOPLE'S RESIDENTIAL AND NURSING CARE DELIVERY STRATEGY (Pages 281 - 366)

This report seeks Cabinet approval for our Residential and Nursing Care Delivery Strategy to improve our residential and nursing care offer for older residents in Surrey within the wider Right Homes, Right Support Strategy (RHRS). Its inclusion ensures that Surrey County Council (the Council) has a comprehensive strategy across Supported Independent Living for working age adults, affordable Extra Care Housing, and Residential and Nursing Care for older people.

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

- 15 DISPOSAL OF THE FORMER ABBEYWOOD CARE HOME, ASH** (Pages 367 - 372)
- This report seeks approval of Cabinet to the freehold disposal of the former care home at Abbeywood, Ash, following an open market campaign.
- (The decisions on this item can be called-in by the Resources and Performance Select Committee)*
- N.B There is a Part 2 report at Item 22.
- 16 DISPOSAL OF THE FORMER CARE HOME, ARUNDEL HOUSE, GARRETT'S LANE, BANSTEAD** (Pages 373 - 378)
- This report seeks approval of Cabinet to the freehold disposal of the former care home at Arundel House, Garretts Lane, Banstead, following an extensive open marketing campaign.
- (The decisions on this item can be called-in by the Resources and Performance Select Committee)*
- N.B There is a Part 2 report at Item 23.
- 17 DISPOSAL OF THE FORMER BARNFIELD CARE HOME AT UPFIELDS, HORLEY, SURREY** (Pages 379 - 384)
- This report seeks approval of Cabinet to the freehold disposal of the former care home Barnfield on Upfields, Horley, following an open marketing campaign.
- (The decisions on this item can be called-in by the Resources and Performance Select Committee)*
- N.B There is a Part 2 report at Item 24.
- 18 2024/25 MONTH 6 (SEPTEMBER) FINANCIAL REPORT** (Pages 385 - 396)
- This report provides details of the Council's 2024/25 financial position, for revenue and capital budgets, as at 30th September 2024 (M6) and the expected outlook for the remainder of the financial year.
- (The decisions on this item can be called-in by the Resources and Performance Select Committee)*
- N.B There is a Part 2 report at Item 26.

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 APPROVAL TO PROCEED: CORONER'S SERVICE DIGITAL POST-MORTEM & MORTUARY FACILITY (Pages 397 - 400)

The Coroner's Service is seeking to deliver a digital post-mortem service in Surrey. This will enable Surrey County Council to meet its statutory responsibilities under Sections 2 & 5 of the Coroners and Justice Act 2009, contain rising costs for pathology services and provide an enhanced service by using available technology to significantly reduce the number of invasive post-mortems that take place in the county.

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

21 APPROVAL TO PROCEED: REGISTRATION & NATIONALITY SERVICE - NEW OPERATING MODEL (Pages 401 - 406)

The Registration and Nationality Service is seeking approval to take forward a new operating model to modernise delivery of the service. The proposed new operating model will provide a more localised, efficient and commercially minded service.

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

22 DISPOSAL OF THE FORMER ABBEYWOOD CARE HOME, ASH (Pages 407 - 428)

This report seeks approval of Cabinet to the freehold disposal of the former care home at Abbeywood, Ash, following an open market campaign.

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

- 23 DISPOSAL OF THE FORMER CARE HOME, ARUNDEL HOUSE, GARRETT'S LANE, BANSTEAD** (Pages 429 - 456)

This report seeks approval of Cabinet to the freehold disposal of the former care home at Arundel House, Garretts Lane, Banstead, following an extensive open marketing campaign.

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

- 24 DISPOSAL OF THE FORMER BARNFIELD CARE HOME AT UPFIELDS, HORLEY, SURREY** (Pages 457 - 490)

This report seeks approval of Cabinet to the freehold disposal of the former care home Barnfield on Upfields, Horley, following an open marketing campaign.

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

- 25 2024/25 MONTH 6 (SEPTEMBER) FINANCIAL REPORT** (Pages 491 - 496)

This report sets out details of a debt relating to a deceased individual who received Adult Social Care services which were commissioned and paid by Surrey County Council.

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

- 26 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.

Terence Herbert
Chief Executive
Published: 18 November 2024

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 Wi-Fi is available; please ask the committee manager for details.

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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.

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 by the deadline stated in the agenda. 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 29 OCTOBER 2024 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.

(* 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
Paul Deach
Steve Bax
*Jonathan Hulley

Members in attendance:

Cllr Fiona Davidson, County Councillor for Guildford South-East
Cllr George Potter, County Councillor for Guildford East

**PART ONE
IN PUBLIC**

132/24 APOLOGIES FOR ABSENCE [Item 1]

Apologies were received from Clare Curran, Paul Deach and Steve Bax.

133/24 MINUTES OF PREVIOUS MEETING: 24 SEPTEMBER 2024 [Item 2]

These were agreed as a correct record of the meeting.

134/24 DECLARATIONS OF INTEREST [Item 3]

There were none.

135/24 PROCEDURAL MATTERS [Item 4]

The Leader explained that the agenda would be re-ordered so the substantive item on London Road could be taken earlier as a number of members of the public had attended the meeting for this item.

135/241 MEMBERS' QUESTIONS [Item 4a]

There were none.

136/24 PUBLIC QUESTIONS [Item 4b]

There were seven public questions. A response from the Cabinet was published in the supplementary.

Pat Daffarn asked a supplementary question in response to his original which was if all road and housing developments would be refused until a sustainable infrastructure was in place so that Surrey County Council could actually deliver their zero carbon commitments. The Cabinet Member for Highways, Transport and Economic Growth explained that all planning applications reside with Guildford Borough Council as the development authority and Surrey County Council was consulted on applications and made recommendations as necessary. The council funded bikeability and feet first training which targetted schools and had positive take up. The Cabinet Member did not believe that applications would be refused by the districts until a comprehensive network was in place but recognised that walking and cycling provision needed to be improved as new developments increased.

Doug Clare asked a supplementary question in response to his original which was if the Cabinet was going to listen to 2000 school children with no votes or listen to a small group of objectors stopping progress. The Cabinet Member for Highways, Transport and Economic Growth stated that a public consultation had been undertaken and people on both sides of the debate had been heavily lobbying the Cabinet.

Oliver Greaves asked a supplementary question in response to his original question which was if the Cabinet believed the impact on traffic, air quality, the cost benefit and the needs of all road users were relevant matters for Section 1. If not, then why not. Assuming the council did believe these were relevant matters, how could the council comply with its constitutional obligations when it do not have the traffic modelling report for Section 1, no pollution report had been produced for Section 1, no report had been produced considering the needs of all road users and no cost benefit analysis had been produced. The Cabinet Member for Highways, Transport and Economic Growth stated that as part of the consultation, a number of the points that the questioner raised were published and considered as part of the report.

The Cabinet Member would be happy to share these documents with the questioner. The whole route including Section 1 had traffic modelling carried out which was shared with the stakeholder group and also published. The scheme would reduce air pollution and improve air quality with increased cycling.

137/24 PETITIONS [Item 4c]

There were none.

138/24 REPRESENTATIONS RECEIVED ON REPORTS TO BE CONSIDERED IN PRIVATE [Item 4d]

There were none.

139/24 REPORTS FROM SELECT COMMITTEES, TASK GROUPS AND OTHER COMMITTEES OF THE COUNCIL [Item 5]

A Cabinet response to the report from the Additional Needs and Disabilities Parent Carer Experience Task Group was included in the supplementary agenda.

RESOLVED:

That the Cabinet response to the Select Committee report is noted.

140/24 LEADER / DEPUTY LEADER / CABINET MEMBER/ STRATEGIC INVESTMENT BOARD DECISIONS TAKEN SINCE THE LAST CABINET MEETING [Item 6]

There were six decisions for noting.

RESOLVED:

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

141/24 LONDON ROAD GUILDFORD ACTIVE TRAVEL SCHEME - INDEPENDENT TECHNICAL ASSESSMENT OF SECTION 1 FOR CONSIDERATION TO PROCEED [Item 8]

The Leader briefly introduced the item explaining that discussions around the scheme had been ongoing for nearly two years. The speakers would be given 3 minutes to speak on the item, followed by an introduction by the Cabinet Member for Highways, Transport and Economic Growth and then a discussion by the Cabinet.

Terry Newman from the London Road Action Group, made the following key points:

- Spoke against the report. Concerns were raised around inaccuracies in the ARUP report. It was commented that ARUPs accident data was inaccurate, official data reveals five slight car and pedal accidents in the five years to 2023, that was one a year and not two so the road was not worse than the rest of Surrey.
- 1.5 meter separation is unreliable and passing HGV mirrors were just centimetres away.
- The Highway Code protects pedestrians by prohibiting cycling on pavements, yet still condones sharing. If mixing pedestrians and cyclists is a last resort for 45% of the length and is considered safe why not use foot ways to create 100% shared paths.
- DfT has spent £2.3 billion knowing far too little about what this spending has achieved. No evidence has appeared to enable an opinion about net zero achievement, but a 5% reduction in traffic would need the removal of 750 vehicles daily only adding 300 hundred more cyclists.
- Surrey Highways actually wrote the road will remain the same width as it is currently, and that is incorrect, at the pinch point reviewed existing distance between kerbs is 8 metres.

Yasmin Broome from the Surrey Coalition of Disable People, made the following key points:

- Strongly opposing the scheme. Blind, visually impaired, disabled, older and vulnerable bus passengers should be able to get on and off the bus independently and directly from or to the pavement, as they have always done. They should not have to cross cycle lanes or step into a cycle lane to get on and off a bus.
- These designs are not safe or accessible for blind, visually impaired, older and many vulnerable groups of bus passengers. They create a new barrier to accessing public transport independently.
- Many people cite that shared bus stops are working well in other countries but this is not the case. In Denmark injuries to bus passengers caused by cyclists went up from 5 to 73 after the shared style bus stop design was introduced. In Islington, London in 2016 a shared bus stop was removed as it did not take account of the safety and accessibility needs of blind and visually impaired bus passengers.
- Zebra crossing and flashing lights have been tried and tested and will not change the behaviour of cyclists. We believe an number of incidents at these shared bust stops are going unreported. There is political support for a moratorium on shared bus stops. Lord Holmes of Richmond made a recommendation

in the House of Lords on the 25 of April 2024 around the dangers of floating bus stops.

William Clark and Charles Graham representing the George Abbott School, made the following key points:

- Will was a current student at the school and cycles to school and uses the London Road on most of his journeys. The London Road was very dangerous and Will tried to avoid cycling on this road at peak times due to how dangerous it was. He had many close calls with other vehicles and had an incident where he was cut up on a roundabout next to London Road and went over the handle bars of his bike.
- Charles was an alumni of the school and cycled to and from school for 7 years. He explained that when he was 13, he was knocked off his bike by a car trying to overtake him on the road because there was no cycle lane. He went into the hedge and injured myself.
- The scheme was important as cyclists have to travel on roads that are not safe. This scheme would make cycling safer. The school had made a commitment to reducing greenhouse gas emissions in any way possible and students cycling into school was an easy way to achieve this.
- Last year, George Abbott did a survey of 740 people and almost half of them said that they would cycle to school if there was improved cycle infrastructure in place.
- Things needed to change if we want to save our planet.

James Masterman representing the Guildford Bike User Group (G-BUG), made the following key points:

- Is a cyclist and lives 200 yards from London Road in Burpham. Burpham is part of an existing important bike lane network and no congestion is being added to the London Road by cycling.
- Only 1% of journeys on the London Road were by bike. 30% of reported injuries on the road are to cyclists.
- Segregating the cycle lane from traffic is something that Burpham residents want. In the public consultation, 5:3 were in support of this. The scheme would support the Council's own policies and plans including the Local Transport Plan 4. It would also support net zero ambitions. The council's own highway officers have redesigned the scheme following earlier concerns.
- ARUP have signed off the scheme from a safety point of view and the Local Member, George Potter and Local MP, Zoe Franklin support the scheme.

- Burpham Residents Association have no objection to the scheme. Cabinet were asked to support the scheme as it would be a travel improvement for the majority of Burpham residents who want to cycle but are scared to do so.

Cllr Fiona Davidson, Local Member for Guildford South-East, made the following key points:

- Asked Cabinet to vote against the scheme. The Cabinet report states the scheme has the support of the majority of local residents and that all the safety issues raised by those residents have been satisfactorily resolved by the ARUP report but this is not the case.
- The ARUP report was a limited desktop exercise and the author never visited the road.
- Residents in the Member's area which covers 3/8 of the road are heavily against the scheme and don't believe the scheme is safe and don't believe the outcomes justify the investment.
- London road was a safer road and in the last 5 years there had been 18 slight accidents, one serious, not involving a cyclist. Of the 18 slight accidents five involved cyclists and cars.
- Concerns were raised around the width of the new carriageway and its proximity to the footway. As some of the footway would be narrower this would cause issues for pedestrians and deter the disabled, the elderly and those with prams. As a partially sighted person the Councillor wouldn't use this footway as it's not an improvement on what exists now.
- Would support changes that could accommodate pedestrians, cyclists, and vehicles separately and safely but the A3100N is narrow in places.

Cllr George Potter, Local Member for Guildford East, made the following key points:

- Two thirds of the route is in his division as a County Councillor and as a district and borough Councillor the entirety of the route is in his area.
- All the objections raised regarding the scheme had been addressed including the 8 month road closure, unsafe road lane widths, the floating bus stops and safety concerns about some aspects of design.
- The scheme in question would bring about major improvements for pedestrian safety as the current pavements are too narrow in some places and crossing over the road in some places is impossible.
- The majority of residents support this scheme which has been identified as a major part of the sustainable movement corridor

in Guildford. Objectors have not stated what they would like to see instead of this scheme.

- The scheme has been independently assessed by ARUP and Active Travel England as being the best scheme possible given the physical constraints of the route. The scheme would be a major improvement in safety, not just for cyclists but for pedestrians along the current route.
- Asked Cabinet to support the recommendations put forward by officers who have spent the last 2 years developing the scheme.

The Cabinet Member for Highways, Transport and Economic Growth briefly introduced the report explaining that London Rd, Guildford is an active travel scheme funded and fully supported by an Active Travel England grant. It had progressed through the design and decision-making process as three separate identified sections. The scheme was previously considered for decision in February 2024. At this meeting, the decision was taken to proceed to delivery on Section 2 and carry out an independent technical review on Section 1 to enable future decision making on its delivery. A review undertaken by an independent professional engineering organisation concluded that the design of Section 1 allows HGVs to safely pass and that the shared use paths comply with LTN 1/20 guidance. The delivery of this project would allow the council to contribute to the ambitions of the Local Transport Plan 4 (LTP4) and help achieve the county's net zero carbon target by 2050. It was explained that officers had been engaging with residents on the scheme for the last two years and a consultation had been undertaken in 2023 to understand their views. In this consultation, 50% of respondents agreed that the design of Section 1 positively contributed to the safety of pedestrians, cyclists, and vulnerable road users.

The Cabinet Member for Adult Social Care spoke on the report stating that she had been contacted by the CEO for Sight for Surrey and the CEO for the Surrey Coalition of Disabled People who were not in support of the scheme. As an advocate for vulnerable people the Cabinet Member was concerned that the scheme would deter vulnerable people from using local facilities and being independent she could therefore not support the scheme.

The Deputy Leader and Cabinet Member for Customer and Communities recognised that a lot of time and deliberation had gone into consideration for the scheme. Although there are many benefits to the scheme one key area of concern was around safety. The technical review states that there may be an element of discomfort and giving way when users are passing one another on the shared pavement. This caused the Cabinet Member concern especially as there were 'pinch points' on the route and areas where the carriage way was more narrow. For this reason, the Cabinet Member could not support the recommendations.

The Cabinet Member for Health and Wellbeing, and Public Health stated his support for the scheme. The Cabinet Member declared that he was a Trustee of Active Surrey. The Cabinet Member explained that the UK was a nation of car drivers and if we are to change that and get fitter for the future we would need to see the introduction of schemes which would encourage walking and cycling. The Cabinet Member for Fire and Rescue, and Resilience thanked residents for their emails and thoughts regarding the scheme. The Cabinet Member stated that his main concern was with the width of the road and shared pathway and the impact this would have on vulnerable residents. Although the scheme would be grant funded it was important that the money was used wisely. The Cabinet Member stated that he would not be supporting the officer recommendations.

The Cabinet Member for Environment stated that safety was a serious issue but so was the need to make Surrey a better county with sustainable transport links and better air quality. The Cabinet Member stated that a shift in transport would never be easy and would cause disruption but would also bring about better health, less congestion and cleaner air. The Cabinet Member explained how decisive action from Dutch politicians around cycle lanes had led to the Netherlands becoming the cycling capital of the world. The Cabinet Member welcomed the £6m funding coming into the county as a result of the scheme and stated her support for the proposals.

The Cabinet Member for Finance and Resources declared that previously he had been a member and Chair of the Global Road Safety Partnership. He stated that the pros and cons for the scheme were evenly split. The two key issues he had were firstly around the width of the carriageway for two HGVs passing and the second was the width of the shared space/pavement. Although Cobham had shared spaces, the report states that in this scheme there would be areas where the shared space was narrow and could cause discomfort. The Cabinet Member had concern around the possible impacts on vulnerable residents after hearing from the Surrey Coalition of Disabled People and believed that the scheme needed to benefit everyone. The Cabinet Member therefore did not support the scheme.

The Leader started by saying that Surrey County Council was very supportive of people being more active which was one of the council's priorities. The council was also very passionate about reducing traffic as part of its net zero ambitions and this was one of the reasons why this scheme was introduced. The scheme had been significantly altered from what had been proposed originally. There was a recognition that appropriate consultation with residents hadn't been done. The Leader stated that issue around two HGVs passing safely on the road had caused compromise to the shared pathway, which in turn has caused concerns around safety. Concern was also felt for vulnerable residents. A full discussion had taken place over the last 2 years on the scheme.

The Leader thanked everyone for their contributions saying that the quality of conversations and submissions from everyone on both sides of the argument had been outstanding. The Leader explained that the Cabinet would be taking a vote on the recommendations in the report.

RESOLVED:

Following a discussion on the item, a vote was taken by the Cabinet on the following recommendations:

It is recommended that Cabinet:

1. *Notes the contents of the independent technical review of section 1 and its conclusions concerning whether the scheme complies with current design guidance.*
2. *Proceeds with the construction of Section 1 –based on the strength of support from the local community, alongside the conclusions of the independent technical review.*

There were THREE votes FOR and SIX votes AGAINST. The decision was therefore not carried.

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

142/24 CABINET MEMBER OF THE MONTH [Item 7]

The report was introduced by the Cabinet Member for Property, Waste and Infrastructure. The following points were made:

- The redevelopment of the former Debenhams site, Winchester was near completion. New tenants on the ground floor were at fit out stage ready to trade before Christmas and new tenants for upstairs had been found.
- Brightwells, Farnham: Practical Completion of the development of this new retail and leisure commercial scheme occurred in September. The council funded the commercial retail element of the regeneration of Farnham and also the substantial infrastructure.
- In terms of disposals, over the last five years, £150 million of capital receipts had been achieved and the council was on track to achieve another £55m for 2025/26.
- All soft and hard facilities management had been outsourced to Macro. The in-house team had reduced from 125 FTEs to a client team of 16 FTE team.
- Land & Property achieved the ISO 45001 certification following a recent audit. This is an international safety accredited certificate,

and a great achievement following 2 years of operational improvements.

- The Resource and Circular Economy Team were progressing a planning application and developing the business case for a Surrey Materials Recycling Facility (MRF). The MRF will sort kerbside collected recyclables into component streams of paper, glass, metals and plastics etc.
- The Resource and Circular Economy Team were developing a proposal for a Reuse Hub on Ivy Dean Cottage which is immediately adjacent to the Eco Park at Charlton Lane, Shepperton.
- Work was progressing on the A320 HIF bid north of Woking, with a view to mobilise works from November / December at the earliest. The works programme will be 18-months plus.
- Special thanks was given to land and property staff, the Managing Director for Halsey Garton Properties and waste and infrastructure staff for all the good work being done.

RESOLVED:

That the Cabinet Member of the Month report is noted.

143/24 YOUR FUND SURREY APPLICATION- NEW ROWLEDGE VILLAGE HALL PROJECT, FARNHAM [Item 10]

The report was introduced by the Deputy Leader and Cabinet Member Customer and Communities. The report recommended Cabinet to approve £800k towards the development of a new village hall. The current building was not fit for purpose and had little insulation, a leaking roof, did not meet environmental standards and was impossible to maintain economically. The existing hall was well-used, open-to-everyone and the only low-cost general-purpose community building within South Farnham. The new Rowledge Village Hall would serve the residents in the Rowledge community in South Farnham which is going through rapid growth with over 100 new homes having been built in the last 3 years. The Cabinet was being asked to fund 27% of the total project cost. The remainder of the funding would be secured via other means including CIL funding. It was commented that the Your Fund Surrey programme had delivered 325 projects over the last 4 years with £21m being allocated to projects.

The Cabinet Member for Fire and Rescue, and Resilience commented that it was positive to see that other sources of funding had already been secured for the new village hall.

RESOLVED:

1. That Cabinet agrees to fund the full amount requested of £800,000, comprised of:

- capital funding towards the development of the new village hall, to be paid in staged payments, on evidence of spend
 - Including 5% to be held by SCC until final evidence of completion and building control sign-off and income and expenditure provided
2. That Cabinet agrees that funding would be conditional on evidence of the sale of their existing land and all other funding being in place before release of any grant.

Reasons for Decisions:

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.

New Rowledge Village Hall Project aim to create a welcoming and supportive community space that will advance the health and wellbeing of the community including physical activities.

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

144/24 2024/25 MONTH 5 (AUGUST) FINANCIAL REPORT [Item 11]

The report was introduced by the Cabinet Member for Finance and Resources. It was explained that there was an inaccuracy on the front page of the report under the Capital heading which should read that '*At M5, capital expenditure of **£319.3m** is forecast for 2024/25. This is **£2.8m** more than the re-phased budget*'. At M5, the Council was forecasting an overspend of £16.7m against the 2024/25 revenue budget. This was a £1.3m deterioration in the forecast overspend compared with the end of month 4. The overspend reflected the challenges the council faced especially in the areas of home to school transport assistance and Older People care packages. Work was being undertaken to contain the overspend in the home to school transport budget which was now at £7.4m. Mitigating measures needed to be identified to compensate for the forecast overspend. Although the council had a £20m contingency in the budget the idea would be to use this minimally. An update was given on the Capital budget. The month five forecast was £319.1m, which is £2.8m more than the re-phased budget. The key challenge would be working together with services to identify mitigating measures to pull back the forecast overspend.

The Leader stated it would be important to continue to make the point to government around the difficulty in balancing the budget due to the increase in demand in adult social care services for adults with disabilities and the cost of home to school transport which was now costing the council over £70m. The local government finance settlement would be due in December and an item on the 2025/26 draft

budget and MTFFS would be considered at the November Cabinet meeting. Andy Brown had joined the council as Deputy Chief Executive and Section 151 Officer and was already working on the budget.

RESOLVED:

1. That Cabinet notes the Council's forecast revenue budget and capital budget positions for the year.

Reasons for Decisions:

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

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

145/24 SURREY SAFEGUARDING ADULTS BOARD ANNUAL REPORT 2023/24 [Item 9]

The report was introduced by Teresa Bell, Independent Chair of the Surrey Safeguarding Adults Board who explained that the term 'safeguarding is everyone's business' was overused and not every perceived risk required a referral through the Section 42 process under the Care Act. Safeguarding was not achieved by one single agency but by partners cooperating to prevent abuse and neglect and identifying this as early as possible. Appropriate action should then be taken by the partnership with the person impacted at the centre. It was explained that a new approach was being taken to the safeguarding adults reviews to ensure timeliness and avoiding lengthy delays. Helen Coombs and Luke Adams were thanked for their support to the Board.

The Cabinet Member for Adult Social Care welcomed the report and stated that it was good to see what the boards focus and priorities were. The Cabinet Member thanked the Independent Chair for her work and commented that she had galvanised partners across the board. The Leader echoed thanks to the Independent Chair stating that the Board was moving forward in a positive and constructive way.

RESOLVED:

1. That Cabinet considers and notes the Surrey Safeguarding Adults Annual Report for 2023/24.

Reasons for Decisions:

This recommendation demonstrates that the Council is fulfilling its statutory requirement under the Care Act 2014 in having established a Safeguarding Adults Board in its area.

It will support the SSAB to be transparent by providing information to the public on the performance of the Board and its strategic plan.

146/24 EXCLUSION OF THE PUBLIC [Item 12]

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.

147/24 LEADERS STATEMENT [Item]

The Leader explained that in light of new legal advice around the Project Libra report, the Council would not act further on the decision made by Cabinet on 24 September 2024. In the event that the matter came back to Cabinet, it would be considered wholly afresh.

148/24 PUBLICITY FOR PART 2 ITEMS [Item 13]

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

Meeting closed at 3.39 pm

Chairman

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Cabinet: 26 November 2024

PETITION TITLE: SAVE SWIFT LANE

Statement: We the undersigned petition Surrey County Council to not close the Swift Lane Recycling Centre in Bagshot. Surrey County Council are planning to close the Swift Lane Recycling Centre in Bagshot. This will cause great difficulty to local residents who will be forced to make long journeys to dispose of their household rubbish. There will inevitably be an increase in fly-tipping in the countryside around Bagshot, Windlesham and Chobham, harming the environment and wildlife. This is another erosion of public services. We demand that Surrey County Council listens to residents and keeps the Swift Lane site open.

Submitted by: Richard Wilson

922 Signatures

RESPONSE:

Details of the petition

A petition objecting to the potential closure of Bagshot Community Recycling Centre (CRC) was submitted by Surrey Heath Borough Council Councillor Richard Wilson to Surrey County Council's Democratic Services on 9th October 2024.

The title of the petition is:

"Surrey County Council are planning to close the Swift Lane Recycling Centre in Bagshot. This will cause great difficulty to local residents who will be forced to make long journeys to dispose of their household rubbish. There will inevitably be an increase in fly-tipping in the countryside around Bagshot, Windlesham and Chobham, harming the environment and wildlife. This is another erosion of public services. We demand that Surrey County Council listens to residents and keeps the Swift Lane site open".

Analysis

The petition was conducted using Change.org. It was submitted to the council on 9th October 2024 with 922 signatures. Further signatures have been added since receipt by SCC. However, SCC's procedures require that electronic petitions be treated as paper petitions and only signatures received up to the date of submission of the petition to SCC are considered.

Analysis of petition data shows the following:

- 396 (43%) were Surrey residents with 257 (28%) from the Bagshot catchment area used in the Cabinet Report on the closure of the site.
- 169 (18%) were from Royal Borough of Windsor and Maidenhead – who use Bagshot CRC with permission (they have no 'right to use' Surrey CRCs);
- 344 (37%) were from the UK, but not Surrey or RBWM;
- 12 (1%) were not UK.

The above data shows that approximately 1.04% of Surrey residents aged 18 and over whose closest CRC is Bagshot, signed the petition prior to submission to SCC.

This analysis does not suggest that the majority of local residents are against the closure.

Response

Responses to the petition raised concerns about increased fly-tipping, environmental impact and inconvenience. Surrey County Council's experience is that previous changes to CRC facility provision such as reduced opening hours and days have not resulted in any increased fly-tipping.

Surrey County Council's Resources and Circular Team are taking a report to Cabinet on 26th November recommending that Bagshot CRC be closed.

Residents of RB Windsor and Maidenhead will be directed to Lyne CRC in Chertsey.

The report sets out the rationale for closure, highlighting potential hazards and significant operational issues and detailing the results of public consultation. It also considers both the environmental impact of the potential closure and the impact on journey times to alternative sites.

Analysis undertaken by SCC's Transport Modelling specialists shows that the Swift Lane CRC in Bagshot is the closest CRC to 12,428 households.

- 63.47% (7,894) of these households would see no increase in drive time when accessing the nearest alternative (Lyne, Woking or Camberley) if the Bagshot site was to close.
- Of the remaining 4,544 households, none would have a drive time of greater than 20 minutes or 7.8 miles to the closest alternative site.

To compensate for the closure of Bagshot CRC nearby Camberley CRC will be opened for an additional day per week to compensate, meaning that Camberley CRC would be open for 7 days per week. Traffic movements at Camberley CRC will be monitored and it may be that the site could be open earlier at weekends should the evidence suggest earlier opening would be of benefit.

Residents of RB Windsor and Maidenhead would be directed to Lyne CRC in Chertsey which is convenient for them and would not contribute to additional usage at Camberley CRC.

It is therefore appropriate that Cabinet consider the proposal to close Bagshot CRC and determine whether the site should be closed at the Cabinet meeting on 26th November.

Natalie Bramhall

Cabinet Member for Property, Waste and Infrastructure

14 November 2024

CHILDREN, FAMILIES, LIFELONG LEARNING AND CULTURE SELECT COMMITTEE

Item under consideration: CHILDREN NOT IN SCHOOL (CNIS)

Date Considered: 12 September 2024

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1. The Committee requested a paper on Children Not in School (CNIS) to learn how many children of statutory school age are not attending school full-time or are electively home educated, and to explore the range of reasons and impact.
2. Legally, ensuring that children are in school falls to parents, schools and Surrey County Council. SCC has recently appointed a CNIS Service Manager to provide strategic oversight of these children, working with the relevant partners in a County Governance Group which he chairs.
3. Surrey has seen an increase in the numbers of children and young people who are not in school. Post-Covid, schools are reporting a different contractual understanding between parents and schools. Children are also exhibiting elevated levels of anxiety in relation to schools, due to working from home arrangements making it easier for parents to accommodate the wish to stay at home.
4. Surrey has a school age population (5-16 years) of 174,000. 7,165 are not in full-time education at school (for a variety of reasons) - of which 2,300 are electively home educated and 1,912 are receiving part-time school or alternative provision, which in some cases may amount to only a few hours each week.
5. More parents have chosen to educate at home since the pandemic, primarily due to dissatisfaction with the school or not getting the family's preferred placement. Of the 2,300 Surrey young people who were electively home educated, 146 had an EHCP and 602 had SEN without a Plan.
6. 87 Surrey children are categorised as Children Missing Education. The primary reasons given were that elective home education had been deemed unsuitable; or children with an EHCP had moved into the county and a suitable place not found, with Alternative Provision yet to be put in place.
7. There are 2,783 Surrey students classed as severely absent (i.e. missing 50% or more of school time) and a high proportion of these have additional needs – in June 2024 this was 34.9% with an EHCP and 27% with SEN support. Members considered that not enough was known about the consequences for these young people. It was proposed to look into the destinations of Year 11s who had been severely absent. In addition to the effect on educational outcomes, being at school is considered a protective factor and there may be safeguarding concerns when a child is not in school.

Recommendations

The Children, Families, Lifelong Learning and Culture Select Committee recommends that:

- 1) Surrey County Council (SCC) establishes and delivers a clear and coherent policy in respect of its role in monitoring children not in school and driving increased attendance, and identifies standards of best practice, including Key Performance Indicators for Surrey – by March 2025.
- 2) SCC should take a leadership role and work with the various parties involved to drive the implementation of these standards and improved performance in Surrey.
- 3) SCC should deliver an investigation on the impact of outcomes/life chances for children who are not in school, including those (a) severely absent from school and (b) electively home educated – by comparison with their peers.
- 4) Children with SEND should be clearly identified in the severely absent cohort, and, by March 2025, an action plan to remedy their high prevalence should be developed and ready for delivery.

Fiona Davidson, Chair - Children, Families, Lifelong Learning and Culture Select Committee

Background papers

[Report to Children, Families, Lifelong Learning Select Committee 12 September 2024, Item 8](#)

**CABINET RESPONSE TO THE REPORT OF THE CHILDREN, FAMILIES,
LIFELONG LEARNING AND CULTURE SELECT COMMITTEE**

Item under consideration: Children Not in School

Recommendations:

1. Surrey County Council (SCC) establishes and delivers a clear and coherent policy in respect of its role in monitoring children not in school and driving increased attendance, and identifies standards of best practice, including Key Performance Indicators for Surrey – by March 2025.
2. SCC should take a leadership role and work with the various parties involved to drive the implementation of these standards and improved performance in Surrey.
3. SCC should deliver an investigation on the impact of outcomes/life chances for children who are not in school, including those (a) severely absent from school and (b) electively home educated – by comparison with their peers.
4. Children with SEND should be clearly identified in the severely absent cohort, and by March 2025, an action plan to remedy their high prevalence should be developed and read for delivery.

Cabinet Response:

1. **This recommendation relates to work that is already in place.** Whilst acknowledging that where children are absent from school the initial responsibility for monitoring is with the school, we have established a Service Manager role in Education and Lifelong Learning which has oversight for all categories of Children Not in School. The postholder works with Surrey Attendance Service to encourage attendance at school. It is acknowledged, however that for some children there are periods of time when they are not able to attend school, and their education needs are met by alternative provision. A dataset was presented to the Select Committee. Further work is already underway to develop key performance indicators by March 2025.
2. **This recommendation relates to work that is already in place.** As stated above the Service Manager for CNIS works with a range of partners to achieve the agreed key performance indicators. In relation to attendance, regular feedback and updates are provided to the multi-agency forum “Encouraging School Attendance” chaired by Director of Quality and Performance.
3. **We accept the recommendation in part.** In relation to children who are Severely Absent we will look at their destination data on a case-by-case basis and undertake dip-sample audits. We will look to consider 10% of the Year 11 cohort of 394 children and young people who were Severely Absent in Academic Year 23/24, from the total number across all year groups of 2,287. The results of this analysis will be shared with the Select Committee.
We are unable to implement the recommendation in relation to those who are EHE. In relation to EHE there is no obligation for parents to share achievement and destination data with the Local Authority. We will, however, add to the guidance for EHE Inclusion Officers to enquire regarding a child’s next step for post-16.
4. **This recommendation relates to work that is already underway.** We have the data both locally and nationally relating to children with an EHCP who are severely absent. This data is used to inform our actions to continue to improve

the attendance of children with SEND, which is currently better than the national and regional picture.

- Severely Absent pupils with an EHCP - Autumn/ Spring Term 2023/24 – DfE
- Surrey – 12.3%, Southeast – 13.2%, National – 12.5%

Clare Curran

Cabinet Member for Children, Families and Lifelong Learning

26 November 2024

REPORT OF THE COUNCIL'S SELECT COMMITTEES

Item under consideration: INTERIM RECOMMENDATIONS FROM SELECT COMMITTEES FOLLOWING BUDGET DEEP DIVES AND BUDGET BRIEFING SESSIONS

Date Considered: September-October 2024 (Budget Deep Dives and Select Committee Budget Briefing Sessions)

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- 1 The four Select Committees of the Council share responsibility for the scrutiny of the Council's budget. Following an initial budget briefing in July 2024, each Committee selected two areas for budget *deep dive* to explore in more detail specific risks and opportunities relating to the development of the 25/26 budget with support from Finance and Service officers. This was followed by a second Budget Briefing in October 2024 at which the findings of the *deep dives* were discussed and more detailed thinking on the 25/26 draft budget was shared. These sessions highlighted the significant challenge in mitigating in year (24/25) overspend to bring spending down to a reasonable level, and in closing the budget gap and developing a balanced budget for 25/26.
- 2 During these budget briefings each Select Committee reviewed the in-year budget position (24/25), the emerging budget position for 2025/26 and over the Medium Term, and the Budget Gap. Directorate pressures and efficiencies for 2025/26 were discussed. Members probed the risks associated with efficiencies and transformation programmes and highlighted resident and service-user priorities.
- 3 Summaries of the informal Select Committee deliberations and the interim recommendations arrived at following budget *deep dives* are detailed below. These are intended to influence the final revenue and capital budget 2025/26 and are to be considered alongside the draft budget proposals to Cabinet in November. Deep dive recommendations were shared informally with Finance, Executive Directors and Cabinet Members mid-October to inform draft budget proposals. **This is the first year that Select Committees have formulated recommendations to Cabinet this early in the process, creating a greater opportunity to influence the final budget recommended to Council by Cabinet.** In previous years Select Committee recommendations have been made to Cabinet at its December or January meeting.

Communities, Environment and Highways Select Committee:

- 4 The Committee questioned the high costs of multi-year contracts including waste disposal and the Ringway highways contract. The inflationary assumptions built into contracts were considered. Budget pressures (£5m) arising from proposals to enhance highways services including verge maintenance were discussed and members raised residents' frustrations around weeds maintenance. The high proportion of Fire and Rescue expenditure on staffing was noted as was the potential impact of a higher than anticipated national pay award. The

Committee learnt that the Registrations service is fully self-funding delivering a contribution of approximately £1.7million to the Council budget. Future funding of community functions was discussed.

- 5
- 5 The Committee provided feedback on its *deep dive* into the Capital programme (EIG) and outlined a number of recommendations. Concern was expressed at the level of capital financing requirement (as a % of spending power) compared to other County Councils. The Committee heard that its conclusions matched those of Cabinet and work was already underway to address the Committee's concerns including to reprofile and reprioritise capital spend and benchmark borrowing against other authorities.
 - 6 The Committee provided feedback on its *deep dive* into Bus Services and DDRT (Digital Demand Responsive Transport). This had emerged as the main area of Committee concern with costs of around £3m* in FY25/26 rising to £12m over the MTFs period. The costs per passenger journey were not considered proportionate or justifiable when taken against decisions to withdraw home to school transport assistance from disabled children or those with additional needs and disabilities where the costs were lower. Committee Members reiterated deep concerns about the scheme unless it could be made more cost effective and suggested that this was an obvious area to consider savings to help close the budget gap.

** Since the deep dive workshop, following tender of phase 2 and subsequent contract award, the estimated costs for phase 3 have been revised to £1.5m, which will be confirmed through a later tender process.*

Children, Families, Lifelong Learning & Culture Select Committee:

- 7 The Committee heard about continued budgetary pressures arising from Home to School travel assistance, children's residential placements and the cost of provision of services for children with Additional Needs and Disabilities. The achievements of the directorate against this background of extreme financial pressure were highlighted by officers including expansion of specialist education places, increased timeliness of ECHPs and reduced numbers of children in care. Concerns were expressed around under-provision of social workers and ongoing difficulties filling vacancies in the sector.
- 8 The Committee provided feedback on its *deep dive* into VCSE infrastructure organisation funding and highlighted the importance of the services provided by Voluntary, Community, Social Enterprise Sector (VCSE) organisations. Although a small amount of money in budgetary terms this was an issue of importance to the Committee and reputationally for Surrey County Council. The impact assessment of the funding redistribution proposed was not available to the Committee and it is consequently unable to provide an informed recommendation. A review of the impact is planned by the end of November to enable a recommendation.

- 9 The Committee provided feedback on its *deep dive* into Early Help funding noting the belief that early help spend does have an impact on outcomes and reducing demand. Consequently, early help funding should be protected in the 2025/26 budget iteration with inflationary costs built in. The Committee would have liked clearer evidence of the direct link between preventative spending and reduced demand.

Adults and Health Select Committee:

- 10 The Committee considered the challenge of achieving cost savings through *Transformation and Demand Management*. Members questioned the level of efficiencies required in spite of rising demand, and the inherent challenge in delivering these savings. There was concern that sufficient resource was available to support transformation activity. The opportunities presented by technology enabled care was considered. Members learned how technology could help people stay independent in their homes and the Committee challenged officers to look again at discretionary spend and what more could be done to manage discretionary services more effectively.
- 11 The pace of transformation and demand management was discussed. Members questioned whether quicker progress could be made to mitigate budget pressures but acknowledged delivery of savings must not be made at the expense of residents' care. The importance of communications in re-setting any expectations and promoting the benefits and opportunities of technology enabled care were emphasised.

Resources and Performance Select Committee:

- 12 The select committee considered the work underway to reduce costs through changes to the shape of the workforce, recruitment and procurement controls, and a review of the capital programme, before turning to the reasons for changes to the expected budget gap across the rest of the medium-term. Officers assured members that is partly due to uncertainty in forecasting beyond 2025/26, as well as an expected Fair Funding Review. In response to a question on the impact of SEND funding on the budget, the committee heard how the Dedicated Schools' Grant's High Needs Block is less than the cost of the services that it funds alongside detail of the other pressures on this part of the budget.
- 13 Members heard how work with the Data teams and decreasing numbers of agency and interim staff was helping to drive down costs in Customer, Digital & Change, before noting that broadened objectives of the Organisational Redesign should generate further efficiencies and stating their desire to see the Customer Transformation Programme deliver return on the proposed investment. In Land & Property, contractualised inflationary pressures, the embedding of tighter contract management controls and the costs of vacant sites were discussed.

- 14 The Committee provided feedback from its *deep dive* sessions. The Committee noted the potential financial benefits of good data management and governance, and that poor quality data and governance could drive poor decision-making and poor performance. Members felt there was a strong case for continued investment in data improvements, noting that this was unfunded from 25/26. On workforce costs, the Committee noted the importance of work to continue increasing the number of minority ethnic workers at the council, and welcomed a forthcoming ethnicity pay gap report. The costs of employing significant numbers of agency staff were noted and members agreed that work should continue to keep this low.

Recommendations to Cabinet

Communities, Environment and Highways Select Committee:

Deep Dive Capital Programme

- I. The Council's capital financing requirement trajectory presents too high a risk with regards to affordability and financial stability. Levels of borrowing need to be reduced.
- II. Cabinet/Council should review its appetite for risk and set an appropriate limit for borrowing going forward. A risk policy should be put in place if it does not already exist. (This *might* prioritise most spend on projects which generate income or avoid future costs).
- III. Cabinet should re-examine the process for prioritising Capital programmes in line with SCC strategic priorities to drive more ruthless investment decisions and ensure the right schemes are coming through the pipeline in future.
- IV. Capital spend on highways maintenance for improving the overall condition and safety should continue to be prioritised to reflect resident concerns and priorities.

Deep Dive Bus Services & DDRT (Digital Demand Responsive Transport)

- I. Ongoing publicity and promotion of existing DDRT should be prioritised to increase numbers of passenger journeys to decrease the cost per passenger and increase value for money.
- II. Consideration should be given to delay/deferring phase 3 rollout of DDRT. Alternative bus provision should be investigated, including commercial bus services that might receive a subsidy. DDRT should only be introduced as the provider of last resort where all other options are exhausted. The Department should encourage the use of a more hybrid model (including fixed journeys) rather than a completely bespoke service.

Children, Families, Lifelong Learning & Culture Select Committee:

Early Help Deep Dive

'Is early help prevention activity sufficiently well-funded to increase the wellbeing and life chances of the most disadvantaged Surrey residents in line with SCC's policy of no one left behind?'

The Children, Families, Lifelong Learning and Culture Select Committee:

- I. Notes that investing in early help – which is discretionary funding - does make a positive difference. There are indications that early help reduces the demand on statutory services in Surrey, i.e., the number of children going into care, and the number on Child Protection Plans*.
- II. Believes investing more in preventive activities – such as easily accessed emotional wellbeing support for adolescents – would prevent young people's needs escalating, would contribute significantly to their wellbeing (and that of their families), and reduce the pressure on statutory services. Notes with regret there is no additional discretionary funding available to invest in prevention without making cutbacks elsewhere.
- III. Since preventive spending is having a positive impact on both outcomes for children and reduced statutory demand, recommends that early help spending is protected, with inflationary costs built in. The Committee is convinced of the value that early help brings and Cabinet should factor this into its budget decision-making.

**Cllr John O'Reilly would like to record his acknowledgment of SCC's successes in reducing the demand on statutory services in the county (i.e. the number of children going into care and the number of Child Protection Plans, contrary to the national trend).*

Voluntary, Community & Social Enterprise Deep Dive

'What is the likely impact on the infrastructure organisations – and on the organisations they support in the wider system - of the redistribution of funding, and can any negative impacts be mitigated?'

The Select Committee has withdrawn its recommendations in the light of new information on the impact of the proposals to withdraw funding from Surrey Community Action and redistribute it to other organisations. It will advise its recommendations following an investigation to clarify the situation, which is planned by the end of November.

Adults and Health Select Committee:

- I. The committee urges Cabinet to review the planned efficiencies and savings targets for FY 25/26 to be delivered via the Transformation Programme to ensure these are realistic and achievable.
- II. The committee acknowledges the challenges the transformation plan presents to the Adults, Wellbeing & Health Partnerships directorate (AWHP). Members of the committee have requested to be kept up to date on the delivery of transformation, ensuring key milestones are met.
- III. The committee recommends a review of discretionary services in all areas across the directorate, ensuring they are aligned with key pressures on managing demand and delivering good outcomes. The committee expects to see evidence to demonstrate this.
- IV. The directorate continues to prioritise joint working and integration ensuring that everyone gets best value and outcomes.

Resources and Performance Select Committee:

Workforce Costs Deep Dive – The Select Committee:

- I. Recommends the model behind the Organisational Design Principles as well as their upcoming review.
- II. Recommends that the Cabinet agrees action plans for the implementation of the six ‘spans and layers’ and clarifies the changes and potential savings that this will deliver from the present configuration.
- III. Recommends that work continues to restrict the amount of agency staff at the council to ensure that the associated costs are reduced.

Data Deep Dive - The Select Committee:

- I. Recommends exploratory work is undertaken into the possibility of implementing a ‘golden single source of data’ practice across the council.
- II. Recommends that work clarifying how the estimated investment costs of the programme were arrived at is shared with the select committee for consideration.
- III. Recommends that Cabinet give serious consideration to continued prioritisation of data improvements and suggests it seeks a clear articulation of the benefits or this work (or risks of not doing it) and a more detailed explanation/justification of the estimated cost of continuing this programme.

Additional Recommendations:

- I. The select committee welcomes the upcoming Organisational Redesign (formerly the 'Core Function Re-design') and recommends that the service continues to report back to this select committee as it works toward the aim of producing a return on the significant investment in the 2027/28 financial year.
- II. The select committee recommends that analysis being undertaken to forecast possible demographic changes, including potential increases in Surrey's resident population, which includes housebuilding targets (NPPF changes) and other relevant information, is made available to the select committee, along with associated proposed changes to the planning framework, and recommends that these are factored into the revised MTFS modelling.
- III. The select committee recommends that it receive an update on vacant and part-vacant properties and sites in all portfolios (that are owned by SCC, companies owned by SCC, or where SCC is a shareholder) – including schools and office buildings - and related policies, usage strategies and practices, with detail on how determinations of retention or disposal are made in accordance with Best Value.
- IV. The select committee welcomes the recruitment controls in place and further plans to examine and implement changes to organisational structure – such as the “6 spans and 6 layers” work, as discussed in the *Workforce deep dive*, - and recommends that recruitment continues to be carefully managed through robust business cases and justifications to produce the best outcomes for council services.
- V. The select committee welcomes the procurement controls in place and the extensive work of the Procurement Board and recommends that the Board continues in its work and examines and analyses the management of contracts to ensure value for money, quality and sustainability of the service in all council contracts.

Fiona Davidson
Chair - Children, Families, Lifelong Learning and Culture Select Committee

Bob Hughes
Chairman - Resources and Performance Select Committee

Trefor Hogg
Chairman - Adults and Health Select Committee

Keith Witham
Chairman - Communities, Environment & Highways Select Committee

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Cabinet Response to the Interim Recommendations from Select Committees Following Budget Deep Dives and Budget Briefing Sessions

Communities, Environment and Highways Select Committee:

Deep Dive Capital Programme

- I. The Council's capital financing requirement trajectory presents too high a risk with regards to affordability and financial stability. Levels of borrowing need to be reduced.

Cabinet Response:

The Cabinet, the Corporate Leadership Team and the Capital Programme Panel have reviewed the Council's Capital Financing Requirement trajectory and undertaken a full and thorough review of the capital programme and pipeline allocations. As a result, the borrowing requirement has reduced significantly from the previously approved capital programme resulting in a significant reduction in the capital financing requirement forecast.

- II. Cabinet/Council should review its appetite for risk and set an appropriate limit for borrowing going forward. A risk policy should be put in place if it does not already exist. (This *might* prioritise most spend on projects which generate income or avoid future costs).

Cabinet Response:

A borrowing strategy, including the risks associated with it and limits to manage such risks, is included in the Councils' annual Capital, Investment and Treasury Management Strategy which is approved by Audit & Governance Committee and Full Council as part of the budget setting process each year. This strategy is also scrutinised by the Resources and Performance Select Committee.

- III. Cabinet should re-examine the process for prioritising Capital programmes in line with SCC strategic priorities to drive more ruthless investment decisions and ensure the right schemes are coming through the pipeline in future.

Cabinet Response:

As set out above, a thorough review of the capital programme and pipeline allocations has been undertaken in advance of the Draft Budget being proposed by Cabinet. This has included a line by line review of all capital projects to ensure alignment with Council priorities, the prioritisation of schemes that deliver ongoing revenue and a reduction in the overall borrowing requirement.

- IV. Capital spend on highways maintenance for improving the overall condition and safety should continue to be prioritised to reflect resident concerns and priorities.

Cabinet Response:

Cabinet notes the views of the Select Committee. The Draft Capital Programme includes significant investment in highways assets including the extension of the enhanced highways maintenance programme into 2026/27.

Deep Dive Bus Services & DDRT (Digital Demand Responsive Transport)

- 5
- I. Ongoing publicity and promotion of existing DDRT should be prioritised to increase numbers of passenger journeys to decrease the cost per passenger and increase value for money.

Cabinet Response:

Work is continuing to promote and publicise the existing network of Surrey Connect Digital Demand Responsive Transport Services, which offers a flexible transport option to an increasing number of residents across Surrey. The service has exceptionally high levels of customer satisfaction, and we will continue to prioritise our work to promote the services, grow patronage, and increase overall value for money.

- II. Consideration should be given to delay/deferring phase 3 rollout of DDRT. Alternative bus provision should be investigated, including commercial bus services that might receive a subsidy. DDRT should only be introduced as the provider of last resort where all other options are exhausted. The Department should encourage the use of a more hybrid model (including fixed journeys) rather than a completely bespoke service.

Cabinet Response:

Consideration has been given to pausing the introduction of Surrey Connect Phase 3 from September 2025. However, after due consideration, Cabinet has concluded that it remains committed to improving and enhancing a range of public transport options and that includes expanding the Surrey Connect network. This expansion, alongside other linked areas of work, will support residents access employment, our town and village centres, primary medical care and a wide range of other services and commerce that are vital to residents and communities. This approach will help us to ensure that no one is left behind.

Alongside this, we are maximising the use of County Council and Bus Service Improvement Plan (BSIP) funding. The Council already invests in many local bus services to help residents travel sustainably, and we are using BSIP funding to improve frequency and operational coverage too. This investment is being undertaken in partnership with our bus operators who are committed to taking a proportion of the financial risk, the aim being to maximise commerciality of provision once BSIP funding is exhausted. This work is being channelled through our 'Enhanced Partnership' that covers the whole of Surrey.

It should be noted that Surrey Connect already has the capability to operate on a fixed route where demand supports this. We therefore already operate a hybrid model of commercial and supported bus services, Surrey Connect Digital Demand Responsive Transport, community transport and third sector transport.

Children, Families, Lifelong Learning & Culture Select Committee:

Early Help Deep Dive

'Is early help prevention activity sufficiently well-funded to increase the wellbeing and life chances of the most disadvantaged Surrey residents in line with SCC's policy of no one left behind?'

The Children, Families, Lifelong Learning and Culture Select Committee:

- I. Notes that investing in early help – which is discretionary funding - does make a positive difference. There are indications that early help reduces the demand on statutory services in Surrey, i.e., the number of children going into care, and the number on Child Protection Plans*.

Cabinet Response:

Cabinet agrees with the select committee on the long-term value of early help support and with that in mind made the decision in the 2024/25 budget as part of the additional monies allocated through the social care grant to ensure this was targeted towards preventative and early help services.

- II. Believes investing more in preventive activities – such as easily accessed emotional wellbeing support for adolescents – would prevent young people's needs escalating, would contribute significantly to their wellbeing (and that of their families), and reduce the pressure on statutory services. Notes with regret there is no additional discretionary funding available to invest in prevention without making cutbacks elsewhere.

Cabinet Response: Cabinet notes the committee's view

- III. Since preventive spending is having a positive impact on both outcomes for children and reduced statutory demand, recommends that early help spending is protected, with inflationary costs built in. The Committee is convinced of the value that early help brings and Cabinet should factor this into its budget decision-making.

Cabinet Response:

Cabinet recognises the benefits of preventative services and has previously targeted funding to support those services and will protect those services where possible. However, Cabinet must also consider the difficult balance of setting a budget to meet the many statutory services in Children' services with an expected exceptionally difficult budget settlement.

**Cllr John O'Reilly would like to record his acknowledgment of SCC's successes in reducing the demand on statutory services in the county (i.e. the number of children going into care and the number of Child Protection Plans, contrary to the national trend).*

Voluntary, Community & Social Enterprise Deep Dive

'What is the likely impact on the infrastructure organisations – and on the organisations they support in the wider system - of the redistribution of funding, and can any negative impacts be mitigated?'

The Select Committee has withdrawn its recommendations in the light of new information on the impact of the proposals to withdraw funding from Surrey Community Action and redistribute it to other organisations. It will advise its recommendations following an investigation to clarify the situation, which is planned by the end of November.

Adults and Health Select Committee:

- I. The committee urges Cabinet to review the planned efficiencies and savings targets for FY 25/26 to be delivered via the Transformation Programme to ensure these are realistic and achievable.

Cabinet Response:

It is recognised that delivery of the efficiencies and saving targets in the financial year 2025/26 and beyond will be challenging. The plans for the transformation programme in 2025/26 have been robustly scrutinised. They focus primarily on the delivery of the opportunities identified in the recent diagnostic carried out by Newton Europe. They used a tried and tested methodology to identify opportunities for efficiencies based on data and insights and with engagement from across the Directorate, including front-line practitioners. The leadership team have now reviewed the findings and have developed a Directorate owned plan for delivery. This is being further tested and some assumptions refined to further ensure confidence in delivery. The delivery of the diagnostic internally will strengthen capabilities within the Directorate and mean the changes are sustainable.

In the meantime, transformation continues in 2025/26 and beyond through the Market Shaping and Commissioning programme. A longer term more sustainability approach is being implemented through the transformation of the models of care offered in Surrey, including the focused work on Community Opportunities for Everyday Living, the development of new models of housing with care and support, and expanding the use of technology enabled care solutions. Supported by focused work to deliver the Council's direct payment strategy this approach will ensure that people who draw on care and support services can exercise greater choice and control over their care and support arrangements, helping them to live more independently for longer.

- II. The committee acknowledges the challenges the transformation plan presents to the Adults, Wellbeing & Health Partnerships directorate (AWHP). Members of the committee have requested to be kept up to date on the delivery of transformation, ensuring key milestones are met.

Cabinet Response:

The Chair of the Select Committee, Cabinet Members and Executive Director will review the forward plan for the Select Committee to ensure that there is regular reporting on the progress of the transformation programme.

- III. The committee recommends a review of discretionary services in all areas across the directorate, ensuring they are aligned with key pressures on managing demand and delivering good outcomes. The committee expects to see evidence to demonstrate this.

Cabinet Response:

The AWHP directorate is conducting a review of all discretionary areas of expenditure that are designed to prevent demand for services to review performance and the extent to which services are mitigating more costly services, primarily care packages. The outcomes of this review will be considered as part of formulating AWHP's proposed final budget for 2025/26 and MTFs to 2029/30 which will be reviewed by Cabinet in January 2025 and Full Council in February 2025.

- IV. The directorate continues to prioritise joint working and integration ensuring that everyone gets best value and outcomes.

Cabinet Response:

The AWHP directorate continues to prioritise working collaboratively with its partners across the Integrated Care Systems and across Surrey as a whole.

Key examples of this joint working include:

- The Mental Health Investment Fund, which is an excellent example of a collaborative programme of work led jointly by the AWHP directorate and with partners in Surrey Heartlands ICB that has had made a real difference to health and wellbeing of many Surrey residents.
- The work the AWHP directorate continues to progress related to Surrey's Better Care Fund, working closely with partners across the VCSE sector and both Frimley and Surrey Heartlands ICBs to ensure that a holistic approach is taken to commissioning services and that no-one is left behind.
- The joining up of the Surrey-wide Health and Wellbeing Board and the Surrey Heartlands Integrated Care Partnership to create a truly partnership space to improve collective oversight, collaboration for strategic decision-making and streamlined governance.

Resources and Performance Select Committee:

Workforce Costs Deep Dive – The Select Committee:

- I. Recommends the model behind the Organisational Design Principles as well as their upcoming review.

Proposed Cabinet Response:

Cabinet notes and this recommendation is complete. The Organisational Design Principles have been updated.

- II. Recommends that the Cabinet agrees action plans for the implementation of the six 'spans and layers' and clarifies the changes and potential savings that this will deliver from the present configuration.

Cabinet Response:

The Organisational Design Principles include guidance on average spans and layers within the organisation. The principles will continue to be used to inform the design of staffing structures. It is not possible to state what savings may be achieved through reviewing spans and layers as this is just one of the factors considered when restructuring.

- III. Recommends that work continues to restrict the amount of agency staff at the council to ensure that the associated costs are reduced.

Cabinet Response:

Cabinet notes and agrees. The Corporate Leadership Team reviews every request to recruit, including for new agency workers or where an assignment needs to be extended.

Data Deep Dive - The Select Committee:

- I. Recommends exploratory work is undertaken into the possibility of implementing a 'golden single source of data' practice across the council.

Cabinet Response:

Cabinet agrees in principle that the recommended exploratory work being undertaken, with consideration given to timing in conjunction with existing priorities and resources.

- II. Recommends that work clarifying how the estimated investment costs of the programme were arrived at is shared with the select committee for consideration.

Cabinet Response:

Cabinet notes and this recommendation is complete. Investment and resource requirements for the Data team has already been shared as part of the deep dive as well as additional supplementary information that was shared on 4th October 2024.

- III. Recommends that Cabinet give serious consideration to continued prioritisation of data improvements and suggests it seeks a clear articulation of the benefits or this work (or risks of not doing it) and a more detailed explanation/justification of the estimated cost of continuing this programme.

Cabinet Response:

Cabinet notes and this recommendation is complete. Investment and resource requirements for the Data team has already been shared as part of the deep dive as well as additional supplementary information that was shared on 4th October 2024. This also included the risks of divesting in this area. Further work on benefit identification will be prioritised in line with wider transformation benefit improvements.

Additional Recommendations:

- I. The select committee welcomes the upcoming Organisational Redesign (formerly the 'Core Function Re-design') and recommends that the service continues to report back to this select committee as it works toward the aim of producing a return on the significant investment in the 2027/28 financial year.

Cabinet Response: Cabinet notes and agrees.

- II. The select committee recommends that analysis being undertaken to forecast possible demographic changes, including potential increases in Surrey's resident population, which includes housebuilding targets (NPPF changes) and other relevant information, is made available to the select committee, along with associated proposed changes to the planning framework, and recommends that these are factored into the revised MTFS modelling.

Cabinet Response:

Noted. The Core Planning Assumptions document is updated regularly by officers and scenarios produced. This can be made available to the select committee. The core planning assumptions are updated twice a year and budget modelling assumptions are updated more frequently, with monthly iterations discussed at the Corporate Leadership Team.

- III. The select committee recommends that it receive an update on vacant and part-vacant properties and sites in all portfolios (that are owned by SCC, companies owned by SCC, or where SCC is a shareholder) – including schools and office buildings - and related policies, usage strategies and practices, with detail on how determinations of retention or disposal are made in accordance with Best Value.

Cabinet Response:

Cabinet notes and agrees that an update will be provided.

- IV. The select committee welcomes the recruitment controls in place and further plans to examine and implement changes to organisational structure – such as the “6 spans and 6 layers” work, as discussed in the *Workforce deep dive*, - and recommends that recruitment continues to be carefully managed through robust business cases and justifications to produce the best outcomes for council services.

Cabinet Response:

Cabinet agrees. The Corporate Leadership Team considers every business case to recruit to roles and to extend existing fixed term and agency roles, ensuring robust control on recruitment to any roles which are not frontline, community-facing.

- V. The select committee welcomes the procurement controls in place and the extensive work of the Procurement Board and recommends that the Board continues in its work and examines and analyses the management of contracts to ensure value for money, quality and sustainability of the service in all council contracts.

Cabinet Response:
Cabinet agrees that the work of the Procurement Board will continue.

SURREY COUNTY COUNCIL**CABINET****DATE:** 26 NOVEMBER 2024**LEAD OFFICER:** ASMAT HUSSAIN, INTERIM DIRECTOR OF LAW AND GOVERNANCE**SUBJECT:** 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 delegated decisions taken since its last meeting as set out in Annex 1.

REASON FOR RECOMMENDATIONS:

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

DETAILS:

1. The Leader has delegated responsibility for certain executive functions to individual Cabinet Members and reserved some functions to himself. These are set out in Part 3, Table 2- Scheme of Delegation.
2. Delegated decisions are scheduled to be taken on a monthly basis and will be reported to the next available Cabinet meeting for information.
3. 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 Report

Sources/background papers:

None

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Cabinet Member Decisions

**CABINET MEMBER FOR PROPERTY, WASTE AND INFRASTRUCTURE DECISIONS –
29 October 2024**

1. DISPOSAL OF 2 COPSE EDGE, NEW INN LANE, GUILDFORD, GU4 7HS

Resolved:

The Cabinet Member:

1. Formally declared the asset surplus to operational requirements (in consultation with The Leader and Deputy Leader).
2. Approved the sale of 2 Copse Edge, New Inn Lane, Guildford, GU4 7HS to the party, at the price and subject to the conditions, noted in the Part 2 report. The sale is conditional upon the simultaneous surrender of the headlease held over the asset by HGR which has been agreed by the HGR Board.
3. Approved, in conjunction with the Leader, the acquisition of the leasehold interest held by HGR over the property at the premium noted in the Part 2 report. The premium for the surrender of HGR's interest is payable by the Council from the gross receipt with both parties bearing their own costs and appointments of their own professional team.
4. Delegates authority to the Executive Director, Environment, Property and Growth in consultation with the Director of Land and Property to finalise the transaction and enter into all associated legal agreements.

Reasons for decision

- Following an open marketing campaign of the vacant property known as 2 Copse Edge, New Inn Lane, Guildford, GU4 7HS terms have been agreed to sell the freehold interest to the party, and at the price, noted in the Part 2 report.
 - The asset was part of an early tranche of residential properties transferred by the Council to HGR in August 2020, with a premium paid by HGR to the Council for a head-leasehold interest. In accordance with the emerging Company Strategy to divest of certain assets, HGR have requested it be handed back to the Council and sold.
 - The Cabinet Member is asked to formally declare the asset surplus to operational requirement under the Council's constitution.
 - The property is not required for any operational purposes.
- 2. DISPOSAL OF THE BUNGALOW DEVELOPMENT SITE, (ROSE BUNGALOW, 2 PARKVIEW BUNGALOW, 3 PARKVIEW BUNGALOW, NORBURY PARK, MICKLEHAM, DORKING, RH5 6DN)**

Resolved:

The Cabinet Member:

1. Formally declares the assets forming the site surplus to operational requirements (in consultation with The Leader and Deputy Leader).
2. Approved the sale of The Bungalow Development Site, (Rose Bungalow, 2 Parkview Bungalow, 3 Parkview Bungalow and land at Norbury Park, Mickleham, Dorking, RH5 6DN) to the party, at the price and subject to the conditions, noted in the Part 2 report. The sale is conditional upon the simultaneous surrender of the headlease interests held over part of the site by HGR which has been agreed by the HGR Board.
3. Approved payment of the HGR premium for the surrender of its interest from the gross receipt with both parties bearing their own costs on the appointments of their separate professional team.
4. Delegated authority to the Executive Director, Environment, Property and Growth in consultation with the Director of Land and Property to finalise the transaction and enter into all associated legal agreements.

Reasons for decision

- Following an open marketing campaign of the vacant property known as The Bungalow Development Site, (Rose Bungalow, 2 Parkview Bungalow, 3 Parkview Bungalow and lands at Norbury Park, Mickleham, Dorking, RH5 6DN) terms have been agreed to sell the freehold interest to the party, and at the price, noted in the Part 2 report.
- The three bungalows were part of an early tranche of residential properties transferred by the Council to HGR in August 2020, with a premium paid by HGR to the Council for a head-leasehold interest. HGR have requested it be handed back to the Council to enable its disposal.
- The Cabinet Member is asked to formally declare the asset surplus to operational requirement under the Council's constitution as the property is not required for any operational purpose.

3. SURPLUS DECLARATION AND DISPOSAL OF LAND PARCELS A & B, BURPHAM COURT FARM, CLAY LANE, GUILDFORD

Resolved:

The Cabinet Member

1. Declared Surrey County Council's (The Council) landholdings comprising Parcels A & B at Burpham Court Farm, Clay Lane, Guildford formally surplus to operational requirements (in conjunction with the Leader and Deputy Leader).
2. Approved the freehold disposal of Parcels A & B to GBC as outlined in the Part 2 report.
3. Delegated authority to the Director of Land & Property in consultation with the Executive Director of Environment, Property and Growth, to finalise the best value transaction and conclude all associated legal agreement documentation.

Reasons for decision

Cabinet has previously endorsed rationalisation of the surplus estate and to enable disposals.

The assets comprise two nominal parcels of landlocked land, to be transferred to GBC to facilitate improved estate management and husbandry, and delivery of a SANG (suitable alternative natural greenspace).

4. SURPLUS DECLARATION AND JOINT MARKETING- LAND AT DEEPDENE AVENUE, DORKING

Resolved:

The Cabinet Member:

1. Formally declared the asset surplus to operational requirements (in conjunction with the Leader and Deputy Leader).
2. Approved the proposed joint marketing of the asset with the Surrey Police and Crime Commissioner under a Memorandum of Understanding to include governance controls and price sharing mechanisms
3. Delegated authority to the Director of Land and Property, in consultation with the Executive Director for Environment, Property and Growth to finalise a best value transaction and conclude all associated legal agreements.

Reasons for decision

Cabinet has previously endorsed rationalisation of the surplus estate. SCC owns a parcel of land that abuts the southeast of the A24/A25 roundabout at Dorking shown hatched in Annex 1 and comprising a landlocked parcel of approximately 0.19 hectares (0.46 acres). Although it immediately abuts the adopted highway there is no vehicular access onto the parcel given the constraints of the adjacent highway. There is no SCC operational use for the land.

Surrey Police and Crime Commissioner (Police) owns 3 adjacent houses and a further parcel of roadside land that controls access to SCC lands and in total comprises 0.85 acres. The Police land is surplus to their requirements, and they are seeking to market the property. Therefore, the opportunity has arisen to combine the SCC land with the Police land to market jointly and to enable the disposal of what would otherwise remain a SCC owned landlocked asset.

To enable the joint marketing and ultimate disposal, Cabinet is requested to formally declare the SCC's land parcel surplus to operational requirements under SCC's Constitution.

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Children's Social Care Update:

Progress in Children's Services: The Council's commitment to children's services through the Transformation programmes is delivering positive outcomes and fostering creative solutions. Our leadership team and staff are prepared and motivated to demonstrate the progress we have made and our commitment to supporting enhanced outcomes for children and families in Surrey.

- **Continuous Service Improvement Work:** Building on progress from the last ILACS in 2022 and subsequent positive JTAL in 2023 and the Focused Visit earlier this year, the Achieving Excellence forum has been identifying evidence of effective practice, strong partnerships, and driving staff engagement with our drive for continuous improvement.
- **Progress Since 2022:** We anticipate recognition from inspectors of our strengths, progress made, and innovation in key areas such as approaches to Pre-Birth assessment and planning, our recent work within the area of extrafamilial harm and the introduction of the Intensive Family Support Service. We also recognise that there are still things we must be better at doing and Achieving Excellence and other performance management forums are actively addressing these areas.
- **Improvement in Performance:** Remedial activity has led to improvement, an example being the sustained performance improvement in the Assessment Service, the consistently good performance across Looked After Children and Care Leaving and the very positive gradings given to most of our children's homes. Many KPIs across the system are now aligning with or exceeding benchmarks for "Good" statistical neighbours and national comparators. Sustainability is a tension across the system, but progress is evident month by month.
- **Focus Visit Feedback:** The Focus Visit earlier this year, which looked at our Child in Need and Child Protection interventions, identified areas of practice improvement and reinforced our understanding of the improvements made to service delivery.

Creation of the Intensive Family Support Service (IFSS): The IFSS is now operating, supporting families with interconnected needs. Through this service, the early help offer in Surrey is expanded to bridge the gap between existing targeted support and statutory services. It enables families to receive help in their homes and communities, accessing intensive and specialist support that meets their needs and avoids unnecessary escalation. Of note, there has been a reduction in statutory (Child In Need and child Protection) plans this year compared to last year. These could be early signs that investing in the intensive support service is reducing the demand for statutory services, however it is early days and requires monitoring. Feedback from all families supported by IFSS is sought during and following the period of support.

Rebranding of Early Help as Families First: Early help is a system rather than delivered by children's services or commissioned services through SCC The Early Help Partnership Board agreed to brand early help to reflect this and agreed on Families First as it has a national footprint in the Family Path finders. Families First principles; these are for organisations throughout Surrey to adopt and use in their work to enable there to be a consistent approach to supporting families and putting their needs first.

Adolescent Service: In Family Resilience & Safeguarding, the Targeted Youth Support Service and the Safeguarding Adolescent Service have been integrated and aligned with Police Areas, into North, East & West Adolescent teams. Additionally, the formation of a Central Hub to focus on the specific vulnerabilities of adolescents and their families experience to build capacity & expertise across the practice system and have a timely response for children in crisis.

Colleagues in the Police, Health & the Adolescent Service have been instrumental in developing cross-partnership evolution and change in the response to children experiencing extra familial harm & contextual safeguarding. This approach acknowledges that children's experiences are deeply influenced by their environments. By understanding the contexts in which they live, we can better identify and address the risks they face and ensure our interventions are effective and reduce harm.

The Adolescent Service supports and helps protect adolescent children and their families facing complex challenges and where extra-familial risks or harms are the key concern impacting safety. We recognise that adolescent children and their families require different responses, the Adolescent Service will work across targeted, intensive and statutory domains within the continuum of support, with a strong focus on preventing escalation. They will provide intervention where there are multiple and complex needs and the impact of which will increase their likelihood of entering care or custody or suffering extra-familial harm and where the adolescent is the primary concern.

Corporate Parenting:

Children's Residential Homes: Following the Capital investment of £34 million for expansion of our in-house Surrey children's homes capital portfolio and renovation development funding for two of our existing homes, 2023-2024 has been a busy year as we improved our practice and expanded the residential estate.

Over the past 3 years, Capital Projects have been working closely with Children, Families and Lifelong Learning (CFLL) strategy to deliver a portfolio of new children's homes and family contact centres, in accordance with the Corporate Parenting Strategy. Our children's homes are developing in line with the ambitions of the Surrey Sufficiency Strategy. This programme has seen the successful delivery of three brand new children's homes across the county, with two more coming on stream as well as our replacement home where the current building is no longer suitable.



Ofsted Outcomes: Across our estate of eleven registered children's homes, we are very proud of our stabilised and improved Ofsted ratings across SCC's portfolio, with all homes now being graded as Good and two Outstanding.

This reflects the great work that has been achieved with significant steps to improve our recruitment, retention and core practice within SCC-run children's homes. By focusing on recruitment and retention in SCC-run children's homes this has strengthened the children's residential workforce as a priority group under the Recruitment and Retention Transformation. This has enabled us to improve recruitment and reduce vacancy levels in this critical area of work, including the positive outcome that all active SCC owned and managed children's homes currently have permanent Registered Managers in post.

In addition to children's homes, SCC is also part-way through a capital programme to deliver 28 additional beds of care leaver accommodation in Surrey. The first four of these (four self-contained flats) went live in March 2024, delivered via an innovative partnership between SCC, Reigate and Banstead Borough Council, Homes England and a local registered social landlord. In addition, we have purchased three (with a further existing SCC property under consideration) of six planned shared houses as "move-on" accommodation through the Group Living for Care Leavers (GLCL) project.

Fostering improvement journey: The Foster Carers' Charter is a significant commitment from the Council (as Corporate Parent and the provider of the regulated Fostering Service) to the foster carers approved and supported by Surrey County Council. Based on principles developed by the Fostering Network, it sets out detailed expectations for how the Council and foster carers will work together to enable good quality care for children.

Fostering Delivery headlines

- Expansion of the **Mockingbird programme** to better support Surrey foster carers, through **DfE funding of £105k** we are expecting to have 5 constellations in place by December 2024.
- **Transformation funding** initiated Fostering Reviewing Officers & Support Workers, providing support to carers and children to stabilise placements & increase retention.
- **Promotion** of Kinship and Family first approaches including **strengthening our guidance and support offer** for families who are granted a Special Guardianship Order.
- **Recruitment:** Redesign of fostering website, increase of online digital marketing and partnership with **20 South-East local authorities** in creation of a **pilot recruitment hub through DfE funding**
- Creation of the **step-down project** within SCC, following on from the Big Fostering Partnership Social Impact Bond pilot.
- **Strengthened regional collaboration** through the South-Central Independent Fostering Framework, and active engagement with Nationwide Association of Fostering Providers (NAFP).

- Improved **relationships with independent fostering agencies** through a new provider forum, and increased individual engagement to try to identify innovative ways of working

Promotional fostering video: [Everything - A Fostering Film \(2024\)](#).

The fostering film premiere and information session **‘Everything’ launched on 14th November**. It was launched nationally in October. Fostering can mean everything to those involved; that is the message of a powerful new fostering film from over 100 councils. In Surrey, our ambition is for at least 30 new foster families across the county to join us by the end of March 2025, and this event is part of our plans to achieve that.

The ‘Everything’ project shows the long-term impact that fostering can have, with relationships between carers and children lasting well into adulthood. Every council wants to recruit more foster carers, and by collaborating to produce this emotionally powerful film, we can show people how rewarding and life-changing being a foster carer can be.

Care Leavers Covenant: In March 2023 Surrey Signed the Care Leaver Covenant - a national inclusion programme that supports care leavers aged 16 to 25 to live independently, funded by the Department for Education (DfE) and encourages local authorities, voluntary organisations and private sector businesses to sign up and make pledges to support care leavers in England.



As a Partner of the Care Leaver Covenant, we have agreed to support and facilitate the Covenant's primary aim, by promoting opportunities and offers to care leavers and raising awareness of the Care Leaver Covenant amongst our networks. Importantly, we understand our organisation's role as part of a universal family in which care-experienced young people can benefit from our support in making a successful transition to adulthood.

Since signing the Care Leaver Covenant, we have consulted with care leavers to develop a set of six priorities to be implemented through phase one, which include:

1. Raising awareness of the Care Leaver Covenant
2. Increasing education, employment and training opportunities
3. Creating more opportunities for care leavers through [Social Value](#)
4. Developing more discounts to help care leavers financially
5. Better health and wellbeing support and provision
6. Embracing a Whole Local Authority approach and promoting [Corporate Parenting Board](#) responsibilities.

Some examples of these priorities we have achieved so far:

The Local Offer - A dedicated external webpage is now available with up-to-date progress and information for CYP, practitioners & external audience [Surrey local offer for care leavers - Surrey County Council](#).

Surrey Heartlands (NHS) has a process to recruit up to 25 care leavers with support from Career Matters.

Offer pre-paid prescriptions for care leavers on low income or those with medical issues.

Each Care Leaver receives an air fryer from Corporate Parenting as a gift as they embark on living independently; Upon signing their first tenancy agreement, this ‘cost of living’ project is funded entirely through sponsorships and donations from local businesses and social value schemes.

Social Events: The CPB sponsors annual events where members, DCS and Senior officers champion and support by volunteering at these important annual events.

We rely entirely on sponsorship and donations to fund such events, largely through Social Value from our many suppliers. We had fantastic sponsorship from our many suppliers to make this year's event's both possible and memorable.

The Children's Summer Event – A family fun day for all Surrey's Children Looked After & foster families including foster carers own birth children/grandchildren, as well as CLA in our residential children's homes. The annual summer event is held in July for all our CLA of all abilities and brings together our families with emphasis on appreciation to all our foster carers.



The popular event had many fun activities for children including the all-important fire engine, a climbing wall, reptiles for those brave enough and our much-loved therapy dog, Bertie! Foster carers enjoyed a relaxing wellbeing area to unwind and network with other foster carers, whilst the tombola proved to be a big hit with every child winning a prize!

Care Leavers event - In support of National Care Leavers Week, Corporate Parenting and the Leaving Care service held an event in celebration of our Care Leavers. Providing information on higher education from Surrey University, work experience, training and apprenticeship opportunities from the NHS and Ringway Highway services as well as mentoring support information from Goal 17. In addition to the many activity stalls was the all-important raffle. This proved to be another successful event.

SEND Update:

Ofsted/CQC Improvement Plan – progress update

Despite a slight reduction in new EHC needs assessment requests, the total number of EHCPs continues to rise, reaching 15,818 in October 2024. Surrey's Additional Needs and Disabilities Partnership Improvement Plan, developed in response to the 2023 Ofsted/CQC inspection, focuses on six key areas. The plan aims to address inconsistencies in SEND service experiences across Surrey, enhancing support through clear actions, evaluation, and collaboration with families and partners.

Impact and Outcomes:

- Strengthen strategic evaluation to measure impact on children and young people's outcomes.
- Actions include developing an evaluation framework, a toolkit for practitioners, and revising KPIs for systematic monitoring. The goal is to hold partners accountable for measurable improvements.

Communication and Relational Working:

- Improve communication with parents and carers to foster trust and inclusion in decision-making.
- Actions include creating a new communication plan, co-production of clear protocols, and training staff on relational practices to enhance family involvement and satisfaction.

Waiting Times and Quality:

- Reduce delays in health assessments, needs assessments, and EHCPs, ensuring timely support.
- Actions include implementing an EHCP recovery plan, improving health assessment wait times, refining the neurodevelopmental pathway, and establishing a quality framework for EHCPs.

Alternative Provision (AP):

- Review and expand the alternative provision offer to better meet students' needs and ensure minimum levels of provision.
- Actions involve enhancing AP capacity (see section below on capital and AP), monitoring provider quality and levels of provision to individual pupils, and improving inclusion strategies to prevent placement breakdowns, with AP provision aligned to EHC plans and tracked for effectiveness.

Governance and Accountability:

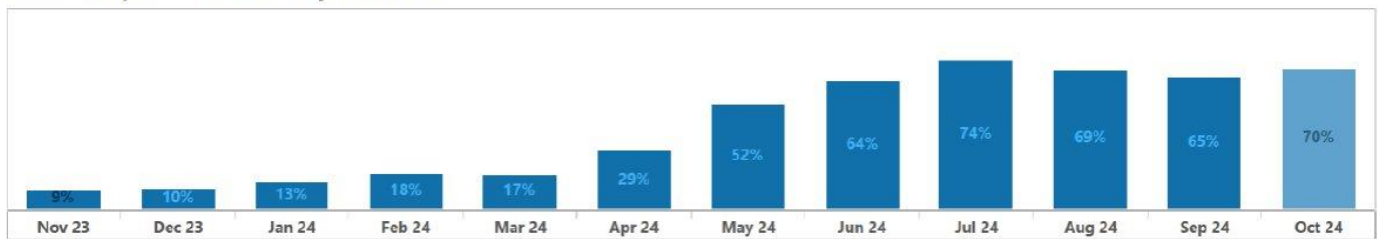
- Strengthen governance to support improvement and accountability.
- Actions include revising governance structures, monitoring action progress via a dashboard, and establishing mechanisms for feedback from families and stakeholders.

The improvement plan, which has been enhanced by two additional priorities from the AND strategy relating to inclusion (in mainstream schools and in the community) and the development of early intervention and support for children with AND, is currently on track.

The EHCP recovery plan has improved the timeliness of EHCNAs and annual reviews, health have improved waiting times for therapies, and the quality of EHC plans is also improving. Our alternative provision offer has been strengthened through a new contract with providers, and fewer young people are receiving less than 15 hours provision. Our work on communication and relational working with families still has some distance to go to address the shortfalls identified in the inspection, but this remains a priority area and focus for improvement. SCC is due to report progress to the DfE in January 2025.

EHCP Recovery Plan Progress: In October of this year, we issued 70% of EHCP's within the statutory 20-week timeframe and have completed the backlog of all overdue assessments that had built up prior to May this year. We aim to maintain an average of 70% for the remainder of the Autumn term.

EHCP Completed on-time - by Issued Date



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We experienced a slight dip in timeliness in August and September due to the impact of school closures over the summer, which limit the ability of schools to provide assessment information and complete consultation for school places and Educational Psychologists to visit schools to undertake assessments and provide timely advice.

Work continues to reduce the backlog of overdue annual review actions. As of the 4th of November, 75.8% of all annual reviews were up to date, compared with 25% in July 2023. Annual reviews of vulnerable learners continue to be a priority with 84% of now up to date. We have already reached the target of 75% of all annual reviews being up to date by December 2025 and continue to work to sustain and build upon this alongside reaching our target of 100% of vulnerable learners' reviews being up to date by the end of December.

Quality of EHCPs remains a key point of focus for the SEND teams with a nationally recognised audit tool being used to quality assure new plans monthly. The majority of plans issued in September 2024 were (86%) satisfactory and accurately describe need and education provision required to meet need, with 56% of all plans receiving a good or outstanding grade in September 2024. The target of achieving 50% of EHCPs with good and outstanding judgements for all sections of an EHCP by end of December has now been met.

This work has been supported by a £15m investment which has enabled additional staff to complete the backlog of statutory work and develop early intervention support. The enhanced early intervention offer alongside clearer guidance for schools and parents about the resources schools should ordinarily provide without requiring an EHC needs assessment has led to an overall reduction of 5% in requests for assessment last academic year when compared to the year before.

SEND Communication: While EHCP statutory work is now being completed at performance levels above national averages, there continues to remain concerns around communications from the SEND teams. This typically reflects staff capacity to promptly respond to parents and schools and there has been an end-to-end review of the EHCP process which includes ensuring more efficient processes which will build capacity and a business case for additional core staffing to enable more time for proactive, person-centred communications.

There is a communications protocol in place in the SEND teams which has been scrutinised by the audit team, which sets the expectations for returning emails and telephone calls, out of office messaging and case-holding hand over communications.

A SEND communications team has been established to receive and manage calls from parents and schools and to undertake proactive communications. This remains a key area for improvement and work continues at pace.

Surrey's Safety Valve Agreement: The Safety Valve Agreement is a financial arrangement between the Department for Education (DfE) and local authorities with significant Dedicated Schools Grant (DSG) deficits. It aims to support these authorities in reducing high needs funding (HNF) pressures through a structured plan to achieve sustainable budgets, with the DfE providing additional funding on the condition that specific cost-reduction and system-change targets are met. In Surrey's Safety Valve Agreement with the DfE, the key components include: Deficit Reduction Targets, Increase in Local Provision, Enhanced Early Intervention, Support, and Inclusion Initiatives, Cost-Containment and Efficiency Measures and Regular Monitoring and Reporting.

This agreement seeks to help Surrey create a sustainable funding model for high needs support, while also ensuring efficient use of resources and increased local capacity for SEND services. Surrey has challenges meeting our Safety Valve financial targets due to continuing increased need and demand, rising placement costs, delays in additional specialist provision coming on-line, and a range of external issues. Key contributing factors include: Rising EHCP Demand, High NMIS Use, Rising Costs, Tribunal Pressures, Alternative Provision and Lagging Cost-Containment Efforts

New Risks in 2025 are the potential increases in independent school fees due to VAT changes, loss of charitable status, and higher National Insurance contributions for school staff all of which may drive more EHCP applications and raise costs further.

Special Educational Needs and Disabilities (SEND) and Alternative Provision (AP) Capital Programmes Update: Surrey County Council's SEND and AP capital programmes (2019/20-2027/28) are aligned with the county-wide adopted Inclusion and Additional Needs Partnership Strategy objectives and sufficiency plans, national reform, Surrey's Safety Valve Agreement with the Department for Education, and evolving local area improvement plans to best meet the needs of Surrey resident children with additional needs and disabilities in the long term.

Highlights: As of November 2024, 49 of 81 construction projects have been completed, with 32 projects remaining to complete by 31 August 2028 and £94.2m investment to date.

- Nine SEND construction projects and one AP construction project are in contract on school sites.
- 12 committed construction projects are in development and progressing to target milestones, of which four are due to have planning applications determined between November and December 2024.
- 10 committed construction projects are planned, of which three are deliverable by the Department for Education's central route Special Free Schools Programme, awaiting Ministerial 'value for money considerations' reported by Secretary of State for Education on 22 October 2024.
- The capital programmes created [More than 260 new specialist school places for Surrey's children with additional needs and disabilities](#) for academic year 2024/25, increasing Surrey's maintained specialist education estate by 35% from around 3,320 places when the programmes started in 2019 to approximately 4,500 places now.
- The programmes remain on track to complete a further 170 additional places for academic year 2025/26.
- After two years of hard work, planning and development, in partnership between Surrey County Council (SCC) and Bourne Education Trust with Freemantles School in Woking, the Department for Education Regions Group and Ofsted, Hopescourt School, Surrey's flagship Net Zero Carbon Special Free School opened on its temporary site in September 2024 and works started on the permanent site in November 2024. The temporary location in West Molesey will serve as home for Hopescourt School until the permanent site in Walton-on-Thames is completed in Spring 2026.

Hopescourt School in Walton-upon-Thames: Value £28m



Image of construction vehicles working on stripping the site's topsoil and ground-cutting on Hopescourt School's permanent site in Walton-upon-Thames

Recent Handovers:

Stepgates Community School SEN Unit expansion: Value £2.26m (29 place accommodation and primary provision for children with complex speech, language and communication needs aged 4-11 years)



Image of the exterior of the new timber clad three classroom SEN Unit block at Stepgates Community School nearing completion in Chertsey.

St Matthews CofE Primary School SEN Unit expansion: Value £1.8m (13 place accommodation and primary provision for autistic children aged 4-11 years)



Image of the SEN Unit block and the new all-weather external play and gardening areas at St Matthews Church of England Primary School in Redhill.

Freemantles School special school satellite site, Ripley campus: Value £1m (54 place accommodation and infant provision for autistic children aged 4-7 years with co-occurring severe learning difficulties)

Woking High School SEN Unit expansion: Value £1.78m (20 place accommodation and secondary provision for students aged 11-16 years with visual impairments)

The Abbey School expansion: Value £7.43m (Weydon Multi Academy Trust delivery under Self-Delivery Contract: 60 place accommodation and secondary provision for students aged 11-16 years with moderate learning difficulties and co-occurring needs including autism and speech, language and communication needs)



Image of the new sports hall, changing rooms and teaching block extension, linking to the existing school building at The Abbey School in Farnham

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Philip Southcote School special school satellite site at Epsom & Ewell High School: Value £1m (20 place accommodation and secondary provision for 20 students aged 11-16 years with moderate learning difficulties and co-occurring needs including autism and speech, language and communication needs)

Bramley Oak Academy condition and suitability works: Value £2.65m (Creating fit for purpose accommodation for 61 children aged 5-11 years with Social, Emotional and Mental Health Needs prior to expansion)

In Contract: Ten further construction projects are underway on school sites, which will provide permanent accommodation for 373 new specialist places and improve 109 existing places in schools across Surrey.

Alternative Provision Schools

Fordway Centre rebuild in Ashford: Value £6.36m



Image of the crane in position lifting the prefabricated roof panels from the ground to the roof at Fordway Centre in Ashford.

Specialist Schools

Walton Leigh School in Hersham: Value £0.95m

Woodfield School in Merstham: Value £8m



Image of the new 6th Form block at Woodfield School with external landscaping completed in Merstham

Pond Meadow School in Guildford: Value: Value £7.3m

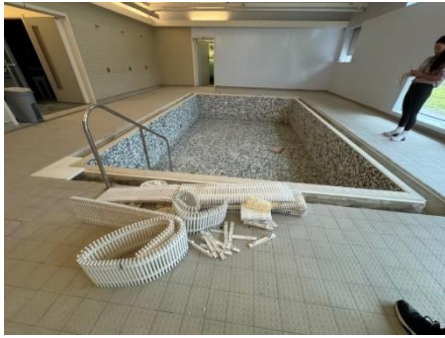


Image of the latter stages of the works to the hydrotherapy pool area at Pond Meadow School in Guildford which included new floor tiles, new UPVC panels to the walls and new showers, as well as painting and decorating throughout

Philip Southcote School in Runnymede: Value £11m

Specialist provision in Mainstream Schools

Ashford Park Primary School in Staines: Value £3.14m

Dovers Green Primary School in Reigate: Value £2.73m

Epsom Downs Primary School in Epsom: Value £3m

Guildford County School in Guildford: Value £3.33m

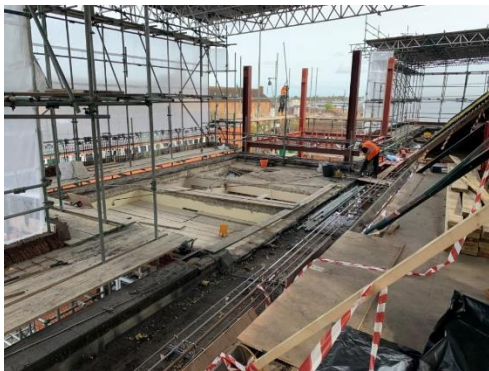


Image of the steel columns that form the structure of the new courtyard infill for first and second floor classrooms at Guildford County School in Guildford

Home to School Travel Assistance (H2ST): The team's Summer Review was highly successful, primarily due to a structured approach to the summer tendering process. This methodology enabled officers to be assigned schools earlier than in previous years and facilitated the timely setup of transport arrangements. As a result, on the first day of term, all under-16 transport applications submitted by the July 31 deadline were confirmed. Additionally, only one post-16 application where transport arrangements were required remained outstanding, which was attributed to the absence of a named placement on the Education, Health and Care Plan (EHCP).

During the peak summer period and into the new academic year, the team has consistently met its application SLAs while ensuring that communication remains clear and timely. Notably, they have successfully delivered confirmation of transport arrangements at least seven days prior to the start of the term for families who applied before the 31 July deadline. Where they were unable to set up transport in time due to a late application submission families were offered a Personal Travel Budget.

H2ST Communication strategies have undergone significant enhancements, emphasising clarity and responsiveness:

- **Enhanced Family Communication:** Families received timely and clear communications at least seven days prior to the start of each term, effectively reducing uncertainty and minimising complaints.
- **Stakeholder Engagement:** Regular interactions were introduced with key stakeholders, including Family Voice Surrey and ATLAS, ensuring their feedback was integral to service improvements. The introduction of one-on-one sessions with families marked a first for the service and yielded positive outcomes.
- **Website Updates:** Continuous updates to the website have streamlined access to accurate and timely information for families, significantly decreasing the volume of direct inquiries.
- **Rapid Response Times:** The team has improved response times to queries from families, members, and internal colleagues, contributing to a notable reduction in complaint volumes and calls.
- **Interdepartmental Collaboration:** Enhanced communication between departments has led to improved coordination and service delivery.

The enhancement in communication is evidenced by the volume of calls received by the Contact Centre regarding Transport. During the peak period from mid-August to mid-September, it was observed that there was a significant reduction in calls, with a decrease of 27% compared to the same timeframe last year. From the end of Sept increased call volumes had reduced to normal 'non-peak' levels. This again was earlier than in previous years.

H2ST Complaints: Complaints have continued to be much lower than at the same time last year – this is due to the improvements in communication combined with the team meeting the SLAs for service delivery. For the period Aug-Oct 24 (when most Complaints and Enquiries arise) there was a 57% reduction in complaints and a 28% reduction in enquiries compared to the same period the previous year.

H2ST Financial position: The 2024/25 forecast outturn position has improved in month 7, with the reported pressure reducing by £0.4m to £7m and the reported risks reducing from £1.8m down to £0.3m. The forecast includes provision for further growth in pupils and rates through to the end of the year.

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Family Voice Survey: The team have worked with Family Voice to survey the experiences of families with children with SEN needs. This survey went live on 21st October for 4 weeks.

SSTAT Parent Survey: The team has developed a survey to gather feedback from parents regarding their experiences with the Surrey School Travel & Assessment team. This survey will remain open until 6th December, and the insights gained will be utilised to enhance the service continually.

Expansion of Early Years Entitlements: As from September 2024 all children from the age of 9 months to school age are now entitled to 15 hours per week funded Early Education.

In Surrey as of this week 8283 codes have been issued to Surrey families. This exceeds the number previously estimated by the Department for Education (DfE). The Early Years Teams are supporting the sector to expand to accommodate the increased demand and to ensure the quality of provision and to support the sector to be inclusive. At the moment there are sufficient places for families to access their entitlement. Surrey County Council is providing grant funding opportunities to further expand the sector to meet the increased demand when the next phase of the expansion is launched in September 2025 when the entitlement increases to 30 hours per week. This is in addition to the capital funding that DfE have announced for schools to develop Early Years provision.

The Early Years Teams have a key focus on supporting children with additional needs and disabilities and our Early Years sector are telling us that this support is highly valued. We are tailoring our future support to ensure that our youngest children have access to good quality, inclusive education in their local community with access to additional funding and resources when needed.

Adult Education:

Learner participation: 8,100 adults participated in one of Surrey Adult Learning's 850 courses across the seven centres or in remote learning in 2023/24 which was 500 more than the previous year. The Autumn term participation levels in 2024/25 are the same as 2023/24. In the last year, but there has been an increase in ESOL, maths and English learners learning for a qualification from entry level to GCSE. A digital dippers course has started in Staines for learners who were registered with the DWP. Initially it was for learners over the age of 50 but this year has expanded to any learner over the age of 19.

Supported Learning Awards Ceremony: In September, we held an awards ceremony for supported learners who gained an entry level award for learning, employability and progression into employment or further training.



Gordon 'I really enjoyed the course; my tutors were great. I would like to work in a café as I like serving and speaking to customers. I have enrolled on other courses and am continuing to look for a job in a café.'

GCSEs: SAL learners had a 95% achievement rate in their English GCSEs. This was up from 93.5% in the previous year and well above the national average of 77.2%. In maths, SAL learners' achievement rate of 96% was up from 91% and 15% above the national average of 81%.

Attendance rates in GCSEs for English and maths and matches the national average. Attendance is a focus for Ofsted and there is a priority to increase attendance levels

and improving the understanding of reasons behind non-attendance. Adult learners have many other responsibilities such as employment and family commitments which can override learning.

Apprenticeships: SAL's apprentices' achievement rate was 79.1%, up from 70.4% in the previous academic year.

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SURREY COUNTY COUNCIL**CABINET****DATE: 26 NOVEMBER 2024****REPORT OF CABINET MEMBER: TIM OLIVER, LEADER OF THE COUNCIL****LEAD OFFICER: ANDY BROWN, DEPUTY CHIEF EXECUTIVE & EXECUTIVE DIRECTOR OF FINANCE & CORPORATE SERVICES (S151 OFFICER)****SUBJECT: 2025/26 DRAFT BUDGET AND MEDIUM-TERM FINANCIAL STRATEGY TO 2029/30**

ORGANISATION STRATEGY PRIORITY AREA: NO ONE LEFT BEHIND / GROWING A SUSTAINABLE ECONOMY SO EVERYONE CAN BENEFIT / TACKLING HEALTH INEQUALITY / ENABLING A GREENER FUTURE/ EMPOWERED AND THRIVING COMMUNITIES / HIGH PERFORMING COUNCIL

Purpose of the Report:

The Council has a statutory duty to set a balanced budget in advance of each financial year. The Final Budget for 2025/26 will be presented to Cabinet in January 2025 and Full Council in February 2025.

This report and the attached 2025/26 Draft Budget and Medium-Term Financial Strategy to 2029/30 sets out progress towards delivering a balanced budget. It is good practice to set out in advance the draft budget to allow consultation on, and scrutiny of, the approach and the proposals included.

Key Messages:

The Local Government financial climate is extremely challenging. The national picture for public services is one of constrained financial resources. A number of local authorities, across the Country, are struggling to balance available funding with significantly increasing demand and cost pressures.

The Council is experiencing the pressures felt across the country and the financial environment in which we operate requires us to make challenging decisions about the services we provide. The Council ended 2023/24 with a small overspend, which necessitated the use of reserves to balance the financial position, for the first time in a number of years. Moving forward, the current financial year budget requires the delivery of £54m of efficiencies and while we are making good progress against this target, in-year pressures, specifically in relation to adult's and children's social care placements and Home to School Travel Assistance, mean we are currently forecasting an overspend for 2024/25.

The Council's financial position is anticipated to remain challenging over the medium term. While many of the demands we are experiencing are not unique to this Council, we cannot rely on Government, or our partners, to solve the issue for

us. We need to reduce our costs and take difficult decisions in order to ensure our ongoing financial resilience. Being realistic about our ambitions, underpinned by an earned confidence in our ability to deliver efficiencies, will enable us to continue to deliver the Council's priorities.

A focus on financial resilience is crucial and part of the strategy will be to ensure we have adequate reserves to ensure we can transform, alongside making sure we provide for any changes to funding or unexpected effects on costs.

The Council will continue to maintain a strong focus on financial accountability across the organisation to ensure we can both protect and continue to drive improvements in our vital services and ensure No One Left Behind.

On 30 October 2024 the Chancellor of the Exchequer, delivered her first Budget Statement before the House of Commons, setting out the Government's fiscal rules and policy decisions on taxation and spend.

Government figures indicate an average increase in Core Spending Power (CSP) of 3.2% in 2025/26 nationally. A significant proportion of this increase comes from the presumption that all councils will levy the maximum increase in council tax permitted. Announcements included £1.3 billion of additional grant funding for local authorities, including at least £600 million for social care. The amount that the Council will receive is heavily dependent on the distribution methodology and formula adopted in determining individual authority allocations.

Government also announced increases to both Employer National Insurance Contributions and the National Living Wage (NLW). Both of these were higher than the existing assumptions in the budget and will lead to increased cost pressures, increasing the budget gap. The rise in the NLW will increase the Council's own wage bill as well as that of many of our suppliers, which will feed through into increased costs, widening the budget gap. Funding for the impact of the increase in National Insurance contributions for local authorities was announced simultaneously, although there are no details on how this funding will be made available. There remains a risk that funding is not sufficient to offset the increase in the Council's wage bill experienced through this change.

While the announcements gave us some indication of the funding that will be made available to Local Authorities in 2025/26, the first opportunity to understand in detail the direct impact of funding arrangements for the Council will be with the provisional Settlement itself, which is expected in late December 2024, with a final settlement in January 2025. Until this is available, significant uncertainty on funding remains, with little expectation of any major changes from the funding available in the current financial year, or certainly not enough to fill the forecast budget gap.

Revenue

Although good progress has been made over the last few months, at the point of publication there remains a provisional budget gap for 2025/26 of £17.4m, driven primarily by the need to maintain the delivery of priority services experiencing increasing demand pressures and higher than inflationary price increases.

The Draft Budget assumes a Band D rate increase of 2.99% on the core Council Tax. This would result in an annual Council Tax increase of £52.58 for Band D properties. The proposed increase is currently below the anticipated maximum allowable by Government without the requirement to hold a referendum. Decisions to increase Council Tax are not made lightly and balance the need to provide sustainable services for the most vulnerable, with a recognition of the pressures on household finances, particularly during times of increased cost of living.

Further actions will therefore be required to close the gap, which will be extremely challenging, given the level of pressure forecast, and may require the Council to postpone some activity that contributes directly to the achievement of our ambitions. The level of Council Tax raised, will be dependent upon progress in identifying further efficiencies and in part upon the Local Government Finance Settlement in December, and confirmation of District and Borough Council Tax Bases in January.

In addition, there are a number of significant risks to the Draft Budget position. The in-year financial position is challenging, specifically in relation to the significant costs increases in children's and adults social care placements and Home to School Travel Assistance. Any increase in these pressures for 2024/25 will have an ongoing impact on the 2025/26 budget and the medium-term financial strategy.

Capital

Over recent years the Council's capital ambition and delivery has grown significantly. Our aspirations remain high and the Draft Capital Programme for 2025/26 – 2029/30 proposes ongoing investment in priority areas such as highways infrastructure, improving the condition of our property estate, flood alleviation schemes, creating additional school places including for children with special educational needs and disabilities, the green agenda, transforming our libraries and investing in adult social care accommodation with care and support.

The challenge of developing an affordable capital programme that effectively delivers the Council priorities has grown. Despite our continued ambitions, the economic environment has changed over recent years. The recent high inflation environment and increases to interest rates have made the delivery of capital schemes more expensive and have increased the cost of financing borrowing. In order to sustain our financial resilience, we have re-set our capital expenditure approach, significantly reducing the proposed capital borrowing requirement, to ensure the affordability, proportionality and sustainability of our capital programme in the medium term.

Medium Term Position

The medium term budget pressures are expected to continue to grow. In addition, changes as a result of a Funding Reform are likely to have a significant impact and increase the Council's reliance on Council Tax. The Council recognises that tackling these challenges will require a medium-term focus, meaning we need to not only look to close the residual gap in 2025/26, but simultaneously look to address the medium-term horizon.

Recommendations:

It is recommended that Cabinet:

1. notes the 2025/26 Draft Budget and Medium-Term Financial Strategy to 2029/30, including progress to date in setting out spending pressures and efficiencies, as set out in Annex A.
2. notes the provisional budget gap of £17.4m for 2025/26 and the next steps required to close the gap.
3. notes the proposed Draft Capital Programme for 2025/26 to 2029/30 of £1.4bn set out in Section 6 of the report and Annex B
4. notes the summary of Resident Engagement and next steps set out in Section 9 of the report.

Reason for Recommendations:

In January 2025, Cabinet will be asked to recommend a Final Budget for 2025/26 to full Council for approval in February. The draft budget sets out proposals to direct available resources to support the achievement of the Council's corporate priorities, balanced against a challenging financial environment, giving Cabinet the opportunity to comment on the proposals and next steps.

Executive Summary:

1. The Draft 2025/26 Final Budget Report and Medium-Term Financial Strategy to 2029/30 and supporting Annexes set out the context (both internal and external), approach and assumptions underpinning the development of the budget.

Consultation:

2. Section 9 of the Draft Budget sets out the consultation undertaken to date and plans for further consultation between now and approval of the Final Budget.

Risk Management and Implications:

3. The attached report and annexes have been prepared with a view to risk management from a financial, operational and reputational perspective. The financial risk implications are set out throughout Section 5 (Financial Strategy and Draft Budget 2025/26) of the attached document and exemplified in the S151 commentary below.

Financial and Value for Money Implications:

4. The attached report considers financial and value for money implications throughout and future budget reports will continue this focus.

Section 151 Officer Commentary:

5. The Council continues to operate in a very challenging financial environment. Local authorities across the country are experiencing significant budgetary pressures. Surrey County Council has made significant progress in recent years to improve the Council's financial resilience and whilst this has built a

stronger financial base from which to deliver our services, the cost of service delivery, increasing demand, financial uncertainty and government policy changes mean we continue to face challenges to our financial position. This requires an increased focus on financial management to protect service delivery, a continuation of the need to deliver financial efficiencies and reduce spending to achieve a balanced budget position each year.

6. In addition to these immediate challenges, the medium-term financial outlook beyond 2024/25 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 the stable provision of services in the medium term.
7. The Council has a duty to ensure its expenditure does not exceed the resources available. The Section 151 Officer confirms that the Draft Budget has been based on reasonable assumptions, taking into account all material, financial and business issues and risks at the time of preparation.

Legal Implications – Monitoring Officer:

8. The draft budget does not constitute final approval of policies or sums of money to be saved under the service proposals. The proposed draft revenue budget and capital programme in the report do not commit the Council to implement any specific efficiency proposal.
9. If the Cabinet is required to consider making specific decisions on efficiencies, focussed consultations and the full equality implications of implementation will be considered in appropriate detail. If it is considered necessary, in light of equality or other considerations, it will be open to those taking the decisions to spend more on one activity and less on another within the overall resources available to the Council.

Equalities and Diversity:

10. Where appropriate, Equality Impact Assessments have or will be undertaken to assess the efficiency proposals set out in budget, along with any further measures that emerge as part of closing the draft budget gap. Proposals will only be implemented once Members have actively paid due regard and considered all possible actions and mitigations to achieve the aims of the Public Sector Equality Duty, namely the need to:
 - Eliminate discrimination, harassment, victimisation or any other conduct 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.
11. A report on the cumulative equality implications of the efficiency proposals to identify multiple impacts on the same groups, as well as individual Impact

Assessments for proposals that need them, will be presented to Cabinet in January.

What Happens Next:

12. Section 10 of the report sets out detailed next steps; in summary they are:

- Review income and funding assumptions - particularly in light of the Local Government Finance Settlement;
- Ensure that reserves and contingencies in the 2025/26 budget are set at the appropriate levels, reflecting the current high-risk environment and providing resilience to deal with continuing uncertainty, specifically around the economy, policy changes and inflation;
- Review the Council's level of reserves, recognising the need to balance ongoing financial resilience with ensuring funds are put to best use.
- Consider further Council Tax rises, balancing the need to provide sustainable services for the most vulnerable with a recognition of the pressures on household finances.
- Review Directorate budget envelopes for further efficiencies; and
- Continue to review opportunities and drive further cross cutting efficiencies.

13. The Final Budget Report will include a number of additional sections including the statutory requirement for the s151 officer to comment on the robustness of the estimates made for the purposes of the budget calculations and the adequacy of the proposed financial reserves (known as a Section 25 report). In addition, the Final Budget will include the formal approval of the Council Tax Requirement for 2025/26 and the Capital, Investment & Treasury Management Strategy.

Report Author: Andy Brown, Deputy Chief Executive and Executive Director of Finance & Corporate Services, andy.brown@surreycc.gov.uk

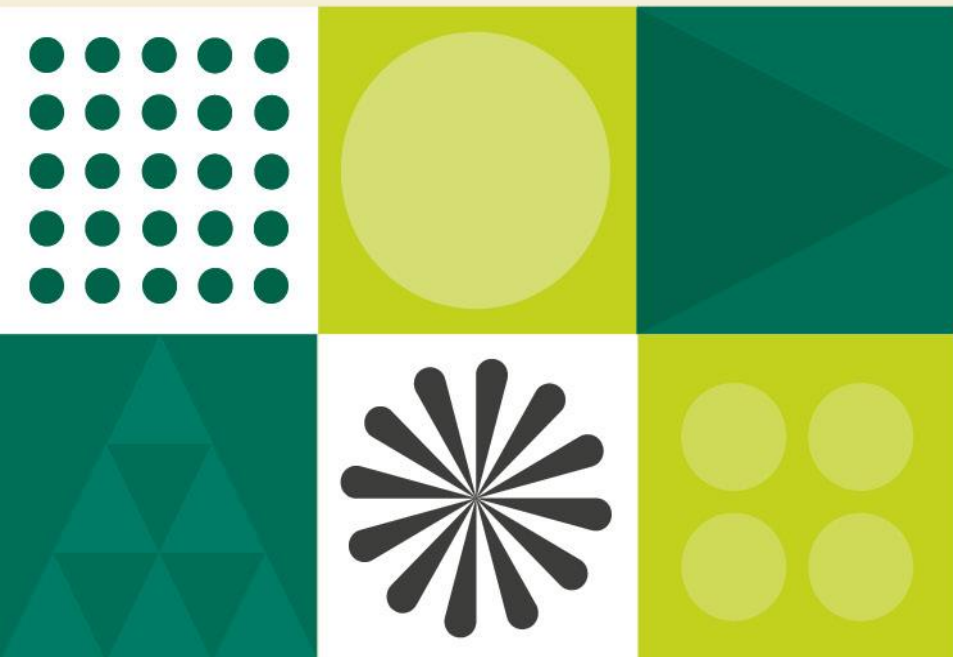
Consulted:

Cabinet, Executive Directors, Heads of Service

Annexes:

Annex A – Draft Directorate Pressures and Efficiencies

Annex B – Draft Capital Programme



2025/26 Draft
Budget &
Medium-Term
Financial
Strategy to
2029/30

1 EXECUTIVE SUMMARY

- 1.1 This Council continue to focus on delivering the Community Vision for Surrey 2030 to ensure the county is 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 where no one is left behind.
- 1.2 Our Organisation Strategy sets out our contribution to the 2030 Vision. Within it, the Council's four priority objectives and guiding mission that no one is left behind remain the central areas of focus as we deliver high-quality and sustainable services for all.



- 1.3 The Council's purpose and approach to improving the lives of residents across the four priority objectives, as well as ensuring that no one is left behind, is set out in The Surrey Way (section 2) and reflected throughout this budget report.
- 1.4 The purpose of the Budget and Medium-Term Financial Strategy is to set out how the Council will use its funding and resources to deliver its priority objectives and core services. These sit at the core of the budget process, driving our approach to the allocation of resources and developing investment plans.
- 1.5 The period covered in this report, represents a challenging time for local authority finances, with inherent uncertainty in the planning process and significant pressures identified in relation to both cost increases in the short term and ongoing forecast increases in demand for key services. Public Sector borrowing has been put under substantial pressure by events over recent years, including government spending to combat Covid-19, high interest rates and slow national economic growth. Public finances look to be extremely challenging over the medium term, with Local Government unlikely to be spared the impact. There has been an increase recently in the number of local authorities suggesting they are struggling to meet the statutory requirement to set a balanced budget. It is therefore even more important that the Council continues to direct its resources using the most efficient means possible towards achieving its purpose and priorities, while ensuring that we delivery high quality to residents.

Developing the Draft Budget and Medium-Term Financial Strategy

- 1.6 The 2025/26 Draft Budget Report and Medium-Term Financial Strategy to 2029/30 updates on the progress to deliver a balanced budget for 2025/26. It sets out the steps taken to balance the ongoing ambitions of the council to deliver services for our residents, alongside the challenge of ensuring sustainable and resilient medium-term financial plans in a challenging national economic environment.
- 1.7 As in previous years, the production of the 2025/26 budget is an integrated approach across Corporate Strategy & Policy, Design & Transformation and Finance. Basing proposals around 'Core Planning Assumptions,' which set out likely changes to the external context in which we deliver our services, ensures that revenue budgets, capital investment and transformation plans are aligned with each Directorate's service plans and the Corporate Priorities of the organisation.
- 1.8 The Council's financial position is anticipated to remain challenging over the medium term. While many of the demands we are experiencing are not unique to this Council, we cannot rely on Government, or partners, to solve the issue for us. We need to reduce our costs and take difficult decisions in order to ensure our ongoing financial resilience.

- 1.9 The Council will continue to maintain a strong focus on financial accountability across the organisation to ensure we can both protect and continue to drive improvements in our vital services and ensure No One Left Behind.

The financial outlook

- 1.10 The national economic environment influences the level of funding available to Local Authorities. Public Sector borrowing has been put under substantial pressure by events over recent years, including government spending to combat Covid-19 and mitigate its impact on business and individuals. This coupled with slow national economic growth, has had a damaging effect on the UK economy. Local Government funding remains highly uncertain, with many local authorities highlighting difficulties in balancing the increasing cost of providing services against undefined and limited funding streams.
- 1.11 The new Government has launched a multi-year Spending Review which will conclude in Spring 2025. The Spending Review will set departmental spending plans for a minimum of three years. Whilst the Government have shown a commitment to multi-year-settlements for Local Government, the timing of the Spending Review indicates the next Local Government Finance Settlement for 2025/26 will be a single year event, with multi-year settlements aligned to the multi-year Spending Review thereafter. This would be the sixth consecutive single year settlement.
- 1.12 The Budget, delivered by the Chancellor on 30 October, provided some insight into potential funding to support local authorities experiencing unprecedented financial challenges. However, the first opportunity to understand in detail the direct impact of funding arrangements for the Council will be with the provisional Settlement itself, which is expected in late December 2024, with a final settlement in January 2025. Until this is available, significant uncertainty on funding remains, with little expectation of any major changes from the funding available in the current financial year, or certainly not enough to fill the forecast budget gap.
- 1.13 The overall outlook for 2025/26 is a challenging one. While there is an anticipated modest increase in the overall budget envelope, in line with projected funded levels, substantial increases in the cost of maintaining current service provision and increased demand, result in pressures increasing at a significantly higher rate than forecast funding. The Council continues to see exponential increases in demand for services, particularly within Adults and Children's Social Care and Home to School Travel Assistance.
- 1.14 Although good progress has been made over the last few months, at the point of publication there remains a provisional budget gap for 2025/26 of £17.4m, driven primarily by the need to maintain the delivery of priority services experiencing increasing demand pressures and higher than inflationary price rises. The rise in the living wage announced by the Chancellor on the 30th October will increase the Council's own wage bill as well as that of many of our suppliers, which will feed through into increased costs, widening the budget gap. Further actions will therefore be required to close the gap, which will be extremely challenging, given the level of pressure forecast, and may require the Council to postpone some activity that contributes directly to the achievement of our ambitions. The level of Council Tax raised, will be dependent upon progress in identifying further efficiencies and in part upon the Local Government Finance Settlement in December, and confirmation of District and Borough Council Tax Bases in January.
- 1.15 The medium term budget pressures are expected to continue to grow. In addition, changes as a result of a Funding Reform are likely to have a significant impact and increase the Council's reliance on Council Tax. The Council recognises that tackling these challenges will require a medium-term focus, meaning we need to not only look to close the residual gap in 2025/26, but simultaneously look to address the medium-term horizon.

Engagement and next steps

- 1.16 Over summer 2024, the council engaged with residents to inform the draft budget. This is in line with the council's priority objective for Surrey to have empowered and thriving communities and to enable more people to participate, engage and have a say in how things are done on matters that impact them and where they live.

- 1.17 The objectives of this engagement were to gather insight on what the most important outcomes were for stakeholders, and their views on how the council allocates its financial resources, approaches balancing the budget and circumstances under which a council tax increase would be supported. Different methods were used to gather the views of nearly 1,600 stakeholders across the county. Costs have been limited to the creation of accessible formats of our engagement material by using internal survey tools, however, this means the results illustrate the preferences of those who chose to take part but does not provide data representative of Surrey residents.
- 1.18 Potential impacts of the budget proposals are considered by services in a variety of ways, including through services' own consultation and engagement exercises and the use of Equality Impact Assessments (EIAs). EIAs are used to guide budget decisions and will be included in the final budget paper alongside an overview of the cumulative impact of proposed changes.
- 1.19 If Cabinet agrees this draft budget at its meeting on 26 November 2024, this will signal the start of a new consultation exercise with stakeholders. The purpose of this is to provide residents and organisations with information on key proposals in this draft budget and seek their views on the financial efficiencies that the council is pursuing. Where further consultation will be required on some of these efficiencies, this will be clearly highlighted.

2 THE SURREY WAY: A HIGH PERFORMING COUNCIL, ENSURING THAT NO ONE IS LEFT BEHIND



- 2.1 The Community Vision for Surrey 2030, which was created with residents, communities and partners on behalf of the whole county, sets out how we all want Surrey to be by 2030. Together, we are all working to deliver 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 where *no one is left behind*. The Council plays a big part in the joint effort to realise this vision.
- 2.2 It is our responsibility as a council to support those in need and deliver everyday improvements to residents in all walks of life.
- 2.3 We focus on a small number of organisational priorities that will help us create the conditions for Surrey to thrive. Our Organisation Strategy (2023-28), sets out four priority objectives which reflect where we can have the greatest impact on tackling inequality and improving outcomes for people living and working in the county.
- 2.4 Our main duty as a council is to deliver high-quality services, and these services are the building blocks for meeting our four priority objectives. Core services aim to support people to live independently and well in their communities, ensure children and families reach their full potential, protect Surrey's residents and businesses, and take care of Surrey's environment and highways.



- 2.5 We also want to go beyond what we’re required to do, to be a truly outstanding, high performing council. We are playing a wider strategic role in ensuring Surrey is ready to engage the big challenges and opportunities now and in the future. By working collaboratively across the county to mobilise around these key emergent issues, the lives of Surrey residents are improved, demand on services is reduced, and better outcomes and opportunities for Surrey residents are achieved. Investment in prevention and early support is key to achieving those ambitions.
- 2.6 To achieve excellence in services and ensure Surrey can meet our priority objectives, we are transforming how our organisation operates and the culture and behaviours our people embody. Outcomes within this transformation will enable us to plan our activities and measure progress in each of the four priority objectives. Progress here will help the Council become more resilient, add more value, make greater impact, and reduce demand on services as residents become more empowered and resilient.
- 2.7 The four design principles that guide how our organisation operates, and the four commitments about how our people will work are detailed in full in our [Strategic Framework – The Surrey Way](#). Key to this strategic framework and contributing to the 2030 Vision will be a commitment to monitor how we make decisions, operate, and perform against these principles and commitments. This will include measurement of performance on priority objectives, core service delivery, and organisational effectiveness, and will directly inform primary council functions like the budget process.

3 INNOVATION, TRANSFORMATION & CHANGE

- 3.1 In recent years our transformation programmes have shifted focus to a more cross-cutting approach that is rooted in the outcomes we were seeking for Surrey’s residents and businesses and to enable a financially sustainable footing over the medium-term. To achieve this, we have developed a one-council approach to transformation with several cross-council programmes designed to optimise the way we work. These programmes focus on:
 - Customer engagement and improvements to customer experiences and outcomes
 - Organisation redesign to review ‘the way we do things’ across the whole council
 - Data and digital to leverage emerging and innovative technology
 - Place and communities support to improve outcomes for residents
 - Developing the performance and culture that underpins the organisation
- 3.2 In addition, we have several major Directorate-led change programmes that are focussed on driving service excellence and making improvements to statutory and preventative services. These are driven and delivered alongside our cross-cutting work, emphasising the need and commitment for services across the council to work together to improve outcomes for Surrey residents, whilst reducing costs and ensuring a more efficient and modern organisation. With an emphasis on designing prevention-based services and supporting residents at the earliest possible stage of their customer journey, we aim to reduce demand in our critical services and support the sustainability of the Council.
- 3.3 Moving into 2025/26, the Council continues to show a strong commitment to transforming how we operate, with a planned £20m of investment in transformation and service improvement activity. This level of investment is estimating a return of £41m in spend reductions, which is made up of £14m of permanent

budget efficiencies and £27m of cost containment. In addition, this work is anticipated to generate further efficiencies over and above those currently included in later years of the MTFs.

- 3.4 In addition to financial benefits, the transformation programme is essential to achieving our strategic ambitions and objectives, as set out in The Surrey Way. Change activity delivers a large amount of non-financial benefits and improved outcomes for residents and the most vulnerable members of our communities. These benefits, and a desire to continue delivering improved outcomes, are critical for the Council to meet the social, financial and environmental challenges it faces over the next five years.
- 3.5 Due to the financial pressures we are facing, we will continue to review both the level of investment and the returns on that investment, with a view to identifying further efficiencies to support our financial sustainability.

4 SERVICE STRATEGIES

ADULTS, WELLBEING & HEALTH PARTNERSHIPS

Context

- 4.1 Adults, Wellbeing & Health Partnerships (AWHP) is made up of three main services:
 - **Adult Social Care (ASC)** – provides advice and information, assessment, care and support services for people aged 18+ with Physical and Sensory Disabilities, Learning Disabilities and Autism, Mental Health needs and for frail Older People. Surrey’s ASC service works with over 24,000 residents and funds care packages for almost 13,000 residents.
 - **Public Health (PH)** – commissions preventative services targeted at reducing health inequalities including 0-19 services, sexual health services, substance misuse service, NHS health checks and healthy lifestyle services. PH also works to protect residents from communicable diseases and environmental hazards, as well as providing public health intelligence to inform local health planning.
 - **Communities & Prevention services (C&P)** – provides a range of community functions to help join up services and prevent demand for SCC and partner services across towns and villages, supports and helps to coordinate Surrey’s voluntary sector infrastructure and administers the Your Fund Surrey capital fund and Your Councillor Community Fund revenue fund.
- 4.2 AWHP operates in an incredibly challenging environment with the current rate of rising demand for services and inflationary pressures exceeding available funding, significant legislative changes and uncertainty about future government policy, including future plans for the ASC charging reforms which have been postponed indefinitely by the new government.
- 4.3 In the context of these challenges AWHP is taking forward an ambitious programme to bring down the care package spending trajectory by transforming and improving the customer journey, including through improved reablement services, expansion of technology enabled care services and supporting more people to stay at home, effective market shaping and commissioning of services, and enabling thriving communities across Surrey’s towns and villages. In June 2024 SCC’s Cabinet approved up to £8m of investment in this programme over 2024/25 to 2026/27.

Current 2024/25 budget position

- 4.4 AWHP’s current annual revenue budget is £511.7m. At the end of September, an overspend of £3.6m was forecast against AWHP’s total 2024/25 budget. This was due to a forecast £4.9m overspend on the total care package budget and a £2.2m overspend on staffing & other expenditure budgets, partially mitigated by a forecast underspend on wider support services and additional grant funding. AWHP is continuing to seek to identify mitigations to reduce the overspend in the rest of the year.
- 4.5 The annual cost of all active care package commitments at the end of September 2024 was £10.3m higher than the 2024/25 budget. Based on the current trajectory it is estimated that this gap could rise to £16m by 31 March 2025, which is included in 2025/26 budget pressures. The full year effect of efficiencies

planned in the rest of 2024/25 and included in the 2025/26 budget seek to significantly manage down this pressure. Workforce pressures in 2024/25 are also impacting on the 2025/26 budget, with £4.2m of staffing budget pressures included in the draft revenue budget in addition to pay inflation.

Financial pressures

- 4.6 AWHP's 2025/26 draft revenue budget includes £50.1m of pressures, with £212.7m across the whole MTFS period to 2029/30. The largest pressures relate to increase demand for ASC care packages (£26.8m in 2025/26, £128.8m across the MTFS), care package and contract inflation (£20.6m in 2025/26, £79.4m across the MTFS) and workforce pressures including pay inflation (£6.1m in 2025/26, £14.3m across the MTFS).
- 4.7 Expenditure pressures are partially mitigated by inflation on ASC assessed fees & charges (£2.7m in 2025/26, £11.1m across the MTFS), £3m of budgeted increased income from Surrey's Better Care Fund for ASC in 2025/26, which is a high level estimate based on prior years pending government announcements, and £0.4m of other funding increases.

Financial efficiencies

- 4.8 AWHP's 2025/26 draft revenue budget includes £31.6m of efficiencies, with £98m planned across the whole MTFS period to 2029/30. The majority of AWHP's planned efficiencies are reliant in part, or in full, on the successful delivery of AWHP's transformation and improvement programme (£18.5m in 2025/26 and £83m across the MTFS). This includes strengths-based practice and demand management efficiencies to bring the care package trajectory to a more affordable level, market shaping & commissioning activities to implement a new technology enabled care strategy and delivery of the Right Homes Right Support ASC accommodation programme and restructuring and refocus of AWHP's community functions.
- 4.9 AWHP plans for £12.7m of efficiencies in 2025/26, £14.5m across the MTFS, the delivery of which sits outside of the directorate's transformation and improvement programme. These include efficiencies planned to mitigate ASC price inflation (£6.8m in 2025/26), improve purchasing of older people nursing/residential packages (£1.9m across the MTFS) and change SCC's ASC charging policies (£1.4m across the MTFS) and £1.4m of efficiencies across the MFS that relate to Public Health and Communities Services.

Capital programme

- 4.10 There are three main areas of capital expenditure planned:
- The Right Homes Right Support programme to develop affordable extra care housing for older people, supported independent living and short breaks services for people with learning disabilities & autism and mental health conditions, and specialist nursing and residential care service for older people. £60.2m is included in the Capital Programme & Pipeline across these workstreams, with £29.9m spent to date in prior years. The delivery of this accommodation is essential to meeting future demand and efficiencies.
 - Your Fund Surrey which is a capital fund for large and small community projects. £10.0m is included in the Capital Programme for 2025/26.
 - The capitalisation of community equipment – £1.5m per year across the MTFS.

Horizon scanning

- 4.11 Sustained and significant demand, inflationary and workforce pressures, considerable uncertainty about future funding for ASC and PH services and ongoing legislative changes and reforms all make the future operating environment for AWHP incredibly challenging.
- 4.12 The directorate is focused on delivering its ambitious transformation and improvement programme, which is vital to future financial sustainability, as well as continuing to take all opportunities to operate more efficiently. However, given the scale of pressures, further efficiencies beyond those included in the MTFS

would likely have serious detrimental impacts on the Council's ability to deliver its statutory duties to the high standards it aspires for residents.

CHILDREN, FAMILIES AND LIFELONG LEARNING

Context

- 4.13 The Children, Families and Lifelong Learning Directorate (CFL) covers all Children's Social Care, corporate parenting and Education budgets and provides budgets for all State funded Schools across Surrey. Much of CFL relates to the provision of statutory services, including care packages, corporate parent responsibilities, supporting families and the provision of services for children with additional need and disabilities both in the home and in school.
- 4.14 Core services are funded through the Council resources via the general fund, whilst funding for children in school is through the Dedicated Schools Grant (DSG).

Current 2024/25 budget position

- 4.15 CFL's current annual revenue budget is £299.9m. The budget position at the end of September 2024 is a forecast overspend of £10.4m. The largest area of pressure relates to the cost of home to school travel assistance (£7.4m), which links to the significant growth in the number of children with additional needs and disabilities in specialist provision and the statutory transport requirements for those children. Increased costs of social care placements account for the remaining pressures.

Financial pressures

- 4.16 Like many authorities across the country, the provision of support for children with additional needs continues to be one of the biggest challenges and pressure for the Council. Much of the cost is met through the high needs block of the dedicated schools grant (DSG), whilst the staffing pressures relating to assessments, management and associated transport costs cause pressures in the general fund.
- 4.17 In addition, the costs of social care placements continues to be a budget pressure across the MTFS period. Although the number of children in our care has fallen, the cost of very specialist placements continues to rise, in a highly competitive commercial market.

Financial Efficiencies

- 4.18 The Directorate is reviewing all areas for potential efficiencies, with particular focus on:
- Detailed review of Home to School Travel Assistance, where stricter adherence to our policy of not funding transport for young people outside of the statutory entitlement has been introduced.
 - Prevention has been a particular focus across all areas of CFL with additional funding and support introduced to ensure that the need for children and families to have a statutory social work intervention can be prevented wherever safe to do so.
 - Ensuring where possible children can return to their families has been a focus of the reunification project which supports the return of children successfully to home so they are no longer in our care.
 - Building and investing in Surrey owned and managed provision for both children's homes and supported accommodation allows us to have more control over the market and ensure children are placed closer to their family and community.
 - A full review of all management structures and spans of control is taking place to ensure the most efficient and cost-effective structure across the Directorate.
 - A review of all non-statutory services has been undertaken, and a review of the Directorate's business administration function is under way.

Capital budgets

- 4.19 CFLL has a direct Capital budget of £2.4m, however it has significant interest in several projects delivered through Land and Property, specifically focussed on building new SEN school provision and provision for young people in children’s Homes and supported living.

Horizon scanning

- 4.20 Work is continuing to identify efficiencies within the service as well as looking at early intervention opportunities to reduce longer term costs. The costs relating to children with additional needs and disabilities continue to be a pressure, as in the rest of the Country, and ensuring best use of our resources in supporting these children in their communities continues to be a priority.

ENVIRONMENT, INFRASTRUCTURE & GROWTH

Context

- 4.21 Environment, Infrastructure & Growth (EIG) is a future-focused Directorate which aims to shape places, improve the environment and reach sustainability and climate change targets. EIG provides many “universal services” which many or all residents access - including highways and waste management. Key service areas include:
- Maintenance and improvement of highways, footways, street lighting and other highway assets;
 - Public transport;
 - Waste management, including recycling or disposal of household waste and operation of community recycling centres;
 - Transport infrastructure and place development;
 - Countryside;
 - Planning & Development;
 - Supporting the county’s and Council’s response to climate change and carbon reduction;
 - Provision and maintenance of the Council’s land & property estate; and
 - Supporting economic growth.
- 4.22 Over the period of the Medium Term Financial Strategy, EIG’s key priorities are to:
- Continue to strengthen our financial sustainability to provide value for money to communities by leveraging available funding opportunities, identifying new commercial opportunities, opportunities for partnership working and innovating service delivery;
 - Continue to improve bus services, including the half price travel scheme and digital demand responsive transport services;
 - Continue to work with Ringway, the new Highways contract provider, improving quality of works across the county, continuing to identify opportunities to innovate and work more effectively, and delivering against carbon reduction outcomes including immediate adoption of a minimum 11% EV fleet with commitment to reach net zero by 2030;
 - Deliver the Council and county’s carbon emission reduction targets in line with our Climate Change Delivery Plan. With 41% of Surrey’s emissions resulting from Transport, a key part of delivering these targets will be supported by delivery of the Surrey Transport Plan, EV network rollout, improvements to local bus services and the introduction of Digital Demand Responsive Transport;
 - Deliver the capital programme including highways maintenance, the Surrey Infrastructure Programme, Land & Property’s portfolio improvements and develop the pipeline for future schemes;
 - Support the organisation to become agile and dynamic in its ways of working; and
 - Continue to maximise external funding toward revenue and capital activities, including grants, income and developer contributions.

Current 2024/25 budget position

- 4.23 EIG's current annual revenue budget is £187.4m. Key areas of spend include managing the recycling and disposal of the county's domestic waste collected at the kerbside and deposited at community recycling centres, managing the county's 3,000 miles of highways including repairing and maintaining the county's roads, streetlights, bridges and other assets, passenger transport including contracting bus services and operating the concessionary travel scheme for elderly and the disabled, and managing the Council's land and property.
- 4.24 A significant proportion of the Directorate's budget is linked to contracts, and EIG therefore recognises the need to work in close partnership with providers and markets to explore opportunities for efficiencies.
- 4.25 At month 6 EIG forecasts an overspend of £6.5m due to:
- pressures within Environment (£1m) including increased waste management costs, primarily due to market costs of managing dry mixed recyclables and other changes in contract costs, and costs associated with managing ash dieback,
 - pressures within Land and Property (£2.4m) due to soft facilities management, e.g. cleaning and security, energy costs due to increased usage and backdated costs, and other building running costs, and
 - pressures within Highways and Transport (£3m) due to additional verge maintenance. Further pressures associated with parking and traffic enforcement (£2m) are mitigated through use of parking funds.

8

Financial pressures

- 4.26 The EIG 2025/26 draft revenue budget includes pressures of £14.5m, £26.8m across the whole MTFS period to 2029/30, including:
- Inflation: significant spend within EIG is delivered through medium and long term contracts including bus services, highway maintenance, and waste management. Most contracts include provision for an annual inflationary uplift, e.g. to recognise that materials and labour costs are increasing. The draft budget assumes contract inflation at 2% (£2.7m) for 2025/26. Pay inflation is also included at 3% (£1.5m) for 2025/26.
 - Waste pressures include increased market prices of managing dry mixed recyclables (£2m), and other contract changes (a net pressure of £0.5m after taking account of offsetting efficiencies and mitigations).
 - Highways & Transport pressures include improvements to verge maintenance, weed control and other visual improvements (£5m), increased parking contract costs linked to inflation (£0.5m), a one-off sum to address a backlog of highway tree works (£0.5m), an expected pressure following national changes to reimbursement of bus operators for concessionary travel (£0.6m) and costs associated with maintaining park and ride services (£0.4m). These are partially offset by rephasing of an existing pressure due to changes in the timing of delivering digital demand responsive transport improvements.
 - Other smaller pressures include the cost of retendering expiring bus contracts, unachieved contract efficiencies and staffing.

Financial Efficiencies

- 4.27 The EIG 2025/26 revenue budget includes efficiencies totalling £2.6m, £4.5m across the MTFS period to 2029/30, including:
- Waste efficiencies including retender of residual waste and dry mixed recyclable contracts (£2.6m), smaller efficiencies including green and sweeper waste prices (£0.3), which together with wider inflation reductions during 2024/25 (£1m) offset linked changes in contract costs above.
 - Other proposed efficiencies include undertaking some highways repairs from existing capital budgets (£5.3m), a review of greener futures activity (£0.5m), and smaller efficiencies from maximising income

including through enforcement of bus lanes, other moving traffic offences and planning activities, and savings associated with electric vehicles and the on-street charging contract.

- These are offset by the cessation of one-off grant funding applied to manage the costs associated with bus service improvements including the introduction of digital demand responsive transport (£6.6m) and unachieved prior year Agile programme efficiencies (£1.3m).

Capital budgets

4.28 EIG delivers infrastructure improvements through the Capital Programme, which includes the capital budget for projects which are in or approaching delivery, and the capital pipeline for schemes under development and subject to business cases. EIG's draft 5 year capital programme and pipeline totals £1.4bn across the MTFs period. Key programmes and schemes include:

- Structural maintenance of roads, bridges and other highway assets
- Highways and transport improvement schemes and programmes, such as the A320 improvements, supporting the introduction of low emission buses, and the Surrey Infrastructure Plan
- Provision for waste management infrastructure including a materials recovery facility and maintenance & improvements to other waste sites.
- Greener Futures, the Council's carbon reduction plan.
- Investment in the Council's Land and Property estate, developed in close consultation with front line services to ensure the Council's assets are used effectively and are fit to support the efficient delivery of services to our residents and to support our staff to carry out their responsibilities.

Horizon scanning

4.29 In future years further opportunities are anticipated in a number of areas.

- Following an extensive procurement process the Council's new highways maintenance and improvement contract, delivered by Ringway, started in April 2022. The Council and its contractor continue to work in partnership to explore further efficiencies, for example innovations in working practices and use of improved materials.
- The Government is consulting on its Waste and Resources Strategy which could have implications for how the Council manages domestic waste, and the cost of doing so. The Strategy includes provision to improve the reuse of products, to make producers responsible for the cost of managing the disposal of products and packaging, and to change the way waste and recyclable materials are collected – all of which could provide opportunities for achieving efficiencies over the MTFs period and beyond.

COMMUNITY PROTECTION & EMERGENCIES

Context

4.30 The Community Protection & Emergencies Directorate (CP&E) is a statutory service which aims to make Surrey a safer place to live, work, travel and do business. In recent years, in response to His Majesty's Inspectorate of Constabulary and Fire & Rescue Services (HIMCFRS), CP&E has put in place major improvement programmes which was, in part, set out in the Making Surrey Safer Plan (MSSP) 2020-24. A big part of the MSSP is about improving how we deliver prevention and protection activities, helping to prevent emergencies from happening in the first place.

4.31 Partnership working is key to the success of the MSSP, starting within Surrey County Council with Adult Social Care and Integrated Commissioning, Children, Families and Lifelong Learning and Public Health services, to help prioritise support to our most vulnerable residents. Surrey Fire & Rescue Service also aim to work collaboratively with other emergency services, District and Borough Councils and closer working with businesses to support the Surrey economy.

4.32 Other services within the Community Protection & Emergencies Directorate are Trading Standards, Safer Communities and Emergency Management.

Current 2024/25 budget position

4.33 CP&E currently has an annual revenue budget of £43.9m. At month 6 forecast expenditure is in line with budget, with pressures including fleet costs and abortive prior year spend (for which recovery is under investigation) being offset by efficiencies generated through shared support costs of Joint Fire Control.

Financial Pressures

4.34 The CP&E 2025/26 draft revenue budget includes pressures of £1.3m, £6.1m across the whole MTFS period to 2029/30; including:

- Expected growth through pay inflation, primarily anticipated growth from nationally agreed firefighter's pay awards, totalling £1.4m next year.
- Other adjustments total a net reduction of £0.1m, with non-pay inflation and communications systems costs being offset by cessation of time-limited growth introduced in previous years, including additional staffing.

Financial Efficiencies

4.35 The CP&E 2025/26 draft revenue budget includes efficiencies totalling £0.8m, rising to £1.3m over the MTFS period, including staffing reviews and efficiencies across the wider Group, sharing support costs for Joint Fire Control with partners, and an allowance to reflect the interval between staff leaving and new joiners starting.

Capital budgets

4.36 CP&E currently has a Capital Programme of £23m across the 5-year MTFS period which includes replacement of fire appliances, other vehicles and equipment.

Horizon scanning

4.37 Efficiency measures subject to further development include developing a shared use offer for future training and fleet maintenance facilities.

4.38 The Community Risk Management Plan (CRMP) 2025-2030 is progressing through scrutiny, following public consultation which concluded on 6 September 2024. The final CRMP will be taken to Cabinet on 28 January 2025 and the plan will include final proposals on how CP&E respond to the risks facing our communities.

CUSTOMER, DIGITAL AND CHANGE

Context

4.39 The Customer, Digital and Change Directorate (CDC) is made up of a range of statutory and non-statutory services including Coroner's and Registration, Cultural Services, Customer Experience and Customer Strategy, Digital & Change, IT&D and People & Change. The Directorate manages various customer-facing services, as well as playing a crucial role in enabling large-scale transformation programmes, leveraging innovative practices and digital solutions to optimise service delivery and enhance resident experience.

4.40 The purpose of the Directorate is to provide a diverse range of high quality, high profile and wide reaching/impact services for our residents, whilst also being at the forefront of shaping and delivering the Council's priority ambitions of making Surrey a great place to live, work, and learn, ensuring no one is left behind. CDC works in close partnership with other council directorates, services, and external partners to ensure successful service delivery of its work plans and programmes.

Current 2024/25 budget position

4.41 The budget position at the end of period 6 is balanced. There are £0.5m of overspends offset by £0.5m of underspends in other services. The variances all relate to staffing, Customer Services and People & Change activity levels have led to increases in staffing, these are offset by holding vacancies in Design & Change.

Financial Pressures

- 4.42 The Directorate is forecasting inflationary pressures of £1.7m, the majority of which relates to staffing inflation at 3%. Furthermore, uplifts in Microsoft licences and continued support of MySurrey adds further pressures of £0.6m.
- 4.43 The main revenue budget pressure relates to permanently funding the Data Strategy and Insights Teams, which represents a budget pressure of £1.5m in 2025/26.

Financial Efficiencies

- 4.44 The majority of the efficiencies identified for this Directorate relate to Organisational Redesign and Customer Transformation. Services have reviewed staffing levels and are proposing efficiencies of £1.9m and council wide reductions in IT licences due to staffing changes. Proposals to reconfigure the welfare offer provided by the Crisis Fund are also included. In addition, the re-procurement of the wide area network will deliver savings of £0.3m.
- 4.45 Cultural Services efficiencies include uplifts in charges for services and staffing reductions as well as non-staffing operational efficiencies, such as subscriptions. Registrations efficiencies will be delivered by additional income & Coroner's through cross cutting staffing reductions.

Capital budgets

- 4.46 The Directorate has significant capital investment and delivery plans relating to the Council's IT&D services over the MTFS period. These investment plans support our staff to carry out their responsibilities.
- 4.47 The capital pipeline and budget contains £17.5m of investment to enable the libraries transformation programme. This is a five-year programme of work to modernise library settings across Surrey to;
- Enable libraries to meet the changing needs of communities;
 - Support wider strategic priorities; and
 - Ensure library assets are fit and sustainable for the future.
- 4.48 The capital pipeline and budget also includes £1.2m to develop the mortuary and £2m to invest in Registration buildings.

Horizon scanning

- 4.49 The Directorate contains the Design & Change service, which drives further financial efficiencies across the organisation through the ambitious and forward-looking transformation programme, Core Function Redesign and Customer programmes and therefore makes a significant contribution to achieving the financial sustainability required, so that the Council can deliver priorities, resulting in better outcomes for Surrey residents.

FINANCE & CORPORATE SERVICES

Context

- 4.50 Finance & Corporate Services (FCS) is a Directorate comprised of; Finance (including Commercial & Pensions), Legal & Governance (Democratic) Services, Internal Audit, Procurement & Fleet Management, Corporate Strategy & Policy (including Risk Management), Leadership Office (including EDI) and Twelve15 (school meals service).
- 4.51 The Directorate sits at the heart of the Council, supporting and enabling the delivery of high-quality services by ensuring compliance with our rules and regulations across the Council, as well as working with services on options and plans such as the commercial strategy. The Directorate has a key role in managing risk and ensuring a correct path to decision making through procurement rules and regulations, governance and audit and ensuring a strategic integrated planning process is followed. It has a key role to play in our external relationships; Local Government, Health, the Voluntary Sector and Central Government. Through a strong business partnering approach it drives financial management best practice and accountability, works with and challenges budget holders to deliver best value for residents.

Current 2024/25 budget position

4.52 At the end of September 2024, the Directorate is forecasting a balanced budget position. There are £0.4m of overspends forecast offset by underspends in other services. The main overspends relate to under delivery of contract, cross cutting and Orbis efficiencies and an overspend on member allowance uplifts. These are all mitigated by holding vacancies, most notably in the Leadership Office, Corporate Strategy & Policy and in Finance and there is an underspend in Twelve15 from lower than anticipated operating costs.

Financial Pressures

4.53 The majority of the directorate expenditure budget is staffing (58%), the corporate assumption is that these costs will be uplifted by 3% on average. 2025/26 inflationary pressures are expected to be £1.4m.

4.54 The directorate also faces two smaller pressures from the corporate cost of copyright licences and inflationary increases to the cost of external audit fees (£0.2m).

Financial Efficiencies

4.55 Services have identified £1.4m of efficiencies to offset these pressures, the majority are Organisational redesign staffing efficiencies (£1.2m) in Finance, Legal, Leadership and Corporate Strategy & Policy. In addition, the cost of legal advocacy has reduced and the re-procurement of the Woodhatch shuttle bus has led to further cost reductions.

Horizon scanning

4.56 The Organisational redesign and customer transformation programmes will impact the directorate by providing more efficient operating models and the opportunity for further efficiencies. The directorate enables service delivery so the directorate will adapt to the size and strategic direction of the Council.

COMMUNICATIONS, ENGAGEMENT AND PUBLIC AFFAIRS

Context

4.57 The Communications, Public Affairs and Engagement Directorate (CPAE) is responsible for developing a Communications Strategy for Surrey County Council, to:

- **Protect and enhance the reputation of Surrey County Council** amongst residents, staff, peers, stakeholders, wider sector and government, to build public confidence in the organisation and the services we deliver.
- **Keep residents and staff well informed**, to increase understanding of available services, keep residents safe and well, manage emergencies and major incidents effectively, and increase workforce understanding of the organisation's ambitions and objectives.
- **Effect positive behaviour change** in residents and staff, to help the organisation achieve its objectives, including around Transformation.
- **Engage residents and staff effectively**, to ensure residents and staff feel that they have a voice to positively influence policy development and delivery, feel invested in the organisation, and cultivate a culture of ambition, inclusion and diversity. This will be linked closely with the development of the Resident Intelligence Unit and Engagement Framework already underway.

4.58 All activity within the communications and engagement strategy is aligned to help the council deliver its strategic objectives, and ultimately help ensure that no one in Surrey is left behind.

Current 2024/25 budget position

4.59 The CPAE budget position at the end of September is balanced, however there remains a risk that the assumed Core Function Redesign efficiencies are not as high as anticipated. Efficiencies relating to staffing and holding vacancies are likely to deliver the assumed reductions this year.

Financial Pressures & Efficiencies

4.60 A high proportion (90%) of the directorate budget is staffing, with the only other area of significant spend being publicity costs. The 2025/26 inflationary pressure is forecast to be £0.1m.

4.61 Staffing efficiencies are anticipated to deliver efficiencies of £0.2m in 2025/26.

5 FINANCIAL STRATEGY AND DRAFT BUDGET 2025/26

5.1 This section sets out our approach to developing a Budget and Medium-Term Financial Strategy. We committed, as part of our Finance Improvement Programme, to assessing future budget setting processes against a best practice framework. This process began for 2020/21's budget and has continued in successive years. The following six hallmarks are used as a self-assessment tool, with current progress set out alongside.

Table 1 – Self-assessment against the Hallmarks of building the Budget

Hallmark	Self-Assessment
The budget has a Medium-Term focus which supports the Strategic Plan	<ul style="list-style-type: none"> • Despite significant uncertainty in the financial planning environment, our approach continues to focus on a five-year Medium-Term period, which bears the hallmarks of sustainability and avoids short-term measures or depletion of reserves. • The MTFS continues to forecast budget gaps in future years, due to forecast budget pressures being excess of anticipated funding increases and identified efficiencies. The continuation of medium-term planning and transparency over the scale of the medium-term challenge enables the Council to look across multiple years and to continue to focus attention of the identification of efficiencies across the MTFS period. • The budget process has been coordinated across Directorate Leadership Teams, Corporate Strategy & Policy, Transformation/Design & Change and Finance; The Council continue to try to strengthen this integrated approach and links between these core activities to ensure that the budget is focussed on delivering corporate priorities, is linked to the core planning assumptions and Directorate business plans. • The Council launched a cross-cutting approach to budget setting for 2023/24 onwards to ensure that dedicated focus, resource, and adequate time is given to solving the medium-term budget gap and well as a focus on balancing the budget for 2025/26. Transformation programmes such as Organisational Redesign, Data & Digital and Customer Transformation continues this focus.
Resources are focused on our vision and our priority outcomes	<ul style="list-style-type: none"> • The Strategic and Integrated Planning Group aims to ensure integration with the Organisation Strategy, the transformation programme and corporate priorities; developed in partnership across the organisation. • The draft budget has been subject to numerous iterations through Cabinet and CLT over the last seven months to narrow the gap and clarify and update assumptions. • Core planning assumptions are developed using the comprehensive application of a recognised PESTLE+ framework to review the likely environment for budget setting and service delivery, contributed to by representatives from across the Council's services, to provide a consistent framework for planning purposes.
Budget not driven by short-term fixes and maintains financial stability	<ul style="list-style-type: none"> • We aim to continue to hold general fund reserves appropriate to meet the assessed risk environment and specific pressures to ensure our continued financial resilience despite an increasingly volatile and uncertain external environment. • We assess the level of our reserves, in the context of the risk environment in which we operate but also with reference to levels recommended by external auditors and, looking at the direction of travel (ie are reserve levels increasing or decreasing over the medium term) and utilising comparisons and benchmarking data to compare to similar authorities.

	<ul style="list-style-type: none"> • The integrated approach to budget setting with transformation and with a focus on opportunities required over the medium-term ensures that we are acting now to secure a sustainable budget over the next five years. • Business cases are built around corporate priorities; focussing on benefits realisation and deliverability across transformation, invest to save and capital.
The budget is transparent and well scrutinised	<ul style="list-style-type: none"> • The Council's Select Committees have been involved early in the budget process to set out the approach, covering the Core Planning Assumptions, funding projections and baseline financial planning assumptions. • Select Committees have been asked to identify areas of focus to enable more robust and detailed scrutiny of specific areas of pressure and/or risk. They have been provided the opportunity to put forward suggestions to close the budget gap. • In October, Directorate pressures and proposed efficiencies were shared in advance of finalising the draft budget proposals. These sessions will continue throughout the budget setting process, with formal scrutiny of this Draft Budget scheduled for December 2024. • Opposition Groups have been engaged earlier in the budget setting process since 2023/24. They have been consulted on the core planning assumptions, funding projections, key areas of risk and underlying financial planning assumptions. They have been asked to contribute suggestions to close the budget gap. • Two all Member briefings have been delivered to ensure wider engagement and opportunities for input for all Councillors.
The budget is integrated with the Capital Programme	<ul style="list-style-type: none"> • Section 6 sets out the Draft Capital Programme • The Capital Programme is developed alongside the revenue budget and is overseen by Capital Programme Panel. We continue to clearly demonstrate delivery of corporate and service priorities and set out the impact and linkages with the revenue budget. • Dedicated capital sessions have been held with the Corporate Leadership Team and Cabinet to assess the deliverability, affordability and proportionality of capital investment. Senior Leaders and Cabinet members have been involved in the prioritisation of capital bids, where decisions on available capital available funding have been required, taking into account parameters such as alignment to corporate priorities and impact on the revenue budget. • The full borrowing costs of proposed Capital Programme are reflected in the revenue budget and the trajectory for borrowing costs has been assessed over the long-term. • The full lifecycle costs of new investment are assessed to establish the long-term financial impact.
The budget demonstrates how the Council has listened to consultation with local, people, staff and partners	<ul style="list-style-type: none"> • Section 9 sets out our approach to consultation. • We delivered an engagement exercise to ask stakeholders what the most important outcomes were, what they wanted the council to focus most on, what they wanted the organisation to deliver, how the council's financial resources should be allocated, how the budget should be balanced and the circumstances under which residents would most likely support or oppose any increases in council tax. • If Cabinet agrees this draft budget at its meeting on 26 November 2024, this will signal the start of a new consultation exercise with stakeholders. The purpose of this is to provide residents and organisations with information on key proposals in this draft budget, and seek their views on the financial efficiencies that the council is pursuing. Where further consultation will be required on some of these efficiencies, this will be clearly highlighted.

Budget Principles

5.2 The MTFS for successive years has been built on a number of high-level principles which are used as a framework to set the budget. These have proven to be successful and have been reaffirmed for the 2025/26 budget. The principles are:

- Developing and continuing to strengthen the integrated approach; linking Organisation Strategy, Service and Transformation plans to the MTFS through cross-cutting business partnership;
- A balanced revenue budget with only targeted use of reserves and balances (i.e. using them for their intended purpose or to cover one-off or time-limited costs);
- Regular review of reserves to ensure appropriate coverage for emerging risk;
- Budget envelopes set for each Directorate to deliver services within available resources;
- Ensuring a culture of budget responsibility where managers are accountable for their budgets – budgets are agreed and acknowledged annually by Accountable Budget Officers through Budget Accountability Statements;
- Cost and demand pressures contained within budget envelopes to ensure ownership and accountability; and

Principles more specifically related to setting sustainable Medium-Term budgets are:

- Developing and iterating five-year plans, integrated with transformation and capital investment across the Council;
- Continuing to adopt a budget envelope approach with a model to determine a consistent and transparent application of funding reductions to Directorate budget envelopes;
- Envelopes validated annually based on realistic assumptions and insight;
- Assurance that all efficiencies, pressures and growth are owned by Executive Directors;
- Pay and contract inflation to be managed within Directorate budget envelopes;
- Fees and charges are reviewed and benchmarked;
- A corporate transformation fund held centrally;
- A corporate budgeted contribution to reserves to enable funding of one-off and transformational activity; and
- A corporate redundancy provision held centrally.

Revenue Budget Headlines

- 5.3 As an organisation we are constantly affected by our external environment, which has implications for both what we want to achieve and how we will deliver for our residents and communities. The draft revenue budget has been developed during a period of significant uncertainty; with Government leadership and policy changes, uncertainty over funding, the continued impact of increased cost-of-living and likely demand for services in 2025/26 all very unclear. Understanding this context is integral in helping inform and shape how we plan and respond as an organisation to possible future scenarios.
- 5.4 The Council develops a set of Core Planning Assumptions to help manage this uncertainty, setting out assumptions about the council's most likely operating context. The assumptions are developed from emerging policy trends and predictions drawn from government messaging, strategies, policy think tanks and other influential institutions to build an expectation of future conditions. They are not intended to define a specific future, but list important factors that may affect the council's resources and services to inform strategic and financial planning in the short to medium term.
- 5.5 Directorate growth pressures have been subject to a number of iterations and changing assumptions, culminating in indicative pressures for the Draft Budget of £108.3m, including £7.1m of increased capital financing costs. The level of pressures represents a continuation of the trend of significant increases in the annual pressures identified year on year, due to continued increasing demand pressures in a number of key services, specifically children's and adults social care placements.

- 5.6 To date, efficiencies of £57.1m have been identified. Together with an increase in funding of £33.9m (as set out in para 5.17), these developments give a gap yet to be closed for 2025/26 of £17.4m, as shown in Table 2 below.
- 5.7 Further information on pressures and efficiencies for each Directorate is set out in **Annex A**

Table 2: Summary Draft Budget Position for 2025/26.

Directorate	Base Budget £m	Pay & Contract Inflation £m	Demand & Other Pressures £m	Identified Efficiencies & Funding Increases £m	Total Budget Require- ment £m
Adults, Wellbeing & Health Partnerships	505.9	23.5	26.6	(31.6)	524.4
Children, Families & Lifelong Learning	291.6	9.5	20.1	(11.1)	310.1
Environment, Infrastructure & Growth	187.4	4.7	9.8	(2.6)	199.3
Community Protection & Emergencies	43.9	1.6	(0.3)	(0.8)	44.4
Customers, Digital & Change	49.3	1.7	2.3	(2.9)	50.4
Comms, Public Affairs & Engagement	2.8	0.1		(0.2)	2.7
Finance & Corporate Services	27.0	1.4	0.2	(1.4)	27.2
Central Income & Expenditure	100.6	0	7.1	(6.5)	101.2
Directorate Total	1,208.4	42.5	65.8	(57.1)	1,259.7
Central Funding	(1,208.4)			(33.9)	(1,242.3)
Council Total	-	42.5	65.8	(91.0)	17.4

- 5.8 Given the substantial demand pressures and the level of uncertainty nationally, specifically for local government, a gap of £17.4m (1.4% of likely net revenue funding) represents acceptable progress in balancing the budget at this stage.
- 5.9 Given the budget gap and the achievement of considerable efficiencies over recent years, it is going to be extremely challenging for the council to identify further additional efficiencies to close the residual gap. However, we will continue to review all areas of spend and look to mitigate pressures wherever possible, but the scale of the challenge may mean we have to delay the achievement of some of our priorities in order to meet the financial challenge ahead. Additional targets for the identification of efficiencies have been set for each Directorate and work is underway to develop plans to achieve these before the publication of the Final Budget.
- 5.10 We will be more certain of our final funding position for 2025/26 once the provisional settlement is issued in December, which will provide further details of the Council's specific grant allocations. Further decisions on the level of council tax required will not be made until we have more clarity on the funding position. Decisions to increase Council Tax are not made lightly and balance the need to provide sustainable services for the most vulnerable with a recognition of the pressures on household finances, particularly during the current inflationary period and increased cost of living. It is possible that the Council will need to raise council tax further than the 2.99% assumed in this Draft Budget, should that be allowed by government.
- 5.11 In addition, a review of the levels of reserves of the Council will be undertaken, with regard to the current high risk operating environment. Reserves will only be used for one-off or time limited purposes.
- 5.12 It will be crucial that any funding from the Local Government Finance Settlement in December, confirmation of District and Borough Council Tax Bases in January and the impact of any further changes in the in-year financial position for 2024/25 are assessed before a decision on Council Tax is made.

National Funding Context

Background

- 5.13 On 30 October 2024 the Chancellor of the Exchequer, delivered her first Budget Statement before the House of Commons, setting out the Government's fiscal rules and policy decisions on taxation and spend.
- 5.14 Government figures indicate an average increase in Core Spending Power (CSP) of 3.2% in 2025/26 nationally. A significant proportion of this increase comes from the presumption that all councils will levy the maximum increase in council tax permitted. Announcements included £1.3 billion of additional grant

funding for local authorities, including at least £600 million for social care. The amount that the Council receives is heavily dependent on the distribution methodology and formula adopted in determining individual authority allocations.

- 5.15 Government also announced increases to both Employer National Insurance Contributions and the National Living Wage (NLW). Both of these were higher than the existing assumptions in the budget and will lead to increased cost pressures, increasing the budget gap. The rise in the NLW will increase the Council’s own wage bill as well as that of many of our suppliers, which will feed through into increased costs, widening the budget gap. Funding for the impact of the increase in National Insurance contributions was announced simultaneously, although there are no details on how this funding will be made available. There remains a risk that funding is not sufficient to offset the increase in the Council’s wage bill experienced through this change.
- 5.16 While the announcements gave us some indication of the funding that will be made available to Local Authorities in 2025/26, the first opportunity to understand in detail the direct impact of funding arrangements for the Council will be with the provisional Settlement itself, which is expected in late December 2024, with a final settlement in January 2025. Until this is available, significant uncertainty on funding remains, with little expectation of any major changes from the funding available in the current financial year, or certainly not enough to fill the forecast budget gap. A single year Spending Review means that again there is only one-year that we have clarity over our finances whilst developing plans over the medium term to an increase in funding for local government.

Funding Assumptions for 2025/26

- 5.17 Since 2019, the most significant anticipated influence on the Council’s funding has been the long-awaited implementation of fundamental Government funding reform. Our assumption, based on sector intelligence, is that reform would see the Council’s funding drop significantly over the medium-term. Although Government has not confirmed whether these reforms will be implemented next year, full reform would require consultation and would likely be a feature of a multi-year funding review. As such, the current planning assumption is that these will not impact until 2026/27, at the earliest. Current assumptions also include an expectation of transition arrangements to smooth the impact of any significant funding variations, resulting in a largely flat funding forecast across the Medium Term planning period.

Table 3: Funding assumptions:

	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
	£m	£m	£m	£m	£m	£m
Council tax	921.1	953.6	977.4	1,004.8	1,033.0	1,062.0
Business Rates	152.1	153.9	158.0	160.5	159.4	138.4
Grants	135.2	134.8	107.4	77.6	52.3	44.9
Total Funding	1,208.4	1,242.3	1,242.8	1,243.0	1,244.7	1,245.2

Council Tax Funding

- 5.18 The working assumption is that referendum limits will remain unchanged for 2025/26 and the budget has been modelled assuming a **Band D rate increase of 2.99% on the core council tax for 25/26** (1.99% throughout the MTFs period thereafter), with no assumption on increasing the Social Care precept at this stage (this overall increase is therefore 2% below the current total referendum limits).

Business Rates funding

- 5.19 The Government have pledged to replace the current business rates system. However, as yet there have been no detailed plans, therefore, we expect no major change in 2025/26 and planning assumptions are that any changes with Business Rates remain aligned to funding reform (assumed from 2026/27). A net increase in overall business rates funding for 2025/26 (taxbase, collection fund and associated grants) is assumed at just above 1%.

Grant funding

5.20 Material grants included are the Social Care Grant, Public Health Grant and a continuation of the Funding Guarantee. Grants where there has previously been a clear intention to cease, such as New Homes Bonus and Services Grant, have currently not been assumed to continue.

Staffing Position

5.21 During the pandemic, the Council increased staff resources in a number of key areas to deliver increased activities and provide essential support to residents while continuing to improve services. Over the last 12 months, we have seen the headcount of the organisation reduce and the budget proposals see further decreases.

5.22 Table 4 below shows the forecast FTE (Full time equivalent) movements as a result of the 2025/26 draft budget proposals.

Table 4: FTE implications:

Directorate	FTE Impact of Pressures	FTE Impact of Efficiencies	Total FTE Impact
AWHP	0.0	-22.5	-22.5
CFLL	3.0	-74.0	-71.0
EIG	4.0	-13.0	-9.0
SFRS	0.0	-14.0	-14.0
CDC	0.0	-39.2	-39.2
FCS	0.0	-13.5	-13.5
CPAE	0.0	-2.0	-2.0
	7.0	-178.2	-171.2

5.23 There is an anticipated net decrease in FTEs of 171. Some of the largest areas of change include a restructure of community functions, CFLL management and administration and business support and a review of Greener Futures spending and staffing. Through the Council’s Organisational Re-design further reductions are anticipated across the medium term.

CIPFA FM Code of Practice

5.24 CIPFA has developed the Financial Management Code (FM Code), designed to ‘support good practice in financial management and to assist local authorities in demonstrating their financial sustainability.’

5.25 It is for individual authorities to determine whether they meet the standards and to make any changes that may be required to ensure compliance. Officers are undertaking a full self-assessment against the Code, results of which will be shared as part of the Final Budget papers in January 2025, including areas where further development or improvement would be beneficial in 2025/26.

6 DRAFT CAPITAL PROGRAMME 2025/26 TO 2029/30

Overview & Approach

- 6.1 Over recent years the Council’s capital ambition and delivery has grown significantly, in recognition of historic under-investment in our assets and in order to improve the condition of the infrastructure in the County. The capital programme is aligned to the Council’s corporate priorities and invests in the areas of most importance to our residents.
- 6.2 The Capital Programme planning process began in April this year, maintaining the trend of starting the process earlier each year as part of a continual drive to improve governance, deliverability and accountability in capital.
- 6.3 Our aspirations remain high and the Draft Capital Programme for 2025/26 – 2029/30 remains ambitious and proposes ongoing investment in priority areas such as highways infrastructure, improving the condition of our property estate, creating additional school places including for children with special educational needs and disabilities, the green agenda, transforming our libraries and investing in Adult Social Care accommodation with care and support.

- 6.4 Despite these continued ambitions, the economic environment has changed over recent years. Increased construction costs have made the delivery of capital schemes more expensive and successive interest rate rises have increased the cost of financing borrowing. In order to sustain our financial resilience, we have undertaken prioritisation of the capital programme, re-setting our capital expenditure approach and significantly reducing the borrowing requirement, to ensure the affordability, sustainability and proportionality of our capital programme in the medium term.
- 6.5 The Council operates a capital pipeline, in addition to the capital programme. Pipeline schemes act as a placeholder for schemes in early stages of development which are moved into the approved budget only when their benefits and deliverability are adequately demonstrated. The nature of the pipeline is to be a flexible portfolio of schemes that contribute to the Council’s strategic objectives.
- 6.6 Pipeline schemes have also been reviewed as part of the work recently carried out and a number of schemes have been re-scoped and re-prioritised, seeing an overall decrease in the borrowing requirement from pipeline schemes. This dampening of our ambitions is required to ensure the ongoing deliverability and affordability of the remaining, significant capital investment.
- 6.7 An officer-led, Capital Programme Panel (CPP), ensures that the framework for setting the Capital Programme continues to focus on outcomes for residents, deliverability and affordability and contributes to the Community Vision for Surrey 2030 and aligning with the organisation’s priorities. The impact of the Capital Programme on financial resources is assessed with each new iteration to ensure it is sustainable, with particular focus on overall borrowing levels and borrowing costs in the medium to long term.
- 6.8 Governance of the Capital Programme is led by CPP and the three Strategic Capital Groups (SCGs) for Property, Infrastructure and IT, with support from Finance and Members. The SCGs are tasked with developing the Capital Programme based on an asset planning approach to ensure that affordable, value for money capital solutions are identified to meet the needs of residents.

Capital Programme

- 6.9 The draft Capital Programme of £1,421m is set out in more detail in **Annex B**. This consists of £1,036m in the capital programme and a further £385m in the capital pipeline.
- 6.10 To finalise the Capital Programme, CPP and SCGs will continue to test the justification, affordability and prudence of plans. The outcome of this work will be presented in detail to Cabinet in January as part of the Final Budget Report, and in the Treasury Management Strategy and associated prudential indicators; both set to be approved in January 2025.
- 6.11 Uncertainty remains over the economic backdrop. Recent high construction inflation has driven up the cost of scheme delivery. While it is widely anticipated that interest rate rises have peaked, there remains uncertainty on the path of interest rates. These risks and uncertainties will be monitored through CPP and mitigating actions taken where required.

MTFS Capital Budget 2025/26 to 2029/30

- 6.12 A total of **c£1,036m of schemes are included in the proposed approved capital budget over the MTFS (excluding pipeline)**. The schemes will be monitored during the year for cost control, deliverability and to ensure budget estimates remain realistic over the period of the Capital Programme. Table 5 below shows a breakdown of budget schemes by the three SCGs over the MTFS period:

Table 5: MTFS Draft Capital Budget by Strategic Capital Group (excluding pipeline):

Strategic Capital Group	MTFS Budget (£m)
Infrastructure	511
Property	510
IT	15
Total Budget	1,036

- 6.13 These schemes deliver priorities across the county, including investment in schools, the transport network, flood alleviation, making the most efficient use of the corporate estate and providing support to vulnerable

residents. The top 10 schemes in the Capital Programme (excluding pipeline) make up 71% of the total estimated budget:

- £260m - Highway Maintenance – improvements to roads and footways across the County
- £111m - SEND Strategy – increasing sufficiency of provision for special education needs and disability in schools across Surrey
- £106m - Schools Basic Need – increasing school places and building schools across the County
- £61m - Recurring Capital Maintenance: Corporate (non-schools) estate – County wide maintenance of service buildings, community facilities and offices
- £44m - Recurring Capital Maintenance: Schools – County wide schools maintenance programme
- £41m - Bridge/Structures Maintenance – improvements and safety maintenance of specialist infrastructure
- £40m – Alternative Provision Strategy – investment in Pupil Referral Unit places and improvements for improved pupil support.
- £26m - A320 North of Woking and Junction 11 of M25 – Homes England grant funded road and junction improvements
- £25m – Surrey Flood Alleviation, wider schemes
- £20m – corporate parenting – children homes / care leavers

2025/26 Capital Budget (excluding pipeline)

6.14 c£364m is provisionally included in the draft capital budget for 2025/26 as set out in the table, below. This will need to be thoroughly tested for deliverability prior to the final budget being approved.

Table 6: 2025/26 Draft Capital Budget by Strategic Capital Group:

Strategic Capital Group	2025/26 Budget (£m)
Infrastructure	177
Property	184
IT	3
Total Budget	364

6.15 Successful delivery of the 2025/26 budget is a key part of ensuring the Capital Programme overall remains on course. Between now and the final capital budget being presented to Cabinet in January 2025, CPP will work with SCGs on the profiling of the draft budgets to ensure deliverability. The focus of the 2025/26 budget will be on the schemes that comprise the majority of forecast spend. The top 10 schemes account for 64% of the 2025/26 budget:

- £70m - Highway Maintenance – improvements to roads and footways across the County.
- £40m - SEND Strategy – increasing sufficiency of provision for special education needs and disability in schools across Surrey
- £26m - A320 North of Woking and Junction 11 of M25 – Homes England grant funded road and junction improvements
- £18m Recurring Capital Maintenance: Schools – County wide schools maintenance programme
- £17m - Recurring Capital Maintenance Corporate (non-schools) estate – County wide maintenance of service buildings, community facilities and offices
- £16m - Schools Basic Need – increasing school places and building schools across the County
- £13m – Alternative Provision Strategy – investment in Pupil Referral Unit places and improvements for improved pupil support
- £12m – Supported Independent Living (Learning Disabilities Phase 1)
- £11m – Local Highways Schemes
- £11m – Sunbury Hub

MTFS Pipeline Schemes 2025/26 to 2029/30

6.16 **Pipeline schemes** include proposals developed to a stage where they can be earmarked against a flexible funding allocation built into the wider Capital Programme. The pipeline allows projects to be approved

during the year, subject to business case approval. The SCGs have come forward with a set of proposals to support key strategic priorities and safeguard the future for Surrey residents. The table below shows a breakdown of pipeline schemes by the SCGs over the MTFS:

Table 7: MTFS Draft Capital Pipeline by Strategic Capital Group:

Strategic Capital Group	MTFS Pipeline (£m)
Infrastructure	306
Property	67
IT	2
Your Fund Surrey	10
Total Pipeline	385

- 6.1 The nature of the pipeline is to be a flexible portfolio of schemes that contribute to the Council’s strategic objectives. As a result, SCGs may update the pipeline accordingly to adapt to changing circumstances, emerging priorities and financial constraints. All pipeline proposals are subject to ongoing development, scrutiny and challenge to ensure feasibility and deliverability before being approved to budget and confirmed into the Capital Programme.
- 6.2 The pipeline is key to the Council achieving its long-term objectives. Converting the pipeline into robust business cases that can be scrutinised for funding, deliverability and benefits through the existing governance framework is a priority for SCGs and CPP. The setup of PMOs in Property and Infrastructure is a direct response to increase pipeline conversion and deliver priorities.
- 6.3 The top 10 pipeline schemes based on estimated spend over the MTFS period are shown below:
- £139m - Farnham Infrastructure Programme A31 Hickleys Corner
 - £21m – Surrey Infrastructure Plan (Placemaking Schemes)
 - £21m – Materials Recovery Facility – construction of MRF in Surrey to deal with dry mixed recyclable material arising from kerbside collections
 - £18m – Reigate Priory School
 - £16m – Farnham Infrastructure Programme (Town Centre)
 - £15m – Surrey Infrastructure Plan (Local Cycling and Walking Infrastructure Plans)
 - £14m – Slyfield Community Recycling Centre
 - £13m – Surrey Infrastructure Plan, category two
 - £12m – Ultra Low Emission Vehicles (Bus Companies)
 - £12m – Supported Independent Living (Learning Disabilities batch 2)
- 6.4 Of the total pipeline allocation in the MTFS, c.£142m or 37% is proposed for schemes that contribute to reducing carbon emissions, tackle climate change and enable a greener future for residents. A further £182m is included in the capital budget, bringing the total to c.£324m.

7 FINANCIAL PERFORMANCE 2024/25

- 7.1 The Month 6 Finance Update report is reported to the same Cabinet on 26th November 2024. Headline performance is set out below.
- 7.2 **Revenue:** As at September 2024 (Month 6), Directorates are projecting a full year overspend of £18.6m. The Directorate positions continue to be challenging, recognising the impact significant demand pressures and price increases have on the cost of delivering vital services, particularly in relation to adult social care, children’s placements and Home to School Travel Assistance.
- 7.3 The Council remains committed to budget accountability and therefore Directorates are expected to put in place mitigating actions in the remainder of this financial year to offset the forecast overspend position.

- 7.4 It is imperative that the forecast level of overspend reduces before the financial year end, otherwise there could be a material negative impact on the level of the council's reserves at a time when the level of external financial risk is extremely high.
- 7.5 **Capital:** The 2024/25 Capital Budget was approved by Council on 6th February 2024 at £404.9m. The Capital Programme Panel, working alongside Strategic Capital Groups, has undertaken a detailed review of the programme to validate and ensure deliverability. The re-phased capital programme reduces the 2024/25 budget to £316.5m, as approved by Cabinet in July 2024.
- 7.6 The forecast at M6 is for full year spend of £325.5m, representing a £9m variance against the re-set capital budget, which is the net effect of acceleration in some areas and slippage against other schemes.
- 7.7 More information on the revenue and capital position can be found in the 2024/25 Month 6 (September) Financial Report to Cabinet on 26th November 2024.
- 7.8 Many of the factors impacting the 2024/25 expected outturn position for both revenue and capital will continue into 2025/26 and the medium term. Budget estimates for 2025/26 include the ongoing impact of Directorate variances from the current financial year, where they are expected to continue. Demand pressure trajectories have been continued into 2025/26 in relation to those services experiencing pressures over and above the budget assumptions in 2024/25, specifically within adult social care and children's services. This provides confidence that the underlying budget, overall, should be realistic and deliverable.

8 MEDIUM TERM FINANCIAL OUTLOOK & STRATEGY TO 2029/30

Funding Context for the Medium-Term

- 8.1 Over the medium-term, the gap between expected Directorate spending pressures and projected funding grows significantly. By 2029/30, the Council will need to close a gap of c.£193m. This is driven by:
- Growth pressures: including demand and inflation: c£343m;
 - Increased borrowing costs of the capital programme: £35m;
- Partly offset by:
- An overall increase in funding: c£37m;
 - Less efficiencies identified to date: c£148m.
- 8.2 Although our immediate priority is understandably closing the gap and setting a balanced budget for 2025/26, we also need to focus on the medium-term. Transformation and service delivery plans are being developed now to identify opportunities to improve our medium-term financial outlook. These proposals will continue to iterate as plans and projections gain more certainty.

Table 8: MTFG Gap to 2029/30

	2025/26	2026/27	2027/28	2028/29	2029/30	Total
	£m	£m	£m	£m	£m	£m
Brought forward budget	1,208.4	1,259.7	1,294.6	1,338.9	1,383.6	
Directorate Pressures	101.2	54.3	60.0	62.2	65.7	343.4
Increased borrowing costs of Draft Capital Programme	7.1	10.1	8.7	5.5	3.4	34.8
Identified Efficiencies	(57.1)	(29.5)	(24.3)	(23.1)	(14.0)	(147.9)
Total Budget Requirement	1,259.7	1,294.6	1,338.9	1,383.6	1,438.7	230.3
Change in net budget requirement	51.3	34.9	44.3	44.7	55.1	230.3
Opening funding	1,208.4	1,242.3	1,242.8	1,243.0	1,244.7	
Funding (reduction) / increase	33.9	0.5	0.2	1.7	0.5	36.8
Funding for Year	1,242.3	1,242.8	1,243.0	1,244.7	1,245.2	
Overall Reductions still to find	17.4	51.8	95.9	138.9	193.5	
Year on Year - Reductions still to find	17.4	34.4	44.1	43.0	54.6	193.5

Council Tax, Business Rates & Local Government Funding Reform

- 8.3 A neutral scenario for Council Tax has been modelled assuming a Band D rate increase of 2.99% for 2025/26 and 1.99% over the remaining planning period. From 2026/27, the tax base has been modelled at 0.80% growth on an ongoing basis.
- 8.4 No assumption is currently made on the level of Adult Social Care precept from 2025/26.
- 8.5 It is important to note that the Council's main funding source is Council Tax. On average, this funds 77% of net revenue expenditure, the impact of the increased cost-of-living on residents affecting their ability to pay Council Tax make this area particularly difficult to predict. Local Council Tax Support schemes provide some assistance, with increasing support here likely to result in a reduced tax base approved by district and boroughs.
- 8.6 On the basis that the Government has launched a spending review to conclude in 2025 and committed to multi-year settlements, Funding Reform has been modelled to take effect from 2026/27 at the earliest. Confirmation over the timing of the reform is crucial to planning, not least because we anticipate the results will reduce our overall funding. We have assumed transitional arrangements will be put in place to phase the impact of the reduction expected from resource equalisation. Fair Funding Reform could have a very significant impact on the Council's future funding position and it is likely to increase the Council's reliance on Council Tax.
- 8.7 The Government has pledged to replace the business rates system and this pledge appears to be aimed at levelling the playing field between the high street and online retailers. With limited detail on what this could mean, our current planning assumptions remain in line with previous assumptions on funding reform. That is, once funding reform is implemented the Council anticipates an initial increase to Business Rate retention, offset by a significant decrease to grant income. The level of Business Rates retained has a direct relationship with funding reform and as such we expect this funding to reduce over the remainder of the MTFS, as transitional arrangements unwind.

Grant income

- 8.8 The Service Grant and New Homes Bonus funding are currently assumed to cease. Post reform, it is likely the majority of grant income will be rolled into baseline funding. The scale and pace of this will form part of the reform principles and any transitional arrangements put in place to smooth the anticipated impact over the MTFS period.

9 ENGAGEMENT AND CONSULTATION

- 9.1 Over summer 2024, the council engaged with residents to inform the draft budget. Mindful of the current financial context, we have taken a prudent approach to our consultation and engagement activity. By using internal survey tools, costs have been limited to the creation of accessible formats of our engagement material, however, this means the results illustrate the preferences of those who chose to take part but does not provide data representative of Surrey residents.
- 9.2 For this phase of engagement, the council asked for insight from stakeholders on:
- The importance they placed on each of 11 outcomes, based on the Community Vision for Surrey in 2030 and Organisation Strategy 2023 – 2028:
 - Better public transport connections for easier, more predictable journeys
 - Better roads and pavements
 - Enabling people of all ages to access education and skills
 - Making our communities safer
 - Promoting better health and wellbeing for all residents
 - Tackling climate change and protecting Surrey's countryside and biodiversity
 - Providing care for adults and children who need us most
 - Reducing waste and increasing recycling
 - Reinvigorating town centres and high streets
 - Stronger community relations through local community networks and support
 - Supporting local businesses to prosper and grow the economy

- How the budget should be allocated.
- Approaches to balancing the budget.
- Conditions for supporting a council tax increase.

9.3 Data was gathered from nearly 1,600 stakeholders using:

- An open survey on the Surrey Says platform (28 Aug - 30 Sep 2024) with 1,495 participants. Survey respondents were self-selecting, which means the results should not be treated as representative of the whole of Surrey's population.
- Community events and reference groups, engaging nearly 90 residents.
- Promotion via social media, the Surrey Matters website, newsletter, and local council members.

Key messages

Priority outcomes

9.4 Open survey respondents prioritised:

- Better roads and pavements (79%)
- Providing care for adults and children who need us most (76%)
- Making our communities safer (74%)
- Better public transport connections for easier, more predictable journeys (70%)

9.5 Younger respondents prioritised roads less than older ones. Community safety was most important in Runnymede, Spelthorne, Tandridge, and Mole Valley.

9.6 At community events, the focus was on:

- Care for vulnerable groups and health and wellbeing.
- Education and skills, especially SEN provision.
- Public transport and reducing social isolation.
- Community safety.

9.7 Attendees emphasised the importance of caring for the vulnerable, funding education and skills, and improving safety in town centres.

Use of resources

9.8 Stakeholders were asked for their views on how the council should allocate its resources. The choices offered to them were to allocate resources to:

- services that benefit the majority of residents or services that benefit those with the greatest needs, such as residents with disabilities and additional needs.
- local areas with the highest number of people with poor health or across all local areas in Surrey.
- meet the needs of residents today or meet the long-term future needs of residents.

9.9 Open survey respondents preferred resources for the majority (54%) and across all areas (64%). Community event respondents favoured resources for those with the greatest needs and areas with poor health.

9.10 Open survey respondents prioritised current needs (50%), with older respondents favouring this more than younger ones, who preferred future needs. A significant minority (44%), wanted the focus to be on the future long-term needs of residents.

Balancing the budget

9.11 Open survey respondents were asked about approaches to balancing the budget:

- introducing charges for services which are currently free or subsidised.
- reducing or stopping some services to protect others.

- providing local people and communities with the tools to support others and set and deliver local priorities.
- equipping Surrey County Council staff with the skills to work together with communities and partners to deliver services across the county.
- working with partner organisations to provide services.

9.12 Most respondents supported increased partnership working (80%), equipping staff to work with partners and communities (70%) and providing local communities with tools to support themselves more (63%). Most residents opposed the idea of reducing or stopping services to protect others (80%) and introducing charges for free or subsidised services (64%).

Council tax increase - scenarios

9.13 Open survey respondents were asked to indicate the circumstances under which they would support or oppose a council tax increase. The scenarios residents had to respond to were:

- as an alternative to imposing/increasing fees and charges for services.
- if the additional funds will be used to finance long-term investment plans.
- only when opportunities to streamline services have been exhausted.
- to protect services for the most vulnerable and those without choices.
- when the only alternative is to stop delivering some services.
- under no circumstances.

9.14 The most supported scenarios were to protect services for the vulnerable (67%) and after exhausting streamlining opportunities (66%).

9.15 The most opposed scenario was increasing tax for long-term investment (52% opposed). There was also less support for an increase as an alternative to fees and charges (52% opposed).

9.16 38% of respondents opposed any tax increase under any circumstances, while 45% recognised legitimate circumstances for a rise.

9.17 If Cabinet agrees this draft budget at its meeting on 26 November 2024, this will signal the start of a new consultation exercise with stakeholders. The purpose of this is to provide residents and organisations with information on key proposals in this draft budget, and seek their views on the financial efficiencies that the council is pursuing. Where further consultation will be required on some of these efficiencies, this will be clearly highlighted.

Equality impacts

9.18 Given the nature of the services we provide as a local authority, we already ensure that services are delivered in a way that appreciates resources are finite and are targeted to areas where they are needed most. This means it is challenging to avoid all scenarios where some vulnerable groups are affected. Equality Impact Assessments (EIAs) are one of many measures we use to guide budget decisions and manage the risks of any potential negative equality impacts. EIAs approved by the relevant Executive Director and Cabinet Member will be included in the final Budget with an overview of the cumulative impacts.

9.19 The Council assesses impacts on the nine characteristics protected under the Equality Act 2010 and other vulnerable groups, such as those facing socio-economic disadvantage, carers, and the those experiencing homelessness. Early equality analysis will be reviewed by Select Committees, with a full analysis presented with the final budget in early 2025. This analysis is ongoing and subject to change as budget details are refined.

9.20 Some budget proposals may not have enough detail or activity planned out to enable a comprehensive and thorough equality analysis at this time. Where this is the case, some provisional information that is more narrative based will be developed.

- 9.21 Initial analysis on the insight emerging at this stage shows the main characteristics likely to be disproportionately impacted are: Older adults and their carers, and adults of all ages with physical, mental and learning disabilities and their carers; children and young people, including those with special educational needs and disabilities (SEND), and families; and Staff and residents facing socio-economic disadvantage.
- 9.22 Most of the impacts are positive, given the way we approach service delivery often focuses on those who are most in need. For example, there are a number of proposals aimed at helping vulnerable children, including those that prioritise placing looked after children within the county and closer to friends and supportive communities. We have also proposed changes to the way adult social care is delivered to help ensure more support for people at home.
- 9.23 The groups identified as likely to experience disproportionate impacts are mainly impacted through efficiencies related to changes to: 'Front-door' services that may have additional accessibility considerations, changes to services where the makeup of service users/ residents or staff have over-representations of particular characteristics (in particular services related to vulnerable adults or children), and changes to our funding arrangements with partners who deliver services to certain vulnerable groups.
- 9.24 We are committed to using co-design, consultation and engagement methods to produce services that are responsive and focus on supporting people that need them most. We are also committed to investing in preventative activity and early-intervention measures to help enable better outcomes earlier and avoid having to resource high-cost intensive activity that leads to greater pressures on our budget. We are committed to work closely with strategic partners to mitigate impacts where relevant.

10 NEXT STEPS

- 10.1 The Final 2025/26 Budget Report and Medium-Term Financial Strategy will be presented to Cabinet in January 2025 and Full Council in February 2025.
- 10.2 Select Committees have been involved throughout the budget setting process for 2025/26 – 2029/30. Early planning assumptions, key challenges and budget envelopes were shared in July. During these sessions, areas of focus for identifying opportunities for efficiencies and areas of key challenge and risk were identified. Each of the Select Committee explored two of these specific areas in more detail. During October, further budget updates were provided to the Select Committees, updating on progress on the Draft Budget proposals, including getting specific feedback from these focused sessions. Recommendations have been made to Cabinet for consideration alongside these draft budget proposals. Select Committees will undertake further scrutiny of the Draft Budget in early-December, with any agreed outcomes from that scrutiny, and the more detailed conclusions from resident engagement reflected in the final budget.
- 10.3 The provisional settlement is expected in late December and will be confirmed in January, the outcomes of which will feed into the Final Budget report to Cabinet.
- 10.4 At this point we are expecting a balanced budget for 2025/26 to Cabinet and Full Council for approval. The focus for the intervening period is to resolve the budget gap of £17.4m. This is likely to be achieved through a balance of the following factors:
- Review funding assumptions - specifically following the Local Government Finance Settlement;
 - Ensure that contributions to reserves in the 2025/26 budget are set at the appropriate levels, reflecting the current high-risk environment and providing resilience to deal with continuing uncertainty, specifically around the economy, policy changes and inflation;
 - Review the Council's level of reserves, recognising the need to balance ongoing financial resilience with ensuring funds are put to best use.
 - Consider further Council Tax rises, balancing the need to provide sustainable services for the most vulnerable with a recognition of the pressures on household finances.
 - Review Directorate budget envelopes for further efficiencies; and
 - Continue to review opportunities and drive further cross cutting efficiencies.

10.5 The Final Budget Report will include a number of additional sections including the statutory requirement for the s151 officer to comment on the robustness of the estimates made for the purposes of the budget calculations and the adequacy of the proposed financial reserves (known as a Section 25 report). In addition, the Final Budget will include the formal approval of the Council Tax Requirement for 2025/26 and the Capital, Investment & Treasury Management Strategy.

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	2025/26	2026/27	2027/28	2028/29	2029/30	
	£m	£m	£m	£m	£m	£m
a) Brought forward budget	1,208.4	1,259.7	1,294.6	1,338.9	1,383.6	

Pressures

Directorate	Pressures					
	2025/26	2026/27	2027/28	2028/29	2029/30	Total
	£m	£m	£m	£m	£m	£m
Adults, Wellbeing & Health Partnerships	50.1	39.7	39.1	40.6	43.2	212.7
Children, Families & Lifelong Learning	29.6	13.5	13.3	14.0	14.4	84.8
Environment, Infrastructure & Growth	14.5	(1.7)	4.7	4.6	4.7	26.8
Community Protection & Emergencies	1.3	1.0	1.2	1.2	1.4	6.1
Customers, Digital & Change	4.1	1.1	1.1	1.2	1.3	8.8
Comms, Public Affairs & Engagement	0.1	0.1	0.1	0.1	0.1	0.3
Finance & Corporate Services	1.6	0.6	0.6	0.6	0.6	3.9
Central Income & Expenditure	7.1	10.1	8.7	5.5	3.4	34.8
b) Total Pressures	108.3	64.4	68.7	67.7	69.1	378.3

Efficiencies

Directorate	Efficiencies					
	2025/26	2026/27	2027/28	2028/29	2029/30	Total
	£m	£m	£m	£m	£m	£m
Adults, Wellbeing & Health Partnerships	(31.6)	(17.6)	(18.5)	(17.6)	(12.7)	(97.9)
Children, Families & Lifelong Learning	(11.1)	(13.1)	(6.0)	(5.1)	(1.3)	(36.6)
Environment, Infrastructure & Growth	(2.6)	(1.9)	0.4	(0.4)	0.0	(4.5)
Community Protection & Emergencies	(0.8)	(0.5)	0.0	0.0	0.0	(1.3)
Customers, Digital & Change	(2.9)	(1.0)	(0.1)	0.0	0.0	(4.0)
Comms, Public Affairs & Engagement	(0.2)	0.0	0.0	0.0	0.0	(0.2)
Finance & Corporate Services	(1.4)	(0.5)	0.0	0.0	0.0	(1.9)
Central Income & Expenditure	(6.5)	5.0	0.0	0.0	0.0	(1.5)
c) Total Efficiencies	-57.1	-29.5	-24.3	-23.1	-14.0	-147.9

Indicative Budget Requirement (a + b - c)	1,259.7	1,294.6	1,338.9	1,383.6	1,438.7	230.3
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d) Indicative funding increase / (reduction)	33.9	0.5	0.2	1.7	0.5	36.8
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Remaining Gap (b - c - d)	17.4	34.4	44.1	43.0	54.6	193.5
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*Columns and rows may not sum throughout the annex due to the impact of minor rounding discrepancies

ADULTS WELLBEING & HEALTH PARTNERSHIPS

Pressures

Pressure	Description	Net Pressure					
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	Total £m
ASC price inflation (care packages & contracts)	Estimated cost of price inflation taking into account forecast increases to key inflation indicators including the NLW & CPI. Pressures are currently costed based on a 5.77% NLW uplift in 2025/26, 4% in 2026/27 and 3% per year thereafter. CPI is budgeted at 2% per year across the MTFS period. Pressures will need to be reviewed in light of the Autumn Statement and pending the Draft Local Government Finance Settlement. Assumptions are made about the proportion of packages for each market sector that will receive uplifts based on the inflation principles proposed for each sector. The gross inflationary pressures shown here are before any planned efficiencies to mitigate inflationary pressures.	20.028	15.722	13.135	13.363	13.764	76.013
ASC assessed fees & charges inflation	Estimated inflationary increases in income received from residents who are financially assessed under the Care Act to contribute towards the cost of their care packages. This is driven by factors such as changes to pension and benefit rates.	(2.675)	(2.026)	(2.075)	(2.126)	(2.178)	(11.081)
Public Health contract inflation	Estimated contract inflation on PH commissioned contracts (approximately 2% per year)	0.645	0.655	0.668	0.681	0.695	3.344
Care package carry forward pressure from 2024/25 - current trajectory	The estimated extent that care package net expenditure commitments will be above the 2024/25 budget by year end and therefore carry over as a pressure into 2025/26 based on the current care package expenditure trajectory prior to actions planned to mitigate the current trajectory which are included in efficiencies	16.121					16.121
Care package demand in future years - current trajectory	The estimated increased expenditure on care packages in future years due to increases to the number of people receiving care funded by SCC and increases to the cost of care packages excluding inflation based on the current care package expenditure trajectory prior to actions planned to mitigate the current trajectory which are included in efficiencies	10.663	22.942	24.818	26.087	28.184	112.695
Community Equipment Demand	ASC's share of the estimated increased expenditure requirement on the joint community equipment store (a pooled budget with ICB health partners) based on rising demand.	0.313	0.375	0.438	0.500	0.563	2.188
Pay inflation across the AWHP directorate	Estimated cost of pay inflation modelled at 3% 2025/26, and 2% 2026/27 - 2029/30	2.840	1.999	2.042	2.086	2.130	11.097
Other staffing budget changes across the AWHP directorate	Reduction in the vacancy factor built into the ASC budget reflecting increased recruitment to roles to delivery core statutory duties, £0.5m underachievement against 2024/25 workforce reconfiguration target, pay progression and non-pay inflation for staffing budgets.	3.225					3.225
Communities functions	A proportion of the total investment in the communities function is based on one off funding arrangements for community based work and roles that ends in March 2025. This pressure reflects the end of that funding prior to planned actions to achieve efficiencies	0.988	0.039	0.041	0.043	0.044	1.156
Changing Futures	Investing in sustainable funding for the Changing Futures Programme. There is continuing ambition to secure funding from system partners. £1.3m is the maximum amount needed to maintain the programme.	1.300					1.300
Increase to Better Care Fund income	Estimate of potential increased BCF income for ASC based on the trend in recent years	(3.000)					(3.000)
Changes to other ASC grants	Assumes that Social Care in Prisons and ASC's share of Local Reform & Community Voices grant funding that was received in 2023/24 but was not included in the 2024/25 budget continues in 2025/26. All other grant funding assumed to continue at 2024/25 levels	(0.393)					(0.393)
Total Pressures		50.056	39.707	39.066	40.634	43.201	212.664

Efficiencies

Efficiency	Description	Efficiency					
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/39 £m	Total £m
Demand management to mitigate 2024/25 carry forward pressure	Planned actions through consistent strengths based practice across all client groups to avoid full year care package commitments increasing by £6m in the period August 2024 - March 2025, which is the estimated increased for the current trajectory, and reduce the end of July 2024 full year commitments by £2.6m over and above mitigating the current increasing trajectory	(8.595)					(8.595)
Demand management future years - Older People		(3.179)	(8.687)	(10.506)	(9.570)	(7.695)	(39.638)
Demand management future years - Physical & Sensory Disabilities	Mitigating some of the cost of increased demand for ASC services included in pressures based on the current demand trajectories for each client group through a range of actions including embedding strengths based practice, redesigning the front door, utilising technology enable care services, maximising the benefit of reablement services. This includes opportunities identified in the diagnostic conducted by Newton Europe.	(0.335)	(0.894)	(1.195)	(1.205)	(1.084)	(4.713)
Demand management future years - Learning Disabilities & Autism		(0.437)	(1.091)	(1.399)	(1.604)	(1.775)	(6.308)
Demand management future years - Mental Health		(0.404)	(1.168)	(1.080)	(0.757)	(0.768)	(4.177)
Learning Disabilities & Autism setting based reviews	Reviews of residential care homes and supported living care settings where ASC is funding support for people with a Learning Disability and / or Autism to ensure care packages are in line with people's latest eligible support needs and utilise Technology Enabled Care services to reduce care package costs where appropriate	(2.199)	(1.848)	(2.041)	(2.343)		(8.431)
Learning Disabilities & Autism 65+ care package reviews	Reviews of care packages for people with a Learning Disability and / or Autism who are aged 65 or over to ensure care packages are aligned with people's needs in older age	(0.260)	(0.750)	(0.981)	(0.820)	(0.329)	(3.139)
Learning Disability & Autism shared home based care allocation reviews	Review Learning Disability & Autism home based care packages with shared allocations across more than one person and reduce shared allocations where appropriate in line with actual usage and need	(0.360)	(0.240)				(0.600)
Mental Health supporting independence reviews	Strength based reviews of Mental Health care packages to identify where people can be appropriately supported to increase their independence and reduce the cost of funded care packages	(0.250)					(0.250)
Older People and Physical & Sensory Disability care package strength based reviews	Strength based reviews of Older People and Physical & Sensory Disability care packages across locality teams to ensure care packages are aligned to people's latest eligible needs	(0.569)					(0.569)
Out of county care packages	Achieve efficiencies for people SCC funds in out of county care packages, either by securing income contributions from local NHS (e.g. for Section 117 Aftercare), transferring to the host local authority where appropriate or supporting people to move back into Surrey with better outcomes at lower cost.	(2.000)					(2.000)
Remodel Learning Disabilities & Autism day support services	Continue to move towards a more personalised approach to supporting people during the day, including reducing reliance on institutionalised building based services.	(0.600)	(0.300)	(0.300)			(1.200)
Review and remodel transport arrangements to and from ASC care settings	Reduce the scale of transport to institutionalised building based day services in line with the approach to move towards a more personalised approach to supporting people during the day.	(0.168)	(0.084)	(0.084)			(0.336)
Strategic shift from Learning Disability / Autism residential care to supported independent living	Where appropriate and subject to review of people's needs, support people to move from institutionalised residential care to supported independent living services in the community. This will be facilitated by delivering new Learning Disability supported independent living accommodation through the Council's Right Homes Right Support programme.	(0.501)	(0.220)	(0.104)	(0.290)	(0.377)	(1.492)

Efficiency	Description	Efficiency					Total £m
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/39 £m	
Affordable housing for people with Learning Disability and / or Autism	Work with District & Borough Councils to secure nominations in affordable housing for people with a Learning Disability and / or Autism with lower level needs who SCC funds to increase their independence and reduce their need for funded care packages	(0.062)	(0.125)	(0.187)	(0.250)	0.000	(0.624)
Expand affordable Extra Care Housing county-wide offer for Older People	Develop new affordable Extra Care Housing schemes on SCC owned land and secure nomination rights for ASC funded clients through delivery of the Council's Right Homes Right Support programme.	(0.007)	(0.117)	(0.178)	(0.562)	(0.584)	(1.448)
Learning Disability & Autism Short Breaks price efficiencies	Reconfigure LD&A Short Breaks services including new settings being delivered through the Council's Right Homes Right Support programme to reduce the overall unit cost of these services	(0.050)	(0.200)	(0.070)			(0.320)
Improved purchasing of Older People nursing/residential placements	Purchase 80% of Older People nursing & residential care placements at SCC's affordable guide prices and limit the cost of placements purchased above guide prices through effective management of the SCC's Dynamic Purchasing System.	(0.757)	(0.641)	(0.364)	(0.137)		(1.899)
Mitigation of price inflation	Reduction on the gross budgeted price inflation on ASC care packages and contracts through mitigating actions which include working closely with the provider sector on models of care and costs of service delivery.	(6.817)					(6.817)
Secure increased Section 117 Aftercare funding from the NHS	Secure funding from Integrated Care Board partners under the terms of the joint Section 117 Aftercare policy for people subject to Section 117 Aftercare who ASC currently funds 100% of their care packages	(1.400)					(1.400)
Continuing Health Care for out of county cases	Secure Continuing Health Care for people who have a primary health need and who have been placed in support arrangements out of county	(0.450)					(0.450)
Assessed charges income debt	Reduce the £2m budget for assessed charges bad debt and write offs and manage within the reduced budget	(0.250)					(0.250)
Changes to SCC's ASC assessed charging policies	Two changes are proposed. Firstly, to review and reassess where appropriate all clients with SCC funded packages who currently do not pay a contribution towards their care package cost and then build this more routinely into the annual review process. Secondly, to introduce charging tariff income for people receiving care in the community who have assets between the lower and upper capital thresholds. This second change would require a public consultation. For MTFS purposes it is assumed that this consultation takes place in Q2/3 2025/26 with implementation in Q3/4 2025/26.	(0.687)	(0.675)				(1.362)
Senior leadership reorganisation	Reorganisation of Adult Social Care senior leadership posts	(0.434)					(0.434)
Public Health staffing efficiencies	Maximise recharges of staff costs to external grants and manage vacancies within the available budget envelope	(0.100)					(0.100)
Public Health inflation mitigation / reduction in services	Not awarding inflationary increases where not contractually obliged and/or negotiating service reduction on non-statutory services	(0.194)					(0.194)
Communities functions re-configuration	Reconfiguration of the different sub-functions currently within the Public Health and Communities service, with activity targeted at direct prevention work and reducing demands for ASC and Children's services	(0.500)	(0.528)	(0.041)	(0.043)	(0.044)	(1.156)
Total Efficiencies		(31.565)	(17.568)	(18.530)	(17.581)	(12.657)	(97.901)

CHILDREN, FAMILIES AND LIFELONG LEARNING

Pressures

Pressure	Description	Net Pressure					Total £m
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	
Pay inflation	Increase in staffing costs as per the corporately agreed pay award. Currently estimated at 3% in 25/26	4.300	3.000	3.000	3.100	3.100	16.500
Recruitment and retention	Additional costs of ASYE scheme, apprenticeships	0.200					0.200
Early Help and family support	Implementation of the intensive family support service as an ongoing service	0.200					0.200
EHCP timeliness	The long term ongoing costs of being able to meet the timeliness of EHCP referrals		1.000				1.000
Children Looked After (CLA) Placements - Demand	Trajectory modelling of anticipated demand increases in relation to cost of exceptional individual package needs rather than additional number of placements	1.700	2.100	2.600	2.600	2.600	11.600
Children Looked After (CLA) Placements - Inflation	Trajectory modelling of anticipated inflationary increases (+5% on current costs 25/26)	4.700	2.500	2.600	2.800	2.800	15.400
Home to School Travel Assistance - Demand	Trajectory modelling of anticipated demand increases	10.700	2.400	2.800	3.200	3.600	22.700
Home to School Travel Assistance - Inflation	Trajectory modelling of anticipated inflationary increases	1.600	1.500	1.300	1.300	1.300	7.000
Contract inflation	Assumed contract inflation costs	1.000	1.000	1.000	1.000	1.000	5.000
Brought forward unachieved stretch targets	Brought forward unachieved stretch targets	3.000					3.000
Brought forward unachievable efficiencies	2024/25 unacheived contract savings	0.400					0.400
Recruitment and retention costs	Costs of introducing recruitment and retention bonuses and employment of overseas workforce to stabilise workforce	1.800					1.800
Total Pressures		29.600	13.500	13.300	14.000	14.400	84.800

Efficiencies

Efficiency	Description	Efficiency					
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	Total £m
Staffing re-organisation	Restructure of management structure, spans and layers and staffing reorganisation	(2.000)	(0.600)				(2.600)
Home to School Travel Assitance	Full year effect of prior year efficiencies focused on route optimisation and reduction of solo vehicle use	(0.500)	(2.500)	(2.600)	(2.700)		(8.300)
Children Looked After (CLA) Placements - Reunification	Dedicated team supporting social work practices to help children return home	(0.700)	(0.800)	(0.800)	(0.800)	(0.800)	(3.900)
Children Looked After (CLA) Placements - Early help and family support	Ability to reduce escalations of need for children and avoid entry to care	(0.300)	(0.400)				(0.700)
Children Looked After (CLA) Placements - Adolescence	Collaborative working across teams targeted at avoidance of entry to care for teenagers.	(1.600)	(1.700)	(1.200)	(0.200)		(4.700)
Children Looked After (CLA) Placements - In-house residential development	Developing schemes and processes for increasing utilisation of existing residential capacity and Investment in 30 new in-house residential beds to help disrupt the market and meet demand in Surrey.	(0.300)	(0.200)	(0.300)	(0.500)	(0.100)	(1.400)
Children Looked After (CLA) Placements - In House fostering	Looking a new models to maximise in house utilisation of carer capacity	(0.400)	(0.500)	(0.400)	(0.300)	0.200	(1.400)
Children Looked After (CLA) Placements - Permanence directive	Exploring early adoption avenues and promoting special guardianship arrangements through working with wider friends, family and foster carers.	(0.200)	(0.100)				(0.300)
Children Looked After (CLA) Placements - Inflation management	Review and challenge of inflationary uplifts, scrutinising cost bases of providers and their increase in cost base	(0.500)	(0.500)	(0.500)	(0.600)	(0.600)	(2.700)
Case leavers Placements - Houses of multiple occupancy	Capital investment in 6 new 4 bed homes with floating support to reduce demands on supported accommodation at current rates	(0.200)	(0.100)				(0.300)
Workforce strategies developing a permanent workforce	Reduce demand on agency and reduce agency pressures	(1.000)					(1.000)
Early Help and family support	Targeted early help work with families to reduce demands on statutory case work	(1.000)	(1.100)				(2.100)
Fees and charges	Review fees and charges.	(0.400)	(0.400)	(0.200)			(1.000)
Admin review	Review of all staff Admin costs in CFLL and Business support. This work is ongoing and is yet to be fully quantified, this number equates to reducing 80% Of the business support team by 5%	(1.000)	(0.400)				(1.400)
Fostering service review	increasing the number of in house foster carer, improved support to reduce the number of leavers and a refreshed targeted marketing strategy will also contribute to an improved enquiry to approval conversion rate.		(1.500)				(1.500)
Surrey Adult Learning Review	Review of current contracts and maximisation of centra provisions to support the service	(0.300)					(0.300)
Short Breaks Review	To identify and benchmark against the available provision		(0.800)				(0.800)
Supported Accomadation for Young Parents	Maximise the potential of the current block contract to support SCC care experienced young people.	(0.170)					(0.170)
Cross Directorate	Reduction on all non staffing budget across Dirs	(0.068)					(0.068)
Joint Placement costs	To establish a process to maximise the contribution for joint funding agreements through more rigour with Health services.	(0.500)	(1.500)				(2.000)
Total Efficiencies		(11.138)	(13.100)	(6.000)	(5.100)	(1.300)	(36.638)

ENVIRONMENT, INFRASTRUCTURE & GROWTH

Pressures

Pressure	Description	Net Pressure					Total £m
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	
All - Pay Inflation	Expected inflationary increase in salary costs. Corporate assumption 3% 25/26, then 2%.	1.455	0.993	1.011	1.030	1.050	5.539
All - Non-Pay Inflation	Assumes 2% for contract inflation	2.744	2.791	2.855	2.920	2.987	14.297
H&T - Additional Verge Maintenance and Area Cleanup gangs	Improvements in grass-cutting, weed control, and other visual improvements including signs.	5.000	(5.000)				0.000
H&T - Additional Digital Demand Responsive Transport	Further growth of DDRT (net of offsetting reductions to local bus services), over and above the first tranche agreed by Cabinet as part of the bus network review. 2025/26 reflects the adjusted timing of phase 3.	(3.742)	0.610	0.115	0.070	0.072	(2.875)
H&T - concessionary fares and other pressures	Impact of new national concessionary fares calculator, plus other smaller pressures, offset by identified savings.	0.965					0.965
H&T - Parking	Parking contract inflation (including government increase in living wage)	0.500					0.500
H&T - Trees backlog	One-off increase in budget to help address an estimated £1m backlog of tree maintenance.	0.500	(0.500)				0.000
H&T - Bus network review	Estimated financial impact of retendering expiring local bus contracts, the introduction of a first tranche of Digital Demand Responsive Transport (DDRT), and introduction of a half price travel scheme.	0.335	(0.404)	0.685	0.582	0.582	1.780
H&T - Staffing for grass cutting	Increased staff costs of operating the service, expected to reduce following wider council reviews (core functions and customer).	0.200	(0.100)				0.100
H&T - Active Travel	Maintaining new highway infrastructure to heightened design standards		0.100				0.100
Environment - Waste - contract costs	Waste contract extension changes and pressures which arose at the end of 2023/24 (e.g. business rates) which are largely offset by linked efficiencies.	4.268					4.268
Environment - Waste - Dry Mixed Recyclable prices	Global market prices increased in 2023/24 and are expected to remain high.	2.000					2.000
Environment - Countryside - ash dieback	For a limited time £0.2m was added to the 2023/24 budget to deal with ash dieback impact on countryside trees, e.g. where they effect public rights of way.		(0.200)				(0.200)
All - Unachieved contract efficiencies	To date contract management reviews have not delivered cash savings. 2023/24 & 24/25 efficiency targets (£0.2m + £0.1m) therefore not met.	0.300					0.300
Total Pressures		14.524	(1.710)	4.666	4.602	4.691	26.773

Efficiencies

Efficiency	Description	Efficiency					Total £m
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	
Environment - Waste - Residual waste reprourement	New contract has saved £3m per year. £0.6m part year impact assumed in 24/25, balance in 25/26.	(2.400)					(2.400)
Environment - Remove D&B recycling support payments	Government have announced revenue funding for District and Borough food waste collections from 1 April 2026, allowing the County Council to consider removal of recycling support payments.		(1.200)				(1.200)
Environment - Waste - Rethinking waste	Review waste operating model and assess the implications of new Government strategy - including extended producer responsibility, deposit return scheme, infrastructure, etc.		(0.950)				(0.950)
Environment - Waste - Dry Mixed Recyclables	Estimate of saving expected from the reprourement of DMR, contract goes live October '24.	(0.180)					(0.180)
Environment - Waste - Green waste contract re-price	Lower gate fee secured through contract extension with existing provider	(0.125)					(0.125)
Environment - Waste - Closure of Swift Lane CRC	Closure of Swift Lane CRC	(0.100)					(0.100)
Environment - Waste - Sweeper waste re-price	Lower gate fee secured through contract extension with existing provider	(0.034)					(0.034)
Environment - Increased income from reuse shops	Increase sales and revenue from re-use shops	(0.050)					(0.050)
Environment - Review of Greener Futures spending including staffing	Review activities, staffing and non-staffing budgets.	(0.500)					(0.500)
H&T - Bus service funding (reversal of one-off prior year efficiency)	Reversal of one-off prior year efficiency - bus grant funding expected to be used in 2024/25 to fund bus improvements will now be used across several financial years.	6.643	3.309	1.024			10.976
H&T - Funding for capitalised repairs	The revenue budget includes funding transferred to capital to fund minor repairs including potholes. In future repairs will be funded from remaining capital budget.	(5.300)					(5.300)
H&T - Automation	Increased automation for some activities such as inspections (e.g. from AI, improvements to digitisation)	(0.050)	(0.100)				(0.150)
H&T - Community transport savings	Savings identified through EV programme rollout. Grant reduces as EV fleet expands.	(0.040)					(0.040)
H&T - Traffic signal conversions	Reversal of time limited funding for traffic signal upgrades		(0.700)				(0.700)
H&T - Advertising on the highway income	While existing efficiencies are delayed, income is forecast to increase over the medium term, dependant on planning approvals.		(0.100)	(0.100)			(0.200)
H&T - Enforcement of bus lanes and moving traffic offences	Estimated contribution to highway costs	(0.125)					(0.125)
H&T - On street parking expansion - income	Increase on street parking charging opportunity by expanding on street charging locations.		(0.200)	(0.200)			(0.400)
H&T - Feet First Programme	Seek alternative funding to enable the service to work at full cost recovery. Should this not be possible, cease provision.		(0.112)				(0.112)
H&T - Cycle Training Programme	Seek alternative funding to enable the service to work at full cost recovery. Should this not be possible, cease or reduce provision.		(0.184)				(0.184)
H&T - Lab Services	Improve the marketing offer and increase the revenue for this service to enable full cost recovery. In future years build on the service and generate a surplus.	(0.020)	(0.030)	(0.039)			(0.089)
Land & Property - Scale of Operational Estate	To reduce the scale of the operational estate, and seek to close buildings more aggressively.		(0.737)				(0.737)
Land & Property - Challenge need for Retained Properties	Work with Services to progress decisions on buildings that are currently flagged as a strategic hold (to decrease running costs across the portfolio)						
Land & Property - Challenge unit costs for Operational Estate	Review all building costs and work with Macro on all Soft & Hard FM Costs						

Efficiency	Description	Efficiency					Total
		2025/26	2026/27	2027/28	2028/29	2029/30	
Land & Property - Challenge individual Service estate transformation projects which focus on the 'as is' estate.	All individual Service estate transformation projects should be stopped. All community service provision should be considered holistically, linked to Customer & Community/ Place needs alongside commercial inputs. Receipts of property outside of embedded MTFS Capital receipts & Agile to invest in 'Place'.		(0.500)				(0.500)
Land & Property - unachieved prior year facilities management efficiencies	Previous year's facilities management efficiencies are not being achieved (£1.5m) due to the identification of more sites and assets which need maintaining. This is partially mitigated through other efficiencies.	1.290					1.290
Planning & Place - income	Income from provision of Historic Environment Planning activities	(0.100)					(0.100)
Planning & Place - income	Healthy Streets Licensing	(0.050)					(0.050)
Planning & Place - income	Income from Planning Performance Agreements and charges for discretionary services	(0.020)					(0.020)
Planning & Place - income	Planning fees	(0.025)					(0.025)
Planning & Place - Placemaking Function	Maximise capitalisation of projects and seek further alternative external funding (e.g. Horizon, MHCLG Grants etc.). If unachievable reduce Placemaking service by 1-2 FTE in 2025/2026	(0.100)	(0.100)				(0.200)
Planning, Performance & Support - PMO support to other bodies	Offer PMO support outside ETI - support to B&Ds for example	(0.025)	(0.025)	(0.025)	(0.025)		(0.100)
Infrastructure & Major Projects - capital recharges	Capitalise an assumed 50% of Director of Infrastructure time.	(0.059)					(0.059)
Infrastructure & Major Projects - on-street EV charging contract income share	Contract provides SCC with a share of the income	(0.026)	(0.059)	(0.102)	(0.157)		(0.344)
Economic Development - Restructure - 'rightsized team'	Review of Economic Development team.	(0.050)					(0.050)
All - Maximising our income	Placeholder pending further income reviews	(0.200)	(0.200)	(0.200)	(0.200)		(0.800)
All - Contract inflation reduction	The 24/25 budget assumed 5% contract inflation. Rates subsequently fell, allowing 1% to be held back to offset pressures within Waste.	(0.952)					(0.952)
Total Efficiencies		(2.598)	(1.888)	0.358	(0.382)	0.000	(4.510)

COMMUNITY PROTECTION & EMERGENCIES

Pressures

Pressure	Description	Net Pressure					Total £m
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	
Pay inflation Total		1.446	1.018	0.947	0.965	1.147	5.523
Non-Pay inflation Total		0.201	0.205	0.209	0.213	0.254	1.083
Fire - Airwave communications system	Grant not kept pace with costs & grant reduction	0.085	0.086				0.171
Fire - Pension Ill Health Charges	Requirement for all officers to meet fitness requirements leading to more ill health retirements. £250k added to 2023/24 budget, reducing in future years.		(0.140)				(0.140)
Fire - Recruitment & resilience: temporary staffing increase	£0.6m added in 2023/24 to provide a multi skilled, agile group to provide cover, 12FTE to end of 2024	(0.177)					(0.177)
Fire - Recruitment & resilience: management of annual leave	£51k added to 2023/24 budget to centralise coordination of staff deployment and annual leave, for a fixed period.	(0.051)					(0.051)
Fire - 140 day plan	£375k added to 2023/24 budget to fund short term changes required within service	(0.092)	(0.066)				(0.158)
Fire - Reasonable adjustments	Extend Corporate contract for adjustments to neurodiversity to cover Fire, until included within main County Contract tender	(0.067)	(0.067)				(0.134)
Total Pressures		1.345	1.036	1.156	1.179	1.400	6.116

Efficiencies

Efficiency	Description	Efficiency					Total £m
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	
Fire - Utilise new training facilities. Expand L&D to external partners.	Linked to development of Wray park training facilities. Use by other FRS and/or private organisation. New facilities designed for use by two teams at same time.		(0.250)				(0.250)
Fire - Expand the use of new Logistics (Engineering) facilities to other users	Linked to development of Wray Park workshop facilities. Use by other in services or external partners		(0.100)				(0.100)
Fire - Replacement of airwave radio system	National project on hold. Savings not now expected until at least 29/30					TBC	0.000
Fire - Logistics - review of Staff, Property and Non Capital Assets	The remaining efficiency in 2025/26 comes from the reduction of staffing costs within logistics, including a review of staff, property, and non-capital assets in 2023/24.	(0.014)					(0.014)
Joint Fire Control	Partners shared support costs	(0.150)					(0.150)
Fire - Staff efficiencies 101	In 2025/26, reducing roles in project management, digital services, and specific positions including bank support for pension-related services. In 2026/27, further reductions will include roles in project management, administrative support, and data governance.	(0.197)	(0.148)				(0.345)
Staff capitalisation	Capitalisation of staff costs associated with capital projects.	(0.068)					(0.068)
Recruitment Factor	Support Staff and On-Call 1.5% of 2024/25 budget, this reflects the time spent to recruit to vacant post.	(0.187)					(0.187)
TS - Staff reduction	Reducing two part-time positions in senior trading standards, one focused on prevention and the other on investigations.	(0.053)					(0.053)
SC - Utilisation of grant	Core budget costs recovered through grant	(0.010)					(0.010)
EM -& SC - Amalgamation of leadership	Combined across - Emergency Management and Safer Communities	(0.050)					(0.050)
		(0.050)					(0.050)
Total Efficiencies		(0.779)	(0.498)	0.000	0.000	0.000	(1.277)

CUSTOMERS, DIGITAL AND CHANGE

Pressures

Pressure	Description	Net Pressure					Total £m
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	
Pay inflation	Pay inflation at 3% 2025/26 and 2% thereafter, includes impact of 2024/25 pay award	1.545	0.941	0.960	0.979	0.999	5.424
Non-pay inflation	Non pay inflation at 2%	0.199	0.281	0.286	0.292	0.298	1.356
IT&D MySurrey support	MySurrey Technical Services contract for support and payroll application	0.291	(0.125)	(0.025)	(0.100)		0.041
Coroners Special Inquests	To replenish the special inquest reserve which covers the volatile cost of special inquests each year.	0.100	0.050				0.150
Funding changes	Funding for Data & Insights Team discontinues in 2025/26 (linked to an efficiency)	1.492					1.492
Learning Management system	Funding for Learning Management System discontinues in 2025/26	0.100		(0.100)			0.000
Microsoft Licences	Increased costs of licences due to volume increases	0.340					0.340
Community Protection & Emergencies		4.067	1.147	1.121	1.171	1.297	8.803

Efficiencies

Efficiency	Description	Efficiency					Total £m
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	
Staffing reductions	Review of staffing across services, through redesign and distribution.	(0.410)	(0.185)				(0.595)
Organisational Redesign and Customer Transformation	Review of staffing across services, through streamlining, removing duplication and using technology.	(1.000)	(0.533)	(0.140)			(1.673)
Organisational Redesign and Customer Transformation	Review of Data Strategy & Insights team (linked to a pressure)	(0.448)					(0.448)
People & Change professional and transactional services	Previous years unachievable efficiencies and reduced income from transactional services	0.109					0.109
Income Strategy	Maximising Income	(0.291)					(0.291)
Targeted reductions	Variety of measures to reduce spend	(0.063)					(0.063)
IT&D efficiencies	Wide area network contract reductions	(0.300)					(0.300)
IT&D licence reduction	Reduced IT&D licence costs due to staffing changes	(0.113)	(0.227)				(0.340)
Surrey Arts efficiency	Remove subsidy of non targeted music tuition	(0.053)	(0.027)				(0.080)
Reduced Trade Union Posts	Reduce the current budget for trade union roles in line with 2024/25 levels	(0.048)					(0.048)
Core Welfare offer	Maximise external grants to fund the welfare offer	(0.240)					(0.240)
Core Heritage service	Service review of Archaeological services	(0.067)					(0.067)
Total Efficiencies		(2.924)	(0.972)	(0.140)	0.000	0.000	(4.036)

COMMUNICATIONS, PUBLIC AFFAIRS AND ENGAGEMENT

Pressures

Pressure	Description	Net Pressure					Total £m
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	
Pay inflation	Pay inflation at 3% 2025/26 and 2% thereafter	0.091	0.050	0.050	0.050	0.050	0.291
Non-pay inflation	Non pay inflation at 2%	0.004	0.004	0.004	0.004	0.004	0.020
Total Pressures		0.095	0.054	0.054	0.054	0.054	0.311

Efficiencies

		Efficiency					Total £m
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	
Communications - publications	Removal of annual all-residents mailer	(0.070)					(0.070)
Communications - publications	Reduction in corporate campaign spend and advertising costs	(0.020)					(0.020)
Communications team	Reduction in the cost of the Resident Insight Unit, by review of current business case and removal of roles / capabilities	(0.110)					(0.110)
Total Efficiencies		(0.200)	0.000	0.000	0.000	0.000	(0.200)

FINANCE & CORPORATE SERVICES

Pressures

Pressure	Description	Net Pressure					Total £m
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	
Pay Inflation	Pay inflation 3% 2025/26 and 2% thereafter	1.677	0.611	0.624	0.636	0.649	4.197
Non-pay inflation	Non pay inflation 2%	0.366	0.141	0.143	0.146	0.149	0.945
Income inflation	Income inflation 2%	(0.633)	(0.173)	(0.177)	(0.181)	(0.184)	(1.348)
Council copyright licences	Copyright licences for the Council	0.075					0.075
Council external audit fee	Increase in external audit fee	0.070					0.070
Total Pressures		1.555	0.579	0.590	0.601	0.614	3.939

Efficiencies

Efficiency	Description	Efficiency					Total £m
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	
Previous years efficiencies	Remove unachievable 2023/24 & 2024/25 efficiencies	0.323					0.323
Organisational Redesign efficiencies	Staffing reductions from review of Finance, Leadership Office and Legal	(0.791)	(0.500)				(1.291)
Organisational Redesign efficiencies	Staffing reductions from review of vacant posts in Leadership Office and Corporate Strategy & Policy	(0.433)					(0.433)
Targeted reductions	Targeted non-staffing reductions in Leadership and Performance	(0.028)					(0.028)
Legal Services	Reduction in expenditure of advocacy	(0.114)					(0.114)
Procurement efficiencies	Woodhatch bus service	(0.050)					(0.050)
Corporate Subscriptions	Remove New Local and Local Government Information Unit (LGIU) subscriptions	(0.031)					(0.031)
Twelve15 review	Maximising income through rate increases and reducing staffing costs	(0.250)					(0.250)
Total Efficiencies		(1.374)	(0.500)	0.000	0.000	0.000	(1.874)

CENTRAL INCOME AND EXPENDITURE

Pressures

Pressure	Description	Net Pressure					Total £m
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	
Capital Finaning Costs	MRP & Interest Payable Costs	7.100	10.100	8.700	5.500	3.400	34.800
Total Pressures		7.100	10.100	8.700	5.500	3.400	34.800

Efficiencies

Description		Efficiency					Total £m
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	
Reduction in Transformation Costs	County-wide review of Transformation costs	(1.500)					(1.500)
Planned contribution from reserves	One-of funding for additional Verge Cutting	(5.000)	5.000				0.000
Total Efficiencies		(6.500)	5.000	0.000	0.000	0.000	(1.500)

Capital Programme 2025/26 to 2029/30

Project	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	Total Budget £m
BUDGET						
A25 Dorking to Regiate Safer Roads Fund 3 (dft funded)	0.8	0.5	-	-	-	1.3
Active Travel (both EATF & future)	0.2	-	-	-	-	0.2
Active Travel Tranche 3	4.4	-	-	-	-	4.4
Bridge/Structures Maintenance	8.2	8.2	8.2	8.2	8.2	41.0
Drainage Asset Capital Maintenance/Improvements	3.6	3.2	3.2	3.2	1.0	14.2
External funding	1.2	1.2	1.2	1.2	1.2	6.0
Flooding & drainage	2.7	2.7	2.7	2.7	1.7	12.5
Highway Maintenance - Core Programme	40.0	40.0	40.0	40.0	40.0	200.0
Highway Maintenance - Enhanced Programme	30.0	30.0	-	-	-	60.0
Highway Maintenance - Signs	0.4	0.4	0.4	0.4	0.4	1.8
Illuminated Street Furniture	0.5	0.4	0.4	0.4	0.4	2.0
Local Enterprise Partnerships (LEP) Funded Schemes	0.9	-	-	-	-	0.9
Local Highways Schemes - Core Programme	3.0	2.3	2.3	2.3	2.3	12.0
Local Highways Schemes - Enhanced Programme	10.9	-	-	-	-	10.9
Replacement Vehicles	0.1	0.1	0.1	0.1	0.1	0.6
Road safety - speed management	0.1	-	-	-	-	0.1
Road Safety Schemes	0.4	0.4	0.4	0.4	0.2	1.9
Safety Barriers	1.5	1.5	1.5	1.5	1.5	7.6
School road safety schemes	0.5	-	-	-	-	0.5
Surrey Quality Bus Corridor Improvement	0.1	0.1	-	-	-	0.2
Task & Finish - flooding & drainage	0.8	0.8	0.8	0.8	1.0	4.0
Task & Finish - tree planting (& removals)	0.9	0.3	0.3	0.3	-	1.8
Traffic signals	2.7	2.9	2.4	2.4	2.4	12.8
Ultra Low Emission Vehicles - bus priority	2.0	3.7	2.1	-	-	7.8
Ultra Low Emission Vehicles - Buses	2.4	-	-	-	-	2.4
Ultra Low Emission Vehicles - Community Transport - Third Sector	1.4	1.5	-	-	-	2.9
Ultra Low Emission Vehicles - RTP1 for buses	0.3	0.3	0.3	-	-	0.9
County Model (new Transport Studies)	0.7	-	-	-	-	0.7
Highways and Transport	120.6	100.4	66.1	63.8	60.3	411.3
A320 North of Woking and Junction 11 of M25	26.0	-	-	-	-	26.0
Cranleigh High Street Public Realm Enhancements	2.9	-	-	-	-	2.9
SIP - Guildford Ebike Scheme	0.4	0.4	-	-	-	0.7
SIP - Horley Town Centre revitalisation programme	1.9	-	-	-	-	1.9
SIP - Shelveys Hill, Tadworth Flood Reduction	1.7	-	-	-	-	1.7
SIP - Three Arch Junction Improvements	2.5	0.6	-	-	-	3.1
SIP - Tongham Village & Ash Improvements	0.2	-	-	-	-	0.2
SIP: A308 Modernisation	3.9	-	-	-	-	3.9
Surrey Flood Alleviation - River Thames	2.0	-	-	-	-	2.0
Surrey Infrastructure Plan (SIP) - Weybridge town centre package	1.8	0.8	-	-	-	2.5
Infrastructure, Planning and Major Projects	43.2	1.7	-	-	-	44.9
Basingstoke Canal recurring capital maintenance	0.4	0.4	0.4	0.4	0.4	1.8
Closed landfill sites recurring capital maintenance	0.0	0.1	0.1	0.1	0.0	0.2
Improving Access to the Countryside	0.0	0.0	0.0	0.0	0.0	0.2
Public Rights of Way recurring capital maintenance	0.8	0.8	0.8	0.8	0.8	4.0
Surrey Flood Alleviation - Wider Schemes	5.2	6.5	5.8	4.1	3.5	25.0
Treescaping Bid 2	0.1	-	-	-	-	0.1
Waste Recycling Initiatives	0.1	0.0	-	-	-	0.2
Tree Planting Scheme 2023-24	0.1	0.1	-	-	-	0.2
Environment	6.7	7.8	7.1	5.3	4.7	31.6
Fire - Joint Fire Control	2.2	2.2	2.2	0.1	0.1	6.7
Fire - Making Surrey Safer – Community Resilience	0.3	0.3	0.3	0.3	0.3	1.5
Surrey Fire - Purchase of New Fire Engines & Equipment	3.6	3.8	3.9	3.0	0.5	14.9
Trading Standards Replacement Vehicles	0.1	-	-	-	-	0.1
Surrey Fire & Rescue Service	6.3	6.3	6.4	3.4	0.9	23.2
INFRASTRUCTURE	176.8	116.2	79.6	72.5	65.9	511.0

Capital Programme 2025/26 to 2029/30

Project	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	Total Budget £m
BUDGET						
Schools Basic Need	16.5	21.0	21.5	23.5	23.5	105.9
Recurring Capital Maintenance Schools	18.1	15.0	8.0	1.5	1.5	44.1
Recurring Capital Maintenance Corporate	17.1	20.0	14.0	5.9	4.0	61.0
Corporate Parenting - Care Homes	2.2	0.0	-	-	-	2.2
Corporate Parenting - Childrens Homes/Care Leavers	5.9	4.1	5.3	4.6	-	19.9
ASC SIL - Learning Disabilities Batch 1	11.7	0.1	-	-	-	11.8
Agile Office Estate Strategy - Spokes fit-out	0.2	-	-	-	-	0.2
Bookham YC	1.8	0.9	-	-	-	2.7
Winter Maintenance Depot (Godstone & Merrow Salt Barns)	0.6	-	-	-	-	0.6
Pendell GRT Transit Site for Gypsy, Roma & Travellers	-	1.2	-	-	-	1.2
ASC Extra Care Housing Phase 1a	0.3	-	-	-	-	0.3
ASC Independent Living / Short Breaks	5.6	1.4	0.4	-	-	7.4
SEND (Special Education Needs & Disabilities Schools)	40.1	38.3	20.9	11.2	-	110.5
Sunbury Hub	10.6	7.0	-	-	-	17.6
Alternative Provision Strategy (SEND)	12.7	10.4	9.8	7.2	-	40.1
ASC Extra Care Housing Phase 2	2.0	6.8	0.8	0.8	-	10.5
ASC Extra Care Housing Phase 1b	0.6	0.7	0.7	0.7	-	2.6
SFRS - Fire Stations - Lingfield	1.4	0.1	-	-	-	1.4
SFRS - Fire Stations - Reigate	5.1	0.1	-	-	-	5.2
SFRS - Fire Stations - Chobham	1.0	1.3	-	-	-	2.3
SFRS - Fire Stations - Godstone	0.2	0.0	-	-	-	0.2
SFRS Vehicle Workshop	0.2	1.7	1.4	-	-	3.3
SFRS - Fire House	6.1	6.5	1.0	-	-	13.7
Registration Services	1.5	-	-	-	-	1.5
Hubs - Staines	3.6	-	-	-	-	3.6
Depots- Godstone	2.0	2.0	-	-	-	4.0
ASC SIL - Mental Health	1.6	1.8	2.2	0.8	-	6.5
Libraries Transformation Phase 2 - Guildford Library	0.6	-	-	-	-	0.6
Weybridge Hub	1.3	0.2	-	-	-	1.5
Libraries Transformation Phase 1	5.3	0.8	-	-	-	6.1
Agile Office Estate Strategy - VG Fitout	1.0	-	-	-	-	1.0
Kalima GRT - Refurbishment	2.4	0.6	-	-	-	3.0
Kiln Lane GRT - Refurbishment	0.7	0.0	-	-	-	0.7
Pendell North GRT - Refurbishment	0.4	0.0	-	-	-	0.5
Land and Property	180.5	142.1	85.9	56.2	29.0	493.7
Devolved formula capital - schools	0.8	0.9	0.9	0.9	0.9	4.5
Adaptions For Children With Disabilities	0.5	0.5	0.5	0.5	0.8	2.8
Foster carer grants	0.5	0.2	0.2	0.2	0.5	1.7
Childrens Services	1.9	1.6	1.6	1.6	2.2	8.9
Adults Capital Equipment	1.5	1.5	1.5	1.5	1.5	7.5
Adult Social Care	1.5	1.5	1.5	1.5	1.5	7.5
PROPERTY	183.9	145.2	89.1	59.3	32.7	510.2
IT&D Hardware (incl accessibility equipment)	1.0	1.3	0.3	0.2	3.8	6.5
WAN / Wifi Refresh	-	-	0.3	-	-	0.3
IT&D Infrastructure (incl storage, processing & cyber security)	0.8	1.7	0.2	1.5	-	4.1
Replacement of the Corporate Phone System	0.1	0.1	0.1	0.9	0.1	1.4
Data Centre maintenance, renewals & replacements	0.1	0.1	0.1	0.1	0.1	0.3
Telephony System	-	-	-	0.5	-	0.5
CoSTAR SATELLITE STUDIO AND INCUBATOR SPACE	1.0	-	-	0.7	-	1.7
IT&D	2.9	3.2	1.0	3.8	4.0	14.8
TOTAL BUDGET	363.6	264.6	169.7	135.6	102.6	1,036.0
PIPELINE						
Pipeline	55.0	90.1	59.7	67.1	103.1	375.0
Your Fund Surrey	10.0	-	-	-	-	10.0
TOTAL PIPELINE	65.0	90.1	59.7	67.1	103.1	385.0
TOTAL CAPITAL PROGRAMME	428.6	354.7	229.4	202.7	205.6	1,421.0

Capital Programme - Financing 2025/26 to 2029/30

Funding Source	2024/25 £m	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	Total £m
Grants	105.0	105.7	65.3	103.4	146.2	525.6
External Contributions	27.8	12.7	10.4	7.3	4.4	62.7
Revenue	6.4	6.4	6.2	6.2	6.1	31.3
Funded Borrowing	54.4	33.8	31.2	13.3	1.5	134.2
Capital Receipts	28.4	25.8	9.8	9.4	8.5	81.9
Unfunded Borrowing	206.5	170.3	106.4	63.1	38.9	585.2
TOTAL FUNDING	428.6	354.7	229.4	202.7	205.6	1,421.0

SURREY COUNTY COUNCIL**CABINET****DATE: 26 NOVEMBER 2024****REPORT OF CABINET MEMBER: NATALIE BRAMHALL, CABINET MEMBER FOR PROPERTY, WASTE AND INFRASTRUCTURE****LEAD OFFICER: SIMON CROWTHER INTERIM EXECUTIVE DIRECTOR OF ENVIRONMENT, PROPERTY AND GROWTH****SUBJECT: BAGSHOT COMMUNITY RECYCLING CENTRE****ORGANISATION STRATEGY HIGH PERFORMING COUNCIL
PRIORITY AREA:****Purpose of the Report:**

The Report is to recommend the permanent closure of the Community Recycling Centre at Swift Lane, Bagshot GU19 5NJ (the 'Bagshot CRC') and that opening hours of the Community Recycling Centre at Wilton Road Camberley be extended by an extra day a week (Tuesday) to compensate.

This piece of work helps Surrey County Council meet its high performing council priority objective and No One Left Behind because it seeks to to remove a sub-standard facility from the waste estate whilst providing additional service capacity nearby and address ongoing harassment and intimidation of waste contractor SUEZ's staff.

Recommendations:

It is recommended that Cabinet:

1. Agree to the closure of the Community Recycling Centre (CRC) at Swift Lane, Bagshot and as a consequence agree to the opening of the CRC at Wilton Road, Camberley for an extra day a week (Tuesday).
2. Allow those residents of the Royal Borough of Windsor and Maidenhead who currently use the Bagshot CRC to use Lyne CRC, Chertsey as an alternative.

Reason for Recommendations:

The Bagshot CRC site is small, unmodernised and not fit for purpose. It is not an 'unsafe' site (SUEZ have obligations to keep the site safe and lawful) but there are hazards – for example, users of the site park their cars in the centre of the plot, and then walk across the path of moving vehicles to access the various waste containers.

The site has to close for container exchange, leading to inconvenience & a build-up of queues. There is no means of compacting waste in the containers which means that they will be taken off the site with spare capacity – creating more of a carbon

impact per tonne in terms of haulage and increased vehicle movements. These issues do not occur at modernised sites.

There is an ongoing pattern of vandalism, fly tipping and unlawful entry at the Bagshot CRC site which happens out of hours (i.e. when the CRC is closed and overnight). Staff have been threatened by (some) users of the site who are attempting to bring non-acceptable (potentially unlawful) material onto the site. Rather than confront the user, for their own safety, the staff have had to accept the waste as presented.

Fly tipping has occurred both within the site and outside of the entrance. The existing perimeter fencing does not present a sufficient barrier to these episodes, which often involve the use of mechanical equipment. Material fly tipped has in the past included hazardous materials such as asbestos. Prevention measures would be difficult and costly to implement and could include reinforced walls with climb prevention, enhanced 24 hr security guard presence and additional lighting.

SUEZ have recorded 801 instances of fly tipping across all Surrey CRC sites between January 2019 and August 2024. Of these, 531 (66%) were at Bagshot CRC. Of the other 14 sites, Lyne Lane CRC, near Chertsey, experienced 89 fly tipping incidents (11%) in the period. Fly tipping incidents at all of the other 13 sites combined make up the remaining 23%.

SCC's waste contractor, SUEZ, retain incident logs which have recorded 48 nuisance incidents (fly-tipping, break ins, vandalism, anti-social behaviour) at Bagshot CRC between 2nd January and 25th August 2024. No other SCC CRC suffers such high levels of nuisance-based disruption. This disruption impacts on site staff and users negatively, the site often having to close to allow remedial action. A summary of the SUEZ incident logs is included at Annex C.

Despite the high levels of disruption, a review of complaints received from users of the site by SUEZ since January 2023 shows that 23 complaints have been recorded across the CRC estate, none of which relate to Bagshot CRC. SUEZ believe that this reflects the empathy felt by users for the on-site staff, recognising the difficulties the site presents.

The access road is narrow and itself suffers from fly tipping.

Swift lane is not accessible on foot, so closure won't impact pedestrian visitors.

The nearest alternative site is Camberley CRC which is approximately 6 miles away from the Bagshot CRC and has a travel time between the two sites (by car) of approximately 15 minutes. Alternative CRC sites are located within 10 miles

Analysis undertaken by SCC's Transport Modelling specialists shows that the Swift Lane CRC in Bagshot is the closest CRC to 12,428 households. If the Bagshot CRC was to close:

- 7,894 (63.5%) would see no increase in drive time when accessing the nearest alternative CRC (Lyne, Woking or Camberley) if the Bagshot site was to close; and

- 4,544 (36.5%) would have a maximum drive time of 20 minutes (covering 7.8 miles) to their nearest alternative CRC site.

A map marked up with postcode 'clusters' in the Bagshot CRC catchment area showing the closest alternative sites is included at Annex D

The site is owned by Surrey Heath Borough Council (SHBC) who lease it to SCC. The site will be returned to SHBC if it closed.

Executive Summary:

Rationale For Closure

1. The Bagshot CRC site is unmodernised and not split level meaning that members of the public need to climb steps in order to place items in the collecting containers. Containers are placed around the perimeter of the site which also means that car parking is in the centre of the site and cars and members of the public are therefore crossing each other's paths. Any required movement of waste containers can only take place when the site is closed. Although SCC's waste contractor (SUEZ) keep the site safe, it has inherent problems which are not present at other CRCs which are on split level.
2. For many years, Bagshot CRC has suffered from overnight vandalism and unlawful ingress. Containers (particularly those for electricals) are regularly forced open and plundered, and the site office has been vandalised. The perimeter fence has been driven into and fly tipping has been left both outside of the gates and tipped over fences. Prevention measures would be difficult and costly to implement and could include reinforced walls with climb prevention, enhanced 24 hr security guard presence and additional lighting.
3. A number of local residents have made threats to SUEZ's staff as well as delivered materials to the CRC which are not allowed. SUEZ's staff have to 'turn a blind eye' to some of these behaviours as they are threatened with violence if they try to object.
4. SCC Officers and Suez management are acutely aware of the position at this CRC and put in place such mitigation and staff protection measures as reasonably practicable. Unfortunately Bagshot CRC remains not fit for purpose and potentially risky and hazardous.
5. The size and shape of the site are such that it could not be modernised and redeveloped as a split level site, as this would require the construction of a raised area and access ramps leaving insufficient space for waste containers, container movements and parking for site staff.
6. If the recommendation is accepted, users of Bagshot CRC would be directed to alternative CRC sites in Camberley, Chertsey and Woking. The nearest site to Bagshot CRC is Wilton Road CRC, Camberley.

7. Some nearby residents of the Royal Borough of Windsor and Maidenhead (RBWM) use Bagshot CRC with the permission of SCC, and a proportional contribution to its operational costs is made by the Borough council. If the recommendation is accepted, RBWM residents would be directed to Lyne CRC, Chertsey and a proportion of its operational costs would be recharged to RBWM based on the number of visits from the Borough.
8. The site is owned by Surrey Heath Borough Council (SHBC) who lease it to SCC. The site will be returned to SHBC if it closed. SCC understands that SHBC has an alternative tenant interested in the site who will take over once SUEZ have vacated the site and SCC surrendered the head lease. The exact date of closure (if agreed) will be determined following the Cabinet Decision set out above.

Link to Strategic Waste Infrastructure Plan

9. The Council, as the statutory Waste Disposal Authority ('WDA'), is responsible for the bulking, transport, treatment, and disposal of all household collected waste by the eleven District and Boroughs of Surrey (referred to as statutory Waste Collection Authorities) and also the disposal of waste delivered to the County's 15 Community Recycling Centres ('CRCs').
10. A report provided to Cabinet in April 2023 set out future plans for strategic waste developments to increase capacity and modernise the waste infrastructure in Surrey. The report mainly dealt with the development of new assets, including waste transfer stations and a new Material Recovery Facility.
11. The county's 15 CRCs were not specifically discussed in the Report: at the time there was no intention to increase or decrease the number of CRCs in Surrey, although it is noted that five CRCs (including Bagshot CRC) are unmodernised and at an appropriate time in the future would benefit from investment and/or replacement. Modern CRCs tend to be on split level sites and future requirements from DEFRA set out the potential for increased separation of waste materials (i.e. more waste containers required).
12. The recommendation to close Bagshot CRC is made knowing that alternative nearby sites with capacity exist, and that the Bagshot CRC is unmodernised and too small to be upgraded for future requirements. This, together with the issues set out above, support the recommendation to close the site.

Consultation:

13. SCC waste contractor SUEZ has been consulted on the closure and has expressed support for the proposal.

14. A public consultation was carried out for a period of four weeks commencing on Monday 16th September and concluding on Friday 11th October. A total of 1079 responses were received.
15. A copy of the consultation document is included at Annex A. An analysis of responses is included at Annexes B1 and B2. The consultation showed that 93% of respondents were opposed to the closure of Bagshot CRC and that in the event of closure 76% of respondents would use the proposed alternative sites at Camberley, Lyne and Woking.
16. A total of 305 responses (28.26%) were from non-Surrey residents in the Royal Borough of Windsor and Maidenhead (RBWM). Surrey County Council allows residents of RBWM to use Bagshot CRC. This arrangement is a concession to RBWM as SCC has no obligation to allow non-Surrey residents access to any of its CRCs. At the time of the consultation, no decision had been made to allow RBWM residents access to Lyne CRC as an alternative which could account for some of the consultation responses which were against closure. Free text responses to the consultation from RBWM residents requested access to Lyne CRC if Bagshot CRC was closed.
17. Analysis of open text responses (Annex B2) showed reasons for opposition included the following concerns:
- Inconvenience caused by increased travelling distances to alternative sites (particularly for residents of RBWM)
 - A perception that increased queueing was likely at alternative sites
 - Environmental concerns (e.g. increased carbon emissions)
 - A perception that Bagshot CRC offers a better service (because it is less busy)
 - Increased fly tipping in the local area
 - Reallocation of operational savings following closure
18. SCC's experience shows that previous changes to CRC facility provision such as reduced opening hours and days have not resulted in any increased fly-tipping. (As noted above, Bagshot CRC has the highest fly-tipping incidence of the CRCs in Surrey.)
19. Windlesham Parish Council have raised an objection to the closure of Bagshot CRC voicing concerns that congestion will increase at Camberley CRC, the closure will result in increased fly-tipping and that it will inconvenience local residents disproportionately.
20. The catchment area for Bagshot CRC includes 12,428 households. ONS population estimate data shows that on average, each household in Surrey Heath is comprised of 2.51 people and that 78.2% of the population are aged 18 and over. From this it is estimated that 24,535 residents aged 18 and over live in the area served by Bagshot CRC. Based on this,

approximately 3% of Surrey residents served by Bagshot CRC engaged in the consultation process.

Risk Management and Implications:

21. There are no specific risks involved in the closure of a CRC. Closure of Bagshot CRC decreases the following risks to SCC:
- Injury or harm to a member of staff, council employee, or contractor;
 - Vandalism and unlawful ingress to Council property;
 - Environmental damage as a result of vandalism (e.g. oil spills on site because oil containers are damaged);
 - Abuse or threatening behaviour to a member of the public, member of staff or contractor; and
 - Reputational damage as a result of the above.

Financial and Value for Money Implications:

22. The revenue costs for the closure of the site are estimated to be a one-off cost of £20,000. No Capital is required.
23. The estimated running costs for Bagshot CRC for 2024/25 are £145,000. However additional costs for opening the Camberley site for an additional day per week have been confirmed by SUEZ as £40,000 per annum resulting in a small annual revenue saving of £105,000.
24. For the avoidance of doubt, the recommendation to close Bagshot CRC is not to achieve financial savings. Such savings are a low-value consequence of the closure and are largely due to reduced security costs.

Section 151 Officer Commentary:

25. The Council continues to operate in a very challenging financial environment. Local authorities across the country are experiencing significant budgetary pressures. Surrey County Council has made significant progress in recent years to improve the Council's financial resilience and whilst this has built a stronger financial base from which to deliver our services, the cost of service delivery, increasing demand, financial uncertainty and government policy changes mean we continue to face challenges to our financial position. This requires an increased focus on financial management to protect service delivery, a continuation of the need to deliver financial efficiencies and reduce spending in order to achieve a balanced budget position each year.
26. In addition to these immediate challenges, the medium-term financial outlook beyond 2024/25 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 the stable provision of services in the medium term.

27. The proposed closure of the Community Recycling Centre at Swift Lane, Bagshot is forecast to give rise to a net annual revenue saving of £0.1m which will be taken into account in the Council's Medium Term Financial Strategy. As such, the S151 Officer supports the recommended approach.

Legal Implications – Monitoring Officer:

28. Under the Environmental Protection Act 1990, Surrey County Council, as a waste disposal authority, has a duty to provide places where residents in its area may dispose of household waste. Each place that is provided must be reasonably accessible to residents and open at reasonable times. Cabinet will need to consider whether the alternative arrangements set out in this report enable those duties to be met.
29. Cabinet will note that those residents who responded to the public consultation overwhelmingly opposed the proposed closure of the site. Cabinet must conscientiously consider the outcome of that consultation. In doing so however, Cabinet should also consider other relevant considerations such as any impact on budget and safety risks associated with the proposal. The weight to be given to each relevant consideration is for the cabinet to decide.
30. The Council's contractor, Suez, supports the recommendation. Therefore there would be no adverse impact on existing contractual arrangements.
31. The Public Sector Equality Duty (section 149 Equality Act 2010) equally applies to this decision. There is a need 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. These matters are dealt with in the equality and diversity paragraphs of the report and the appended equality impact assessment. Members will see that no negative impacts on those with protected characteristics have been identified save for a slightly longer journey time to an alternative site.

Equalities and Diversity:

32. An Equality Impact Assessment (EIA) has been prepared for the proposal. A summary of key impacts and mitigations is set out below.
- The closure of the site would not impact or disadvantage any group more than any other and affects all current users of the site.
 - All of the alternative sites are more accessible, split-level sites and do not require the use of steps to access waste containers.

- The alternative site at Woking includes a Revive Reuse shop providing opportunities for an enhanced visitor experience.
- Users of the Bagshot site must cross vehicle routes through the site to access waste containers which presents a hazard. All of the proposed alternative sites are designed such that vehicles are unloaded next to waste containers, negating the need for users to come into potential conflict with other users' vehicles.
- Use of the proposed alternative sites would have a relatively small impact on journey times and distances and only a relatively small cohort of users would see increased journey times to alternative sites.
- If Bagshot CRC is closed, the alternative site in Camberley will be opened for an additional day each week meaning that this site is available seven days per week. Bagshot CRC is open only four days per week (Saturday to Tuesday inclusive).
- SUEZ will redeploy staff from Bagshot CRC to resource the additional opening hours at Camberley CRC and to provide additional assistance for site users at all three alternative sites.
- The Resources and Circular Economy Team will work with Surrey Heath Borough Council (SHBC) to monitor fly tipping in Bagshot following closure of the CRC. However, it should be noted that SHBC and/or the Environment Agency would be responsible for clearance and enforcement action (dependant on scale) where waste is fly tipped on the highway or public land.
- SUEZ will monitor compliments and complaints from site users to identify whether any service improvements could be introduced to further mitigate the impact of the closure.

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 below.

Area assessed:	Direct Implications:
Corporate Parenting/Looked After Children	None
Safeguarding responsibilities for vulnerable children and adults	None
Environmental sustainability	Recent evidence shows that approximately 920 visits are made to Bagshot CRC per week. Modelling undertaken by the Transport Studies Team shows that 36.53 % of the users of the Bagshot site would have to travel up to 20 minutes or 7.8 miles to the closest alternative site if Bagshot CRC closed. The impact of this marginal increase in travel would be the generation of an additional 58 Tonnes of CO2 annually (based on 211g CO2 /mile). However, it is anticipated that a proportion of recyclable waste which would otherwise have been taken to Bagshot CRC, would instead be deposited in bins for kerbside collection, reducing the number of journeys. The Bagshot CRC site and all alternative sites are located outside of Air Quality Management Areas.
Compliance against net-zero emissions target and future climate compatibility/resilience	Please see above. The proposal would cause a small increase CO2 emissions associated with increased travel distances to and from alternative sites
Public Health	None

What Happens Next:

34. Timescale for closure

- a. SCC serve lease surrender notice to Surrey Heath Borough Council (SHBC) in December 2024
- b. SCC instruct SUEZ to submit environmental permit surrender application.
- c. Lease requires three months notice of surrender. However, SHBC have a potential tenant who has expressed an interest in leasing the site when SCC close the site. SHBC require two months to market the site to ensure best value, after which the potential tenant can enter into a lease with SHBC. It is understood that this process is under way.
- d. Subject to SHBC approval, it is anticipated that Bagshot CRC will close immediately prior to the new tenant moving onto the site. This is likely to take place in December 2024
- e. Residents will be informed of the closure via a press release, site notices, social media posts and the SCC website

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Report Author: Steven Foster Interim Director of Waste,
steven.foster@surreycc.gov.uk

Consulted:

Residents through public consultation

Annexes:

Annex A – Public consultation questionnaire

Annex B – Analyses of responses to public consultation

Annex C – SUEZ incident log for Swift Lane CRC

Annex D – A map marked up with postcode ‘clusters’ in the Bagshot CRC catchment area showing the closest alternative site

Annex E- Equality Impact Assessment

Sources/background papers:

Cabinet Report: April 2023 – Strategic Waste Infrastructure

Bagshot Swift Lane Community Recycling Centre Consultation

In 2019, Surrey County Council consulted on the potential closure of up to six Community Recycling Centres (CRCs) to achieve cost savings. This included the operation at Bagshot Swift Lane. At this time, members decided to retain two sites and review the operation at four others, including Bagshot.

Following a recent review of the operation, Surrey County Council is recommending the closure of Bagshot Community Recycling Centre (CRC) due to

- **Condition** - the site is difficult to access, unmodernised and too small to be upgraded to a modern split-level site, so it cannot be made fit for future, in line with the Council's mid-term Waste Strategy.
- **Low usage** – it is one of the county's smallest sites for public recycling, handling just 2% (c.1,700 tonnes) of the county's CRC waste each year.
- **Safety concerns** - the site has suffered from repeated incidences of antisocial behaviour including, overnight vandalism and fly tipping. Users must also cross vehicle circulation areas to access the waste bins.

There are four alternative Community Recycling Centres within 10 miles of Bagshot, with the closest being Camberley, approximately six miles away. These sites are modern, safe and all on one level, with no need to climb steps to tip waste. These sites allow access to vans and trailers, and also accept more types of waste. Some sites offer additional services such as a paint reuse shop at Guildford CRC and a reuse shop at Woking CRC.

The closure of the Bagshot Community Recycling Centre is recommended but has not yet been confirmed. We want any decision on the future of CRC services in the area to be fully informed by the impact residents tell us this would have on them.

We are inviting residents to take part in a consultation to let us know how they currently use the site and express their views on what alternative service arrangements they would like going forward, such as increasing opening hours at alternative Community Recycling Centres.

Why your views matter

Your views will be considered in the recommendation to Cabinet and by the Cabinet itself when it makes the decision.

Your responses are anonymous and completing this survey should take no more than five minutes. We would like to know where you are responding from, so please do provide a post code.

Privacy statement

All responses are strictly confidential, and your data will be used in-line with our data protection policy which can be found online: <https://www.surreycc.gov.uk/council-and-democracy/your-privacy>

Annex A

Questionnaire

1. What is your name?

2. What is your email address?

3. What is your organisation?

4. Are you responding as

(Required)

Please select all that apply

- an individual resident
- a democratically elected representative (e.g. councillor or Member of Parliament)
- other (please specify below)

5. If other selected, please specify:

6. Which district or borough in Surrey do you live in?

(Required)

- Elmbridge
- Epsom and Ewell
- Guildford
- Mole Valley
- Reigate and Banstead
- Runnymede
- Spelthorne

Annex A

- Surrey Heath
- Tandridge
- Waverley
- Woking
- Other – I am not a resident of Surrey (please specify)

7. If other selected, please specify:

8. How frequently do you use the Bagshot Community Recycling Centre?

(Required)

- Several times a week
- About once a week
- About once a month
- About once every three months
- About once every six months
- About once every year
- Less often than once a year
- Never
- Don't know

9. Have you ever used any of the following Community Recycling Centres? Please select all that apply

(Required)

- Camberley CRC, Wilton Road, Camberley GU15 2QW
- Woking CRC, Martyrs Lane, Woking GU21 5NJ
- Chertsey CRC, Lyne Lane, Lyne, Chertsey KT16 0AR
- Guildford CRC, Moorfield Road, Slyfield Green Industrial Estate, Guildford GU1 1RU
- Maidenhead Household Waste site (Braywick Recycling and Refuse Centre), Stafferton Way, Maidenhead SL6 1AY
- None of the above

10. If the Community Recycling Centre (CRC) at Swift Lane Bagshot were to permanently close, which one of the following alternative CRC sites would you be most likely to use?

(Required)

- Camberley CRC, Wilton Road, Camberley GU15 2QW (Approximately 6 miles from Bagshot CRC)
- Woking CRC, Martyrs Lane, Woking GU21 5NJ (Approximately 8 miles from Bagshot CRC)
- Chertsey CRC, Lyne Lane, Lyne, Chertsey KT16 0AR (Approximately 9 miles from Bagshot CRC)
- Guildford CRC, Moorfield Road, Slyfield Green Industrial Estate, Guildford GU1 1RU (Approximately 10 miles from Bagshot CRC)
- Other (please specify)
- None of the above

9

11. Do you support the proposal to close the Community Recycling Centre (CRC) at Swift Lane Bagshot?

(Required)

- Support
- Support with conditions
- Do not support
- Don't know

12. If selected 'support with conditions', what are these conditions? Please suggest any alternative service arrangements that you would like us to consider.

(Required)

13. Is there anything else you think we should consider or that you would like to share about this proposal?

About you

It would be very helpful if you could complete the following questions. This will help us see how people in different circumstances view our proposal. All questions are optional, and you can skip any you do not wish to answer. You can read more on how we process personal information through our corporate privacy notice: <https://www.surreycc.gov.uk/council-and-democracy/your-privacy/corporate-privacy-notice>

14. What age group are you in?

- Under 18
- 18-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65-74
- 75-84
- 85+

15. Do you have a long-standing illness or disability (physical or mental impairment that has a 'substantial' and 'long-term' negative effect on your ability to do normal daily activities)?

- Yes
- No
- Prefer not to say

16. What is your ethnic group?

- White - British, English, Northern Irish, Scottish or Welsh

Annex A

- White - Irish
- White - Gypsy or Irish Traveller
- Any other White background
- White and Black Caribbean
- White and Black African
- White and Asian
- Any other mixed or multiple ethnic background
- Asian or Asian British - Indian
- Asian or Asian British - Pakistani
- Asian or Asian British - Bangladeshi
- Asian or Asian British - Chinese
- Any other Asian background
- Black or Black British - Caribbean
- Black or Black British - African
- Any other black British, Caribbean or African background
- Arab
- Other ethnic group (please specify below)
- Prefer not to say

17. What is your postcode?

Bagshot Swift Lane Community Recycling Centre Consultation

<https://www.surreysays.co.uk/environment-infrastructure-and-growth/bagshotcommunityrecyclingcentre>

This report was created on Wednesday 16 October 2024 at 14:14

The activity ran from 16/09/2024 to 11/10/2024

Responses to this survey: **1079**

1: What is your name?

Name

There were 1058 responses to this part of the question.

2: What is your email address?

Email

There were 1045 responses to this part of the question.

3: What is your organisation?

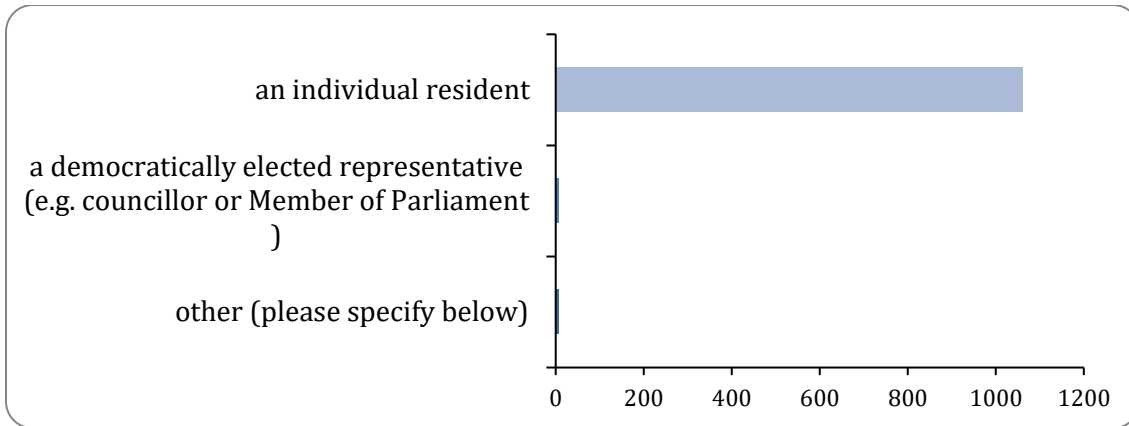
Organisation

There were 492 responses to this part of the question.

4: Are you responding as

Are you:

There were 1079 responses to this part of the question.



Option	Total	Percent
an individual resident	1070	99.16%
a democratically elected representative (e.g. councillor or Member of Parliament)	6	0.56%
other (please specify below)	8	0.74%
Not Answered	0	0.00%

9

5: If other selected, please specify:

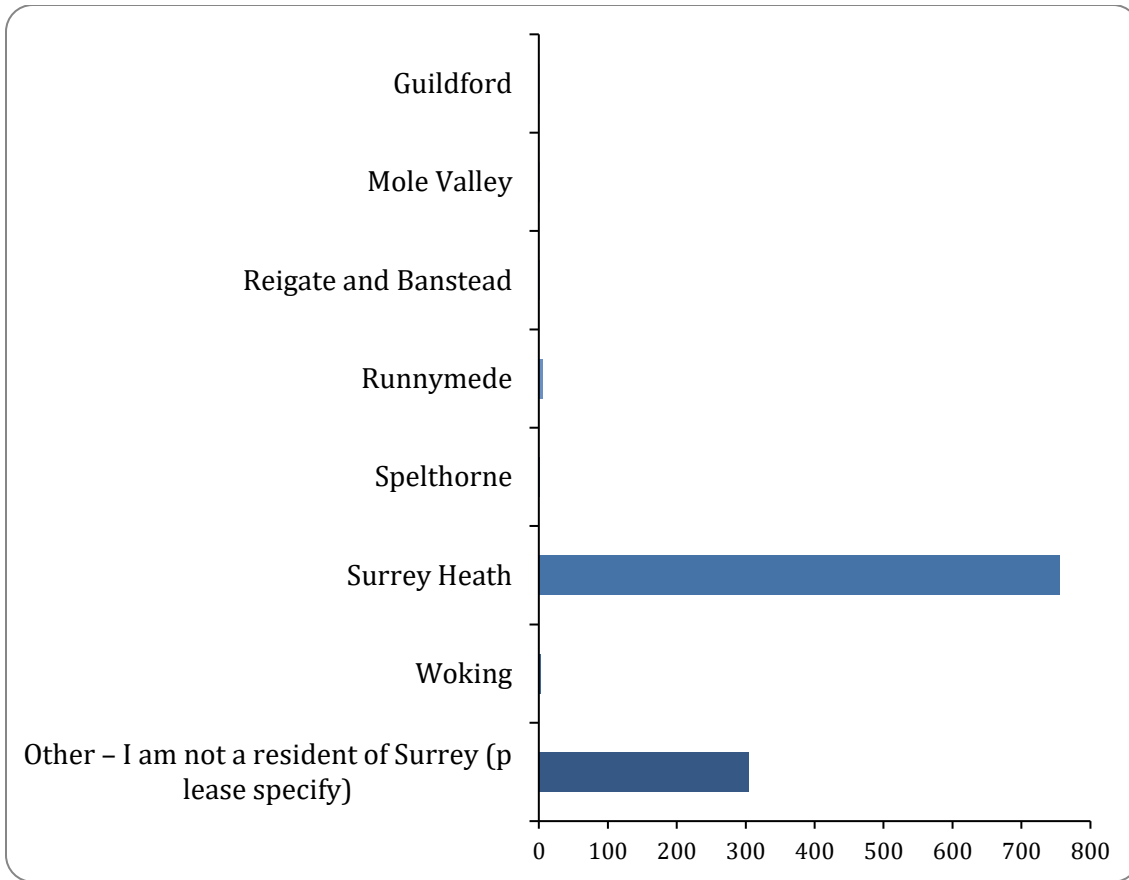
If other selected, please specify

There were 24 responses to this part of the question.

6: Which district or borough in Surrey do you live in?

Location of respondent

There were 1079 responses to this part of the question.



Option	Total	Percent
Elmbridge	0	0.00%
Epsom and Ewell	0	0.00%
Guildford	1	0.09%
Mole Valley	1	0.09%
Reigate and Banstead	1	0.09%
Runnymede	5	0.46%
Spelthorne	1	0.09%
Surrey Heath	763	70.71%
Tandridge	0	0.00%
Waverley	0	0.00%
Woking	2	0.19%
Other – I am not a resident of Surrey (please specify)	305	28.26%
Not Answered	0	0.00%

7: If other selected, please specify:

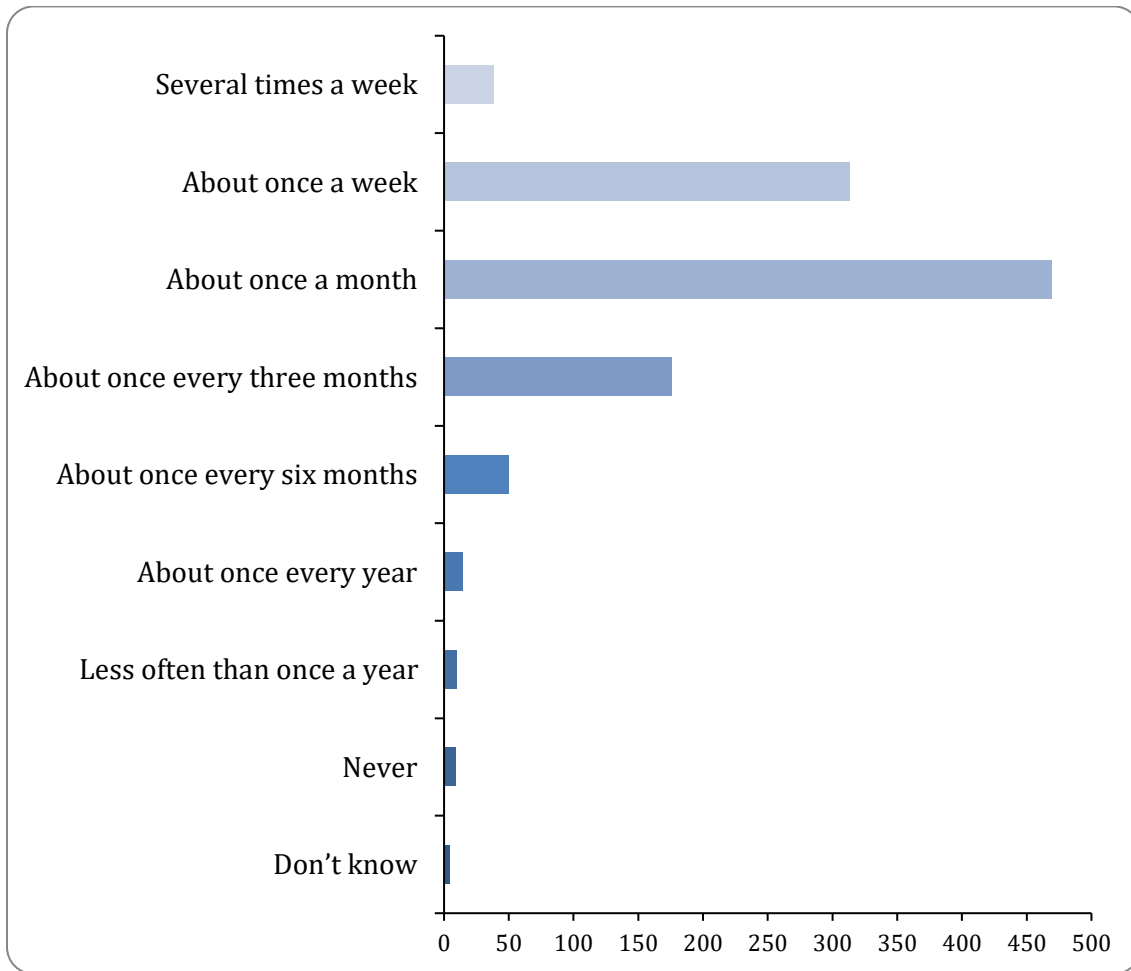
If other selected, please specify

There were 307 responses to this part of the question.

8: How frequently do you use the Bagshot Community Recycling Centre?

How often do you use the centre

There were 1079 responses to this part of the question.



Option	Total	Percent
Several times a week	39	3.61%
About once a week	313	29.01%
About once a month	465	43.10%
About once every three months	174	16.13%
About once every six months	51	4.73%



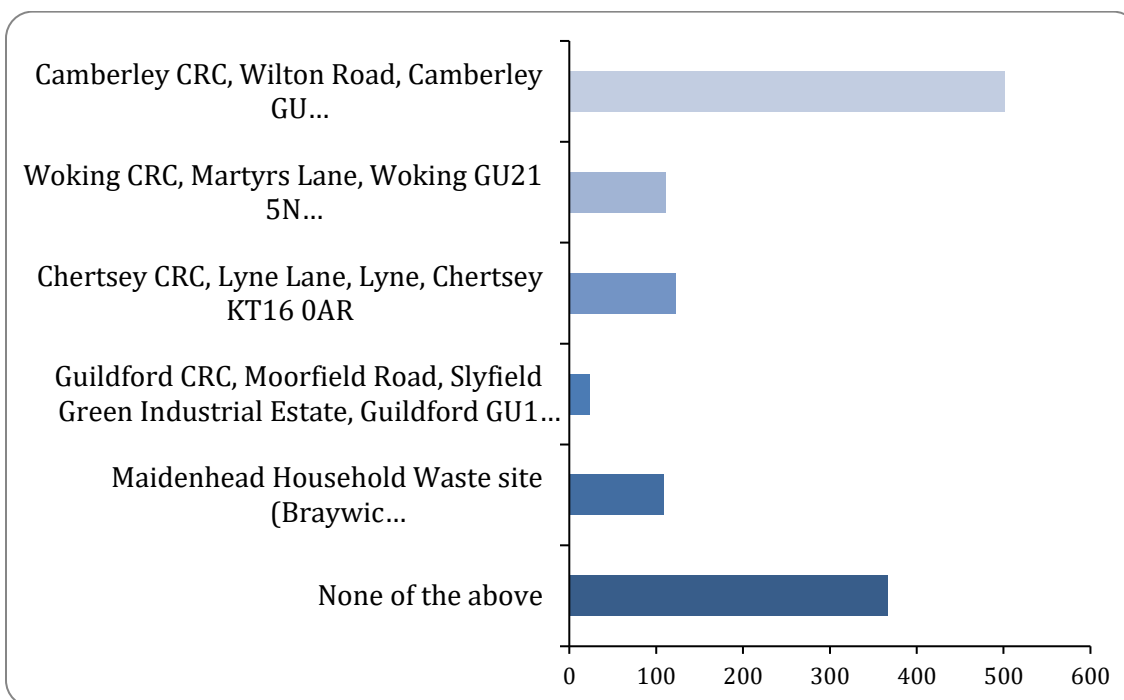
About once every year	14	1.30%
Less often than once a year	10	0.93%
Never	9	0.83%
Don't know	4	0.37%
Not Answered	0	0.00%

9: Have you ever used any of the following Community Recycling Centres?

Please select all that apply

Have you ever used any of the following centres?

There were 1079 responses to this part of the question.



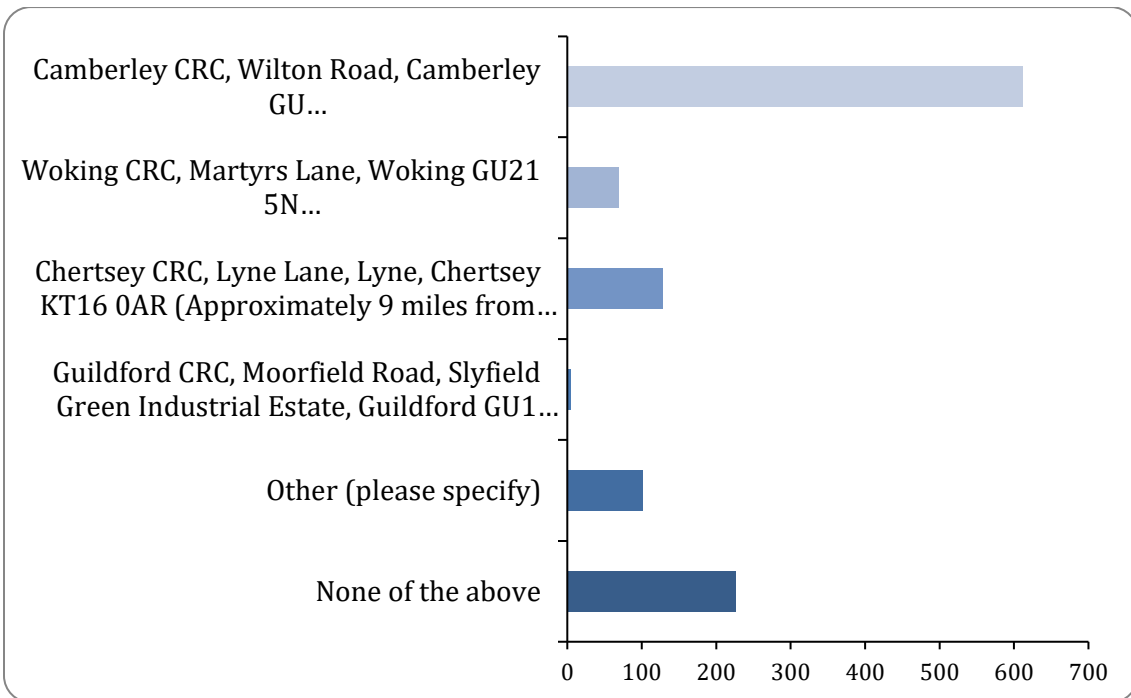
Option	Total	Percent
Camberley CRC, Wilton Road, Camberley GU15 2QW	506	46.90%
Woking CRC, Martyrs Lane, Woking GU21 5NJ	111	10.29%
Chertsey CRC, Lyne Lane, Lyne, Chertsey KT16 0AR	124	11.49%
Guildford CRC, Moorfield Road, Slyfield Green Industrial Estate, Guildford GU1 1RU	24	2.22%
Maidenhead Household Waste site (Braywick Recycling and Refuse Centre), Stafferton Way, Maidenhead SL6 1AY	109	10.10%

None of the above	370	34.29%
Not Answered	0	0.00%

10: If the Community Recycling Centre (CRC) at Swift Lane Bagshot were to permanently close, which one of the following alternative CRC sites would you be most likely to use?

If the centre was to permanently close, which alternative site would you use?

There were 1079 responses to this part of the question.



Option	Total	Percent
Camberley CRC, Wilton Road, Camberley GU15 2QW (Approximately 6 miles from Bagshot CRC)	618	57.28%
Woking CRC, Martyrs Lane, Woking GU21 5NJ (Approximately 8 miles from Bagshot CRC)	69	6.39%
Chertsey CRC, Lyne Lane, Lyne, Chertsey KT16 0AR (Approximately 9 miles from Bagshot CRC)	130	12.05%

Guildford CRC, Moorfield Road, Slyfield Green Industrial Estate, Guildford GU1 1RU (Approximately 10 miles from Bagshot CRC)	5	0.46%
Other (please specify)	102	9.50%
None of the above	227	21.04%
Not Answered	0	0.00%

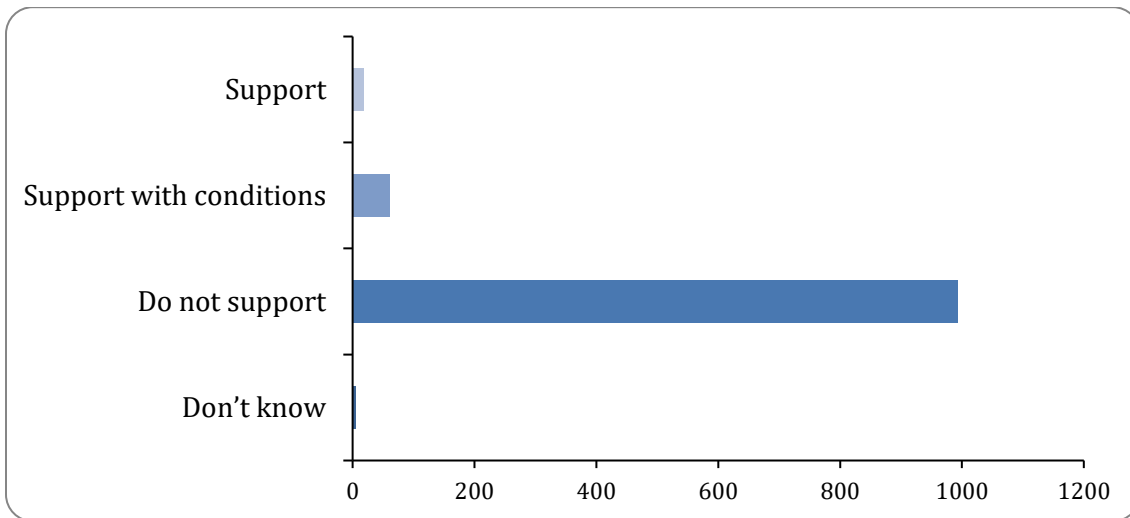
Which alternative site would you use?

There were 229 responses to this part of the question.

11: Do you support the proposal to close the Community Recycling Centre (CRC) at Swift Lane Bagshot?

Do you support the closure?

There were 1071 responses to this part of the question.



Option	Total	Percent
Support	18	1.68%
Support with conditions	62	5.75%
Do not support	1001	92.77%
Don't know	5	0.46%
Not Answered	0	0.00%

12: If selected 'support with conditions', what are these conditions? Please suggest any alternative service arrangements that you would like us to consider.

enter text into the box below

There were 1072 responses to this part of the question.

13: Is there anything else you think we should consider or that you would like to share about this proposal?

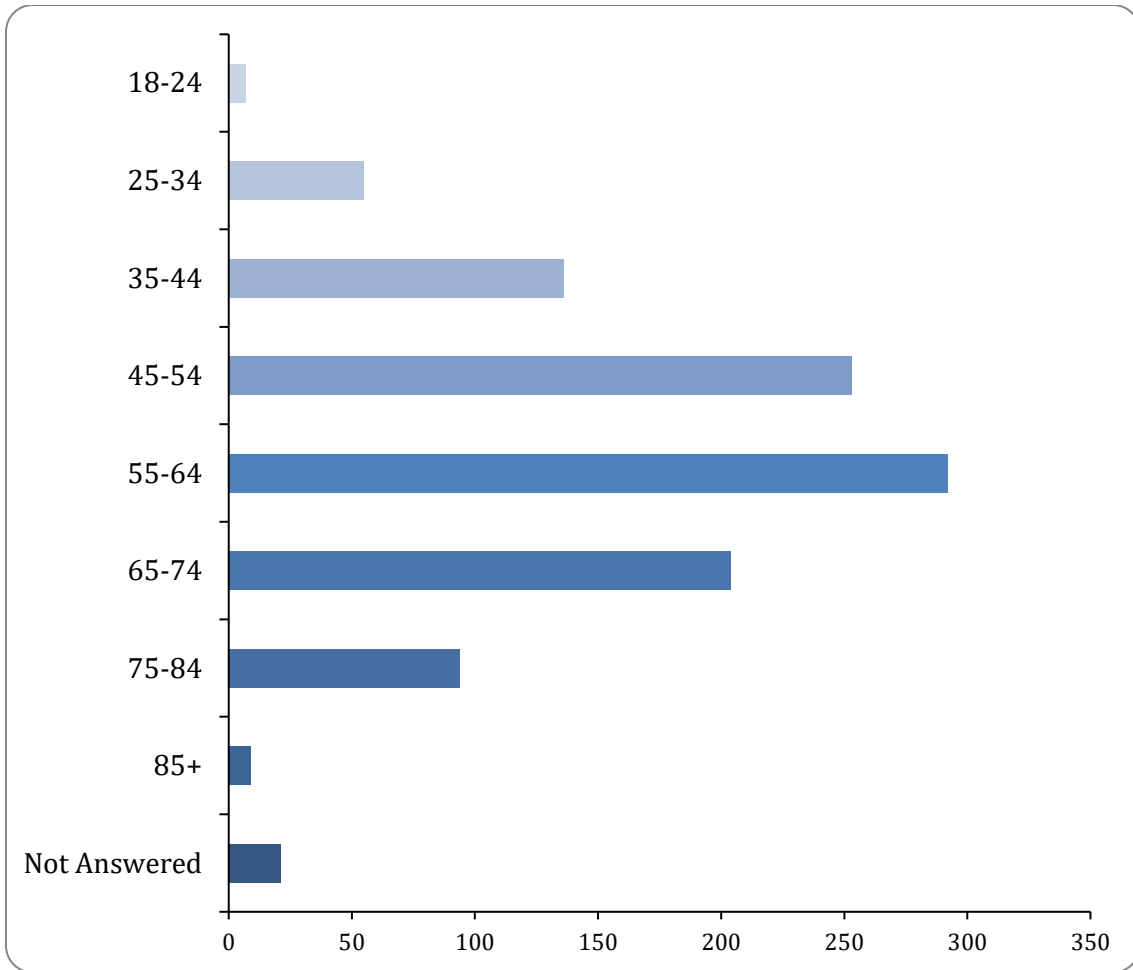
enter text into the box below

There were 770 responses to this part of the question.

14: What age group are you in?

Age group

There were 1058 responses to this part of the question.

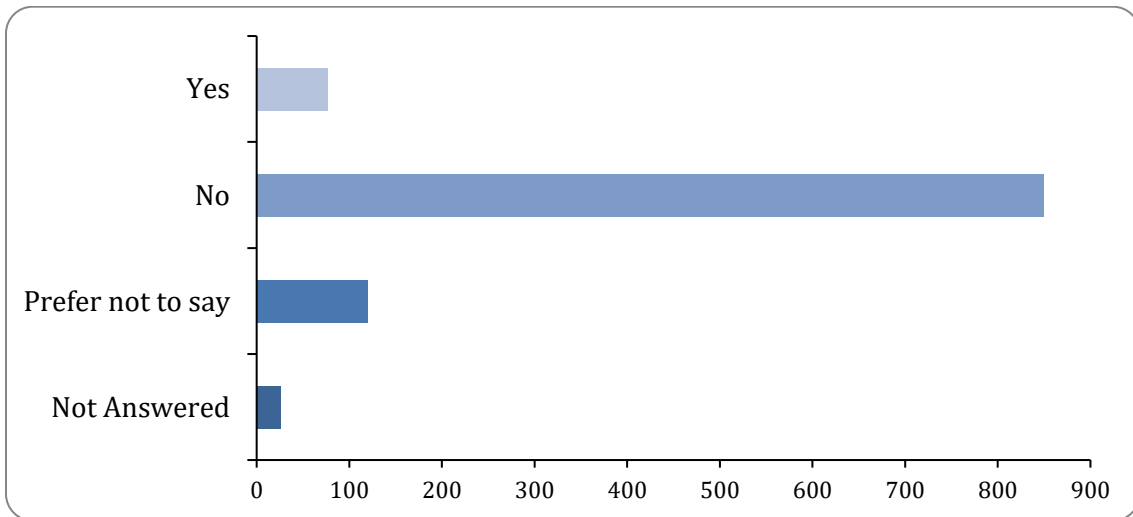


Option	Total	Percent
Under 18	0	0.00%
18-24	7	0.65%
25-34	55	5.10%
35-44	136	12.60%
45-54	253	23.45%
55-64	292	27.06%
65-74	206	19.09%
75-84	98	9.08%
85+	11	1.20%
Not Answered	21	1.95%

15: Do you have a long-standing illness or disability (physical or mental impairment that has a 'substantial' and 'long-term' negative effect on your ability to do normal daily activities)?

Do you have a longstanding illness or disability impacting ability to do day to day activities

There were 1052 responses to this part of the question.

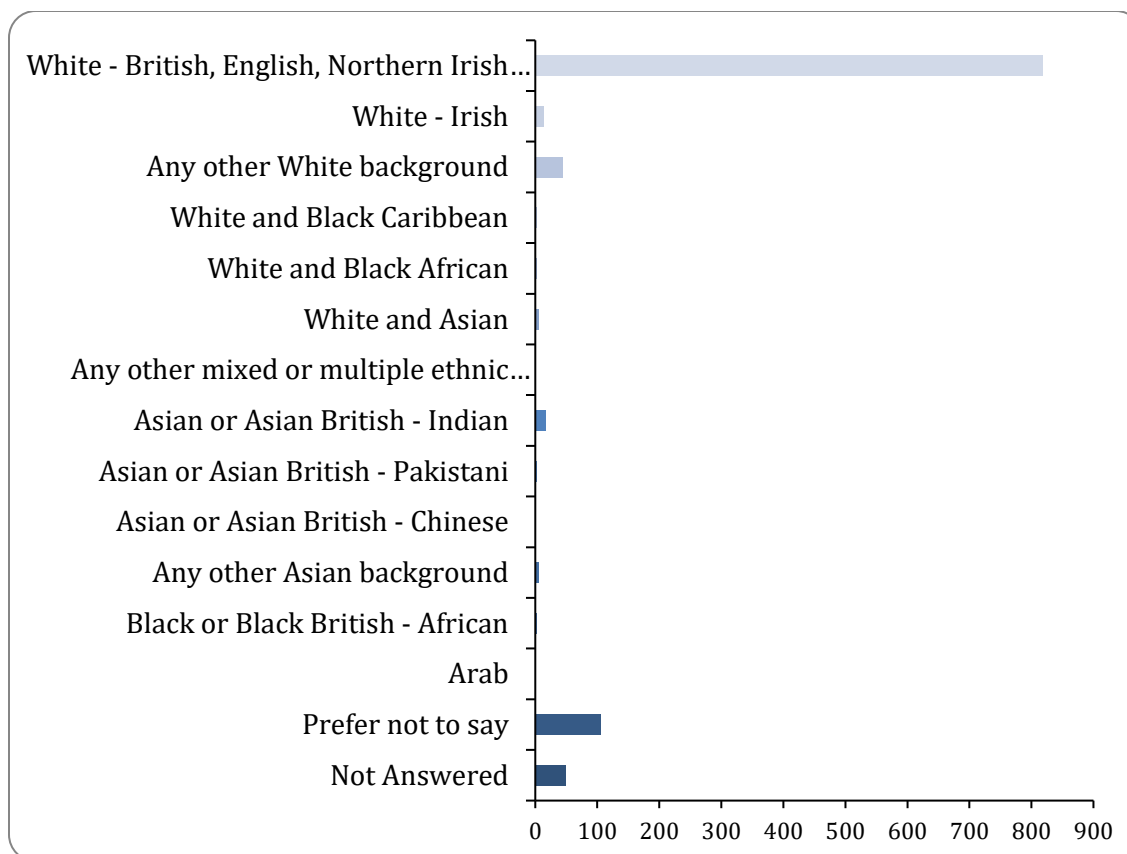


Option	Total	Percent
Yes	77	7.14%
No	857	79.43%
Prefer not to say	120	11.12%
Not Answered	27	2.50%

16: What is your ethnic group?

Ethnic group

There were 1029 responses to this part of the question.



Option	Total	Percent
White - British, English, Northern Irish, Scottish or Welsh	825	76.46%
White - Irish	14	1.30%
White - Gypsy or Irish Traveller	0	0.00%
Any other White background	45	4.17%
White and Black Caribbean	2	0.19%
White and Black African	2	0.19%
White and Asian	5	0.46%
Any other mixed or multiple ethnic background	1	0.09%
Asian or Asian British - Indian	17	1.58%
Asian or Asian British - Pakistani	3	0.28%
Asian or Asian British - Bangladeshi	0	0.00%
Asian or Asian British - Chinese	1	0.09%
Any other Asian background	5	0.46%
Black or Black British - Caribbean	0	0.00%
Black or Black British - African	2	0.19%
Any other black British, Caribbean or African background	0	0.00%
Arab	1	0.09%

Other ethnic group (please specify below)	0	0.00%
Prefer not to say	106	9.82%
Not Answered	49	4.54%

17: What is your postcode?

Postcode

There were 1035 responses to this part of the question.

Bagshot Swift Lane Community Recycling Centre Consultation

Dates: 16th September – 11th October 2024

Number of responses: 1071

Open-text analysis

We have used AI assisted thematic analysis for the open-ended responses.

12. If selected 'support with conditions', what are these conditions? Please suggest any alternative service arrangements that you would like us to consider.

- **Opposition to Closure:**
 - "I do not support the proposal to close it down."
 - "I most definitely do not support the closure."
 - "I do not support the closure of the site"
- **Accessibility and Convenience:**
 - "The site is less than 10 minutes away from Ascot residents whereas the Maidenhead site is over 30 minutes away."
 - "It is convenient. Always well used and easily accessible."
 - "I can use this site without making it a special journey."
 - "This is closest and easiest to access and never had to queue for 30 min to access the size like in Camberley."
- **Environmental Concerns:**
 - "This means more pollution, and more road congestion - which is a significant detractor from the overall goals of recycling - i.e. being environmentally conscious."
 - "Where is the logic in making SL5 resident drive 20+ miles to recycle. The damage we cause the environment, let alone the risk to human life and the time nobody has free, we will simply stop recycling."
 - "It would add volume of cars on the already very busy A30 section from Bagshot to Camberley and more emissions which I thought Surrey Heath wanted reduced."
 - "I don't want to drive further as it really is not good for the environment. It defeats the object of recycling."
 - "There is always a large queue at Camberley which is the nearest alternative site 6 miles away and can take over an hour to get there."
 - "We need to encourage and enable more recycling as household consumption rises and valuable materials need to be kept in circulation"

- **Community Impact:**
 - “RBWM residents are not welcome at the second nearest recycling centre in Bracknell as there is no agreement between RBWM and Bracknell Forest.”
 - “The whole of Ascot is bereft of any sensible local recycling options.”
 - “Whilst small, Bagshot Recycling services a widespread community.”
 - “If it were to close completely, it would cause huge problems for local residents, plus travelling to Camberley”
 - “Residents of Ascot, Sunningdale & Sunninghill to be given access to Lyne, otherwise we have a 22 mile round trip to Maidenhead.”
- **Staff and Service Quality:**
 - “The Bagshot centre is staffed by committed, friendly and dedicated staff who have been working there for years and are happy to give advice.”
 - “I haven’t had this experience at the larger, more modern, sites which tend to be less well staffed.”
 - “The site is not difficult to access and seems to function well.”
- **Suggestions for Improvement:**
 - “If it were modernised and made safer it would get even more use.”
 - “Opening the site for longer, widening the road, making gardening collection free which is a large proportion of the regular usage of the site.”
 - “Perhaps the whole site could be moved away from the existing housing/business alongside it into this field and expanding it into a more modern and safer, user-friendly site?”
 - “Consider an arrangement with Bracknell council so those in the sunnings and Ascot can use Bracknell.”
 - “Accept more types of rubbish like it used to, i.e., plaster board and rubble.”
 - “Let SL5 residents use Camberley site.”
 - “You could reduce the opening times to weekends only.”
- **Concerns About Fly Tipping:**
 - “This will cause even more fly tipping as people will not want to drive 6 miles to go to the nearest tip in Camberley.”
 - “The closure of this site would encourage fly tipping in the surrounding area.”
 - “I fear fly tipping will become a greater issue with the additional costs this will bring to the council.”
 - “Closing will push more traffic to Camberley and increase the chances of fly tipping.”
- **Need for Convenient Recycling Options:**

Annex B2

- “More recycling collection as part of the weekly collections would be helpful.”
- “We need a recycling centre that is close by.”
- “Improved recycling options from kerbside collections.”

13. Is there anything else you think we should consider or that you would like to share about this proposal?

- **Concerns About Fly Tipping:**
 - “Without it fly tipping is likely to increase as people get frustrated by the lack of local dump.”
 - “Closing the site would attract more fly tipping in the area.”
 - “Fly tipping is happening because of poor management of the recycling process.”
 - “With the loss of such facilities is it any wonder that people fly tip.”
- **Convenience and Accessibility:**
 - “If this is closed we have to drive down 20 mins to access the one in Maidenhead making it a more expensive option.”
 - “As a RBWM member who uses this site frequently, I think it would be a great shame to close it down. It is a 10-15 min drive for many RBWM residents as opposed to a 30 min plus drive to the other sites listed above.”
 - “The Bagshot centre is convenient and rarely too busy to access.”
 - “This site is the most convenient for Bagshot, Lightwater and Windlesham community and has better access for them than a long journey to Camberley.”
 - “The recycling centre at Swift Lane is a vital part of local services that are regularly used by local residents so it is important that it stays open.”
- **Environmental Concerns:**
 - “If this closes, I will have to do a 25 mile round-trip to get rid of any of my recyclables which is not green at all.”
 - “Closing tip locally is worse for the environment because more cars travel further and there will be more queues with engines running. Totally not in line with net zero.”
 - “We are supposed to be cutting down on emissions and yet we have bagshot recycle 2.4 miles away and if this closed the named one we have to use is Maidenhead (we aren’t allowed to use Bracknell) which is 8.2 miles how does that make any sense?”
 - “The purpose of recycling is to save the environment. Closing this centre would mean 100s of people regularly driving 6-10 miles away to recycle... driving unnecessarily does not help the environment.”
 - “You should consider the environmental impact of the additional fuel required to travel to these further recycling centres.”
 - “Travelling greater distances to a community recycling centre goes against the sustainability and environmental objectives of such sites.”
 - “It will also result in unnecessary additional travel and carbon emissions with the risk of additional unauthorised disposal.”

- **Staff and Service Quality:**
 - “Credit has to be given to the team that operate this site. It has always been very clean and easy to get to.”
 - “I’d just like to say how helpful and kind I have always found the people who work at the site.”
 - “The staff at the site are excellent and a couple have been there some time. They are very helpful.”
- **Cost and Resource Allocation:**
 - “Clear ups and enforcement by the relevant local authorities is expensive. If the savings gained by closing Swift Lane were exclusively ring fenced to investigate, prosecute and fine fly tippers, then there may be an argument to consider closure.”
 - “I consider this service highly important in terms of what we get in return for our high council tax costs.”
 - “We pay our council tax, and therefore expect to be able to have access to local facilities like this.”
 - “Could end up costing the community more.”
 - “More homes are being built while facilities are being closed and our council tax increases every year.”
- **Operational Issues and Suggestions:**
 - “Part of the reason Bagshot processes a smaller proportion of waste is because a) you have limited what you can take and b) it’s closed two days a week.”
 - “Change the 4 days to Thursday to Sunday and its use will increase again.”
 - “Perhaps a token fee for SL5 residents could be introduced if we are so much of a burden...a tap and go £1-2 per visit, or an annual £15 permit would not seem unreasonable.”
 - “If you decide to close the site, how will you look to use the savings? May I suggest improving cycling infrastructure (safe links between the 3 villages - properly separated from cars and pedestrians) and speed reducing measures on the A30.”
 - “Why not consider installing security cameras on the site and in swift lane.”
 - “A similar consultation took place some time ago resulting in reduced hours of opening for Bagshot. This seems to meet the needs to save costs and also those of easy access for residents.”
- **Community Impact:**
 - “This site is extremely valuable to local residents and there is NO accessible alternative for a lot of people.”
 - “It would have a disproportionate impact on residents and must be kept open.”

- “Having access to the Bagshot facility which is right next to Ascot is a pragmatic and welcome solution which would be a loss to the community should it close.”
- “The recycle centre is a valuable service provided as part of our council tax and one that contributes to the environment.”
- “This subject keeps coming up. The residents and users are constantly fighting to keep this facility open.”
- “Multiple local CRCs (rather than one larger recycling centre in Camberley) best serve the needs of our outlying village communities.”
- “The Bagshot recycling centre is used by many members of the community and would be a great loss to the local residents.”

- **Traffic and Congestion Issues:**

- “To propose to close this community recycling centre would push all the local traffic into other towns.”
- “The journey to Camberley CRC may only be 6 miles, but the number of traffic lights and traffic congestion make this an awful journey.”
- “Closing the Swift Lane site would increase the usage of the already very busy Camberley site causing queuing and traffic problems.”
- “Mileage to alternatives is one way of looking at it however it doesn’t represent the time it would take to get to these locations on a weekend, particularly the closest - Camberley. A30 is already a nightmare with traffic.”
- “There is too much traffic congestion on the A30. Why does the council want to add to that congestion with all those extra car miles to Camberley and all those extra emissions?”
- “Access to Camberley Wilton Rd needs to improve as there is already congestion.”

- **Opposition to Closure:**

- “I strongly disagree with the proposed closure of the site.”
- “In summary I strongly oppose the closure of the Bagshot site.”
- It is unacceptable to close Swift Lane recycling centre.”

- **Council Decisions and Communication:**

- “Please advise why this proposal is not being sent out to all parties affected by this decision.”
- “It’s madness and I will not vote again for any of the current council if this facility is closed.”
- “The Council needs to start listening to the community it’s supposed to be serving.”
- “Seems like the sooner we change councillors or those who say they look after local residents the better.”

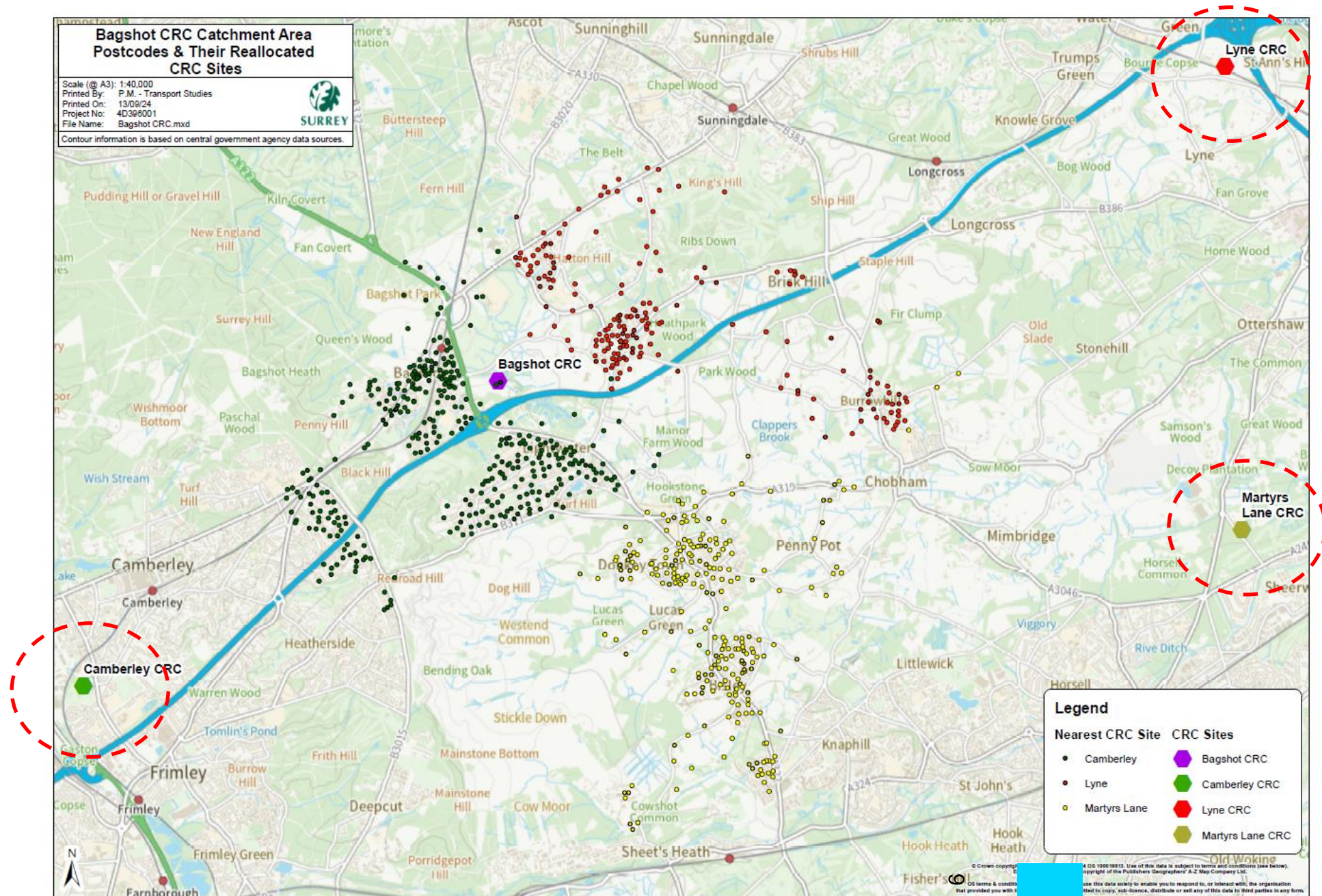
Annex C – SUEZ Nuisance Reports

Location	Date	Description
Swift lane CA	02/01/2024	Fly tip thrown over the fence
Swift lane CA	09/01/2024	Fly tip of inert thrown over the fence
Swift lane CA	27/01/2024	Fly tip at the front gate
Swift lane CA	30/01/2024	Fly tip at the front gate
Swift lane CA	10/02/2024	Break in on site, angle grinder taken to the office shutter, battery container keys stolen, oil thrown around site.
Swift lane CA	19/02/2024	Flytip at the front gate
Swift lane CA	21/02/2024	Site break in. Printer cartridges, Oil containers, and Flurescent tubes smashed over the site
Swift lane CA	04/03/2024	Wooden board that was on the fence was pushed apart
Swift lane CA	05/03/2024	Fly tip thrown over the fence. Wood and hardcore
Swift lane CA	17/03/2024	Small flytip thrown over the fence
Swift lane CA	19/03/2024	Fly tip thrown over the fence and has some asbestos in between the rubbish
Swift lane CA	20/03/2024	Flytip in front of gates
Swift lane CA	20/03/2024	Fly tip at thr front gate
Swift lane CA	23/03/2024	Kids from neighbouring homes kept coming in and running around
Swift lane CA	24/03/2024	Small fly tip at the front gate
Swift lane CA	02/04/2024	Small flytipp at the front gate
Swift lane CA	16/04/2024	Small Flytip at the fromt gate
Swift lane CA	20/04/2024	Flytip at the fromt gate
Swift lane CA	21/04/2024	2 kids Kids from neighbouring homes came in on their bike
Swift lane CA	24/04/2024	Kids from neighbouring homes throw a coke can over and hit Memeber of staff on the arm
Swift lane CA	25/04/2024	Waste blocking the main gate to swift lane that is too heavy to move out of the way
Swift lane CA	04/05/2024	Flytip shed at the front gate and couple of bags with Birmingham city council on them
Swift lane CA	05/05/2024	Small spill of paint on the floor
Swift lane CA	08/05/2024	Large flytip outside the gate and inside of the gate including paint Painted on the gate and thrown on the floor causing a delay in the containers getting exchanged as transport are unable to enter the site
Swift lane CA	11/05/2024	Break in during the sites 3 day closure between 16:15 Tuesday the 7th May and 07:20 Saturday the 11th Fencing cut to gain entry to the site waste pulled out of containers and thrown all over the yard. Broken glass and over the floor breaking padlocks to get open containers, back of container opened
Swift lane CA	25/05/2024	Fly tip outside the main gate
Swift lane CA	26/05/2024	Break in while the site was closed Saturday Night spotted by staff on Sunday Morning fencing damaged to gain access to site no signs of anything being taken reported via the Surrey Police online reporting DP-20418-24-4545-03
Swift lane CA	26/05/2024	Small fly tip out side the gate
Swift lane CA	27/05/2024	Some flytipped items trown over the fence
Swift lane CA	31/05/2024	Large fly tip left out side the sites gate
Swift lane CA	08/06/2024	Small flytip outside the gate noticed when the staff arrived
Swift lane CA	10/06/2024	small flytip seen outside the gate upon arrival to the site
Swift lane CA	15/06/2024	Small flytip outside the gate 3 black bags and a suitcase

Annex C – SUEZ Nuisance Reports

Location	Date	Description
Swift lane CA	17/06/2024	Break in & Flytip from the night before climbed over the fence to gain entry they have been going through bins and throwing items around the latch to the gas cage has been broken . Police have been informed via the online reporting
Swift lane CA	17/06/2024	Someone firing a bb gun towards members of the public. Reported to the police
Swift lane CA	22/06/2024	Break in & Flytip from the night before climbed over the fence and damaged it to gain entry they have been going through bins and throwing items around all the container signs thrown into the yard wood and hardcore items thrown over the fence along with loads of green waste Police have been informed
Swift lane CA	23/06/2024	Small fly outside the gate
Swift lane CA	25/06/2024	Small flytip two black bags and a tv outside the gate
Swift lane CA	13/07/2024	Staff arrived at Site after weekly site closure to find that the site has been broken into and vandalised, Paint and oter items spread around the yard containers broken into general damage to items on site
Swift lane CA	20/07/2024	small flytip outside the gate
Swift lane CA	21/07/2024	Small flytip
Swift lane CA	23/07/2024	Small flytip outside the gate a few black bags and some green waste
Swift lane CA	27/07/2024	Flytipped fridge freezer outside the main gate
Swift lane CA	03/08/2024	Vandals broke into yard during shut down period and caused damage to site and Emptied materials around the site from site containers also fly tip over fence into site and fly tip outside - this caused the site to remain closed untill 9:30 to make safe for all users and staff
Swift lane CA	08/08/2024	Break in the night before the intruders throwing waste all over the opened the back of some of the container damaged the fence behind the office to gain entry. Reported to the police via the online reporting system
Swift lane CA	17/08/2024	Fly tip out side of Gates Staff cleaned up and opened site
Swift lane CA	24/08/2024	Fly tip outside the gate while the site was closed
Swift lane CA	25/08/2024	Fly tip while the site was closed a cut up tree had been thrown over the gate blocking the gate

Annex D



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Closure of Bagshot Community Recycling Centre

Did you use the EIA Screening Tool? (Delete as applicable)

Yes (please attach upon submission)

1. Explaining the matter being assessed

This is a:

- Change to a service or function

Summarise the strategy, policy, service(s), or function(s) being assessed. Describe current status followed by any changes that stakeholders would experience.

The council provides a network of 15 CRCs across the county, which provide facilities for Surrey residents to recycle waste from their homes. This EIA considers the impact of closing Bagshot CRC and extending opening of nearby Camberly CRC by one day per week to seven days per week.

Bagshot CRC currently sees approximately 50K visits per year and receives approximately 1700 tonnes of waste per year. This equates to approximately 2% of the county's annual CRC tonnage. The closest alternative sites at Camberley, Lyne and Woking receive approximately 157k, 121k and 243k visits per year respectively.

Waste bins at Bagshot CRC are only accessible with the use of steps making access more challenging for some users.

If the closure proceeds, some users would have to travel for up to twenty minutes to the closest of three nearby alternative sites located in Camberley, Lyne and Woking. However, all of these alternative sites are more accessible, split-level sites where waste bins are situated at a lower level than the publicly accessible areas, enabling users to drop waste down into bins without the need to climb steps.

It is proposed that the closest alternative CRC to Bagshot, located in Camberley, will be opened for an additional day per week to mitigate the impact of the closure.

How does your service proposal support the outcomes in [the Community Vision for Surrey 2030](#)?

This work relates to the following 'Place' ambition:

Residents live in clean, safe and green communities, where people and organisations embrace their environmental responsibilities.

Are there any specific geographies in Surrey where this will make an impact?

Equality Impact Assessment

- Surrey Heath
- County division - Bagshot, Windlesham and Chobham

Assessment team.

- Alan Horton
 - SCC Resources and Circular Economy Team
 - Author
-
- Richard Parkinson
 - SCC Resources and Circular Economy Group Manager
 - Reviewer and contributor
-
- Steven Foster
 - SCC Interim Director for Waste
 - Sponsor and approver

2. Service Users / Residents

Who may be affected by this activity?

There are 9 protected characteristics (Equality Act 2010) 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

Though not included in the Equality Act 2010, Surrey County Council recognises that there are other vulnerable groups which significantly contribute to inequality across the county and therefore they should also be considered within EIAs. If relevant, you will need to include information on the following vulnerable groups (Please **refer to the EIA guidance** if you are unclear as to what this is).

- Members/Ex members of armed forces and relevant family members (in line with the Armed Forces Act 2021 and [Statutory Guidance on the Armed Forces Covenant Duty](#))
- Adult and young carers*
- Those experiencing digital exclusion*
- Those experiencing domestic abuse*
- Those with education/training (literacy) needs
- Those experiencing homelessness*
- Looked after children/Care leavers*
- Those living in rural/urban areas
- Those experiencing socioeconomic disadvantage*
- Out of work young people)*
- Adults with learning disabilities and/or autism*
- People with drug or alcohol use issues*
- People on probation
- People in prison
- Migrants, refugees, asylum seekers
- Sex workers
- Children with Special educational needs and disabilities*
- Adults with long term health conditions, disabilities (including SMI) and/or sensory impairment(s)*
- Older People in care homes*
- Gypsy, Roma and Traveller communities*
- Other (describe below)

(*as identified in the Surrey COVID Community Impact Assessment and the Surrey Health and Well-being Strategy)

Equality Impact Assessment

All protected characteristics and vulnerable groups

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

The closure of the site would not impact or disadvantage any group more than any other and affects all current users of the site.

Swift lane isn't accessible on foot, so closure won't impact pedestrian visitors. Hypothetically Camberley can be accessed by pedestrians but its location renders this point moot.

Swift Lane is the closest CRC to 12,428 households.

63.47% (7894) of these households will see no increase in drive time when accessing the nearest alternative (Lyne, Woking or Camberley).

Of the remaining 4544 households, none will have a drive time of greater than 20 minutes or 7.8 miles to the closest alternative site.

9 A four-week consultation was carried out to give residents an opportunity to participate in the decision-making process on the closure. The consultation ran from 16th September 2024 until 11th October 2024. Seven % of respondents were in favour of the proposal. None of the responses highlighted any impacts on groups with protected characteristics or vulnerabilities.

SUEZ incident logs have recorded 48 nuisance incidents (fly-tipping, break ins, vandalism, anti-social behaviour) between 2nd January 2024 and 25th August. No other SCC CRC suffers such high levels of nuisance-based disruption. This disruption impacts on site staff and users negatively, the site often having to close to allow remedial action.

SUEZ have recorded 801 instances of fly tipping across all Surrey CRC sites between January 2019 and August 2024. Of these, 531 (66%) were at Bagshot CRC. Of the other 14 sites, Lyne experienced 89 fly tipping incidents (11%) in the period. Fly tipping incidents at all of the other 12 sites combined make up the remaining 23%.

Despite the high levels of disruption, a review of complaints received from users of the site by SUEZ since January 2023 shows that 23 complaints have been recorded across the CRC estate, none of which relate to Bagshot CRC. SUEZ believe that this reflects the empathy felt by users of the site for site staff, recognising the difficulties the site presents.

The site has to close for container exchange, leading to inconvenience & a build-up of queues. There is no means of compacting the containers which means that they will go out light – creating more of a carbon impact per tonne in terms of haulage. These issues do not occur at the alternative sites.

SUEZ have confirmed that no jobs would be lost if the site was closed.

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

All of the alternative sites are more accessible, split-level sites and don't require the use of steps to access waste bins.

Equality Impact Assessment

The alternative site at Woking includes a Revive Reuse shop providing opportunities for an enhanced visitor experience.

Users of the Bagshot site must cross vehicle routes through the site to access waste bins which presents a hazard. All of the proposed alternative sites are designed such that vehicles are unloaded next to waste bins, negating the need for users to come into potential conflict with vehicles.

Use of the proposed alternative sites would have a relatively small impact on journey times and distances and only a relatively small cohort of users would see increased journey times to alternative sites.

If Bagshot CRC is closed, the alternative site in Camberley will be opened for an additional day each week meaning that this site is available seven days per week. Bagshot CRC is open only four days per week (Saturday to Tuesday inclusive).

SUEZ will redeploy staff from Bagshot CRC to resource the additional opening hours at Camberley CRC and to provide additional assistance for site users at all three alternative sites.

The Resources and Circular Economy Team will work with Surrey Heath Borough Council (SHBC) to monitor fly tipping in Bagshot following closure of the CRC. However it should be noted that SHBC and/or the Environment would be responsible for clearance and enforcement action (dependant on scale) where waste is fly tipped on the highway or public land.

SUEZ will monitor compliments and complaints from site users to identify whether any service improvements could be introduced to further mitigate the impact of the closure.

Should the closure of the site proceed, residents will be informed via a press release, targeted social media posts and signage on site notifying residents of the closure and associated timeframes.

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?

The Swift Lane CRC site in Bagshot is too small to allow the construction of the necessary ramps to convert it to a split-level facility whilst providing sufficient space for operations such as bin movements.

3. Staff

All protected characteristics and vulnerable groups

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

The closure of the site would not impact or disadvantage any group more than any other and affects all current site staff. The staff concerned are employed by SUEZ and SCC do not hold any data on them.

Site staff will be retained by SUEZ and relocated to work at other sites close by.

Waste bins at the alternative, split-level sites are more easily accessed by all.

9 Describe here suggested mitigations to inform the actions needed to reduce inequalities.

Site staff will be retained by SUEZ and relocated to work at other sites close by.

Site staff site must cross vehicle routes through the site to access waste bins which presents a hazard. All of the proposed alternative sites are designed such that vehicles are unloaded next to waste bins, negating the need for users and staff to come into potential conflict with vehicles.

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?

The Swift Lane CRC site in Bagshot is too small to allow the construction of the necessary ramps to convert it to a split-level facility whilst providing sufficient space for operations such as bin movements.

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:

The Resources and Circular Economy Team are recommending Outcome One to allow the closure of Swift Lane CRC in Bagshot and extend the opening of Camberly CRC seven days per week.

Explanation:

Following a recent review of the operation, the Resources and Circular Economy team are recommending the closure of Bagshot Community Recycling Centre (CRC) due to:

- **Condition** - the site is difficult to access, unmodernised and too small to be upgraded to a modern split-level site, so it cannot be made fit for future, in line with the Council's mid-term Waste Strategy.
- **Low usage** – it is one of the county's smallest sites for public recycling, handling just 2% (c.1,700 tonnes) of the county's CRC waste each year.
- **Safety concerns** - the site has suffered from repeated incidences of antisocial behaviour including, overnight vandalism and fly tipping. Users must also cross vehicle circulation areas to access the waste bins.

Equality Impact Assessment

The closure of the site would not impact or disadvantage any group more than any other and affects all current users of the site.

Alternative sites located close by are more accessible and analysis has shown that the longest journey from a household in the Bagshot CRC area to an alternative site will not exceed twenty minutes. Most current users will not see significantly increased journey times to alternative sites.

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	Update/Notes	Open/ Closed
1	On Closure	SUEZ will monitor compliments and complaints from site users to identify whether any service improvements could be introduced to further mitigate the impact of the closure	SUEZ	12 Months from closure		
2	Following Cabinet decision	SCC will inform residents via a press release, targeted social media posts and signage on site notifying residents of the closure and associated timeframes.	SCC Comms	1 week from Cabinet decision to close		
3						

6a. Version control

Version Number	Purpose/Change	Author	Date
0.0	Draft	Alan Horton	08/10/2024
1.0	Final	Alan Horton	18/10/2024

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.

Equality Impact Assessment

6b. Approval

Secure approval from the appropriate level of management based on nature of issue and scale of change being assessed.

The level of EIA sign off will depend on who the change affects. Generally speaking, for strictly internal changes, Head of Service/ Exec Director sign off should suffice. For changes affecting residents, the Cabinet Member is required to approve completed EIAs.

Approved by	Date approved
Head of Service	08/10/2024
Executive Director	
Cabinet Member	
Directorate Equality Group/ EDI Group (If Applicable) (arrangements will differ depending on your Directorate. Please enquire with your Head of Service or the CSP Team if unsure)	

Publish:

It is recommended that all EIAs are published on Surrey County Council's website.

Please send approved EIAs to: equalityimpactassessments@surreycc.gov.uk

EIA author:

6c. EIA Team

Name	Job Title	Organisation	Team Role
Alan Horton	RACE Programme Manager	SCC Resources and Circular Economy team	Author
Richard Parkinson	Resources and Circular Economy Group Manager	SCC Resources and Circular Economy team	Reviewer
Steven Foster	Interim Director of Waste	SCC Resources and Circular Economy team	Approver

Equality Impact Assessment

If you would like this information in large print, Braille, on CD or in another language please contact us on:

Tel: 03456 009 009

Textphone (via Text Relay): 18001 03456 009 009

SMS: 07860 053 465

Email: contactcentre@surreycc.gov.uk

SURREY COUNTY COUNCIL**CABINET****DATE: 26 NOVEMBER 2024****REPORT OF CABINET MEMBER: CLARE CURRAN, CABINET MEMBER FOR CHILDREN, FAMILIES AND LIFELONG LEARNING****LEAD OFFICER: RACHAEL WARDELL, EXECUTIVE DIRECTOR FOR CHILDREN, FAMILIES AND LIFELONG LEARNING****SUBJECT: EQUITY IN EDUCATION – NO LEARNER LEFT BEHIND – SURREY'S LIFETIME OF LEARNING STRATEGY****ORGANISATION STRATEGY PRIORITY AREA: NO ONE LEFT BEHIND / TACKLING HEALTH INEQUALITY / EMPOWERED AND THRIVING COMMUNITIES****Purpose of the Report:**

Surrey has a diverse and vibrant education landscape and has educational outcomes at each key stage above the national average.

There are however some cohorts of children and young people who have significantly poorer outcomes than their peers in other parts of the country. A collaborative approach to establishing a common ambition for all learners in Surrey is essential to achieving equity and excellence for all learners.

Effective early years education is known to impact on how well children perform at school and research has shown that it also impacts upon their earning potential as adults.

Adults need to be able to access high quality learning opportunities to develop new skills or to secure new qualifications. In some areas of Surrey, adults are less able to secure economic well-being because of skills and qualification gaps and are therefore at greater risk of poor health outcomes. We therefore want to support the ambitions seen in the Surrey Skills Plan 2022. We also need to respond to the emerging skills gaps.

For these reasons, this strategy will embrace the opportunities for a Lifetime of Learning.

Through realisation of the strategy, the learning offer in Surrey will allow residents of all ages rich and diverse opportunities to acquire the knowledge and skills they need at any time in their lives. Whether that is part of compulsory schooling, careers development, learning a new skill or even brushing up on maths and English to help children at home, we want to have a learning offer that meets the individual needs of learners at all stages of life.

Recommendations:

It is recommended that Cabinet:

1. Approves the Surrey Lifetime of Learning Strategy and its publication.
2. Endorses the ambition of the Surrey Education Partnership that no learner is left behind, and agrees the partnership ambition, principles and priorities for children, young people and adults as outlined in the strategy for 2024-30.
3. Agrees to contribute as a key partner to the ambition, principles and priorities for children, young people and adults as outlined in the strategy for 2024-30.

Reason for Recommendations:

Whilst most of the children, young people and adults in Surrey achieve, thrive, belong and live well, this is not the case for everyone.

In Surrey, children from less-well off homes start school already educationally behind their peers, and this gap persists throughout school and into further and higher education. In many instances outcomes are weaker than similarly disadvantaged learners in other parts of the country.

In some areas of Surrey, adults are less able to secure economic well-being because of skills and qualification gaps.

We are aware that attendance is a significant factor in achieving the best outcomes, and that in Surrey exclusion from school and poor attendance is too high.

Studies have also shown direct links between education and factors such as health and life expectancy rates, with academic achievement playing a potentially significant role in reducing health inequalities by shaping life opportunities.

This strategy will ensure that we take the necessary actions across the partnership, to close the gaps in terms of educational outcomes, exclusions and attendance. It will also ensure that Surrey adults can access learning opportunities, in high quality provision, that develop new skills or secure new qualifications to help them succeed at any time they need to.

Executive Summary:

Business Case:

1. Attached is 'Educational Equity - No Learner Left Behind: Surrey's Lifetime of Learning Strategy' and the data pack which provides additional detail regarding the attainment and achievement we see in Surrey.
2. Surrey's Lifetime of Learning strategy outlines the vision for providing high-quality education to all children, young people, and adults, regardless of their background, challenges, or needs so they belong and thrive.

3. The strategy is in line with the Council's broader vision for 2030, that 'No one is left behind'. It aims to ensure that everyone in the community can thrive and contribute to society at all stages in their life.

Key Principles:

4. **Inclusive Education for all:** Ensure every individual benefits from education, overcoming inequalities, and removing barriers to participation.
5. **Respect and Fair Treatment to support positive and improved outcomes for all:** Promote an environment where all individuals, regardless of background or culture, feel respected and valued.
6. **Collaborative Partnerships:** Work with various stakeholders to improve educational outcomes and address the needs of a diverse population.

Co-production Approach:

7. The strategy emphasises a collaborative approach, involving leaders from all educational sectors, to take shared responsibility for improving educational outcomes. This includes a focus on transparency, shared accountability, and ensuring no learning setting is isolated.

Ambitions for the 4 lifetimes of learning:

8. **Foundations for Life:** Provide high-quality early education that supports children's physical, cognitive, and emotional development.
9. **Thriving in Learning:** Ensure schools offer inclusive, creative curricula that help all students, especially those from disadvantaged backgrounds, succeed.
10. **Flourishing Young Adults:** Support young people in becoming confident lifelong learners, contributing positively to society and the economy.
11. **Economic Growth and Personal Well-being:** Provide adults with access to education that supports their ambitions and improves social inclusion and well-being.

Priorities (2024-2026):

12. **Our key priority is to improve educational outcomes for under-served groups.** We will do this through improvements to:
 - **Communication and Literacy:** Enhance language and literacy skills across all age groups, focusing on vulnerable individuals who struggle with these key skills.
 - **Attendance and Engagement:** Address issues leading to low attendance and disengagement, ensuring that all children and young people are fully involved in their education.

- **Emotional Well-being:** Support the emotional and mental health of learners by embedding well-being into the ethos and practices of educational settings.
- **Teacher and Leader Development:** Recruit, retain, and develop high-quality learning providers, providing ongoing professional development to ensure the best educational outcomes.

13. Creating better educational equity is crucial for several key reasons, all of which have significant implications for individuals, communities, and society as a whole:

14. Promotes Social Justice

- **Fairness:** Educational equity ensures that all learners, regardless of their background, have access to the resources, opportunities, and support they need to succeed. This addresses historical and systemic inequalities that have disadvantaged certain groups, particularly those based on race, ethnicity, socioeconomic status, and disability.
- **Reduces Inequality:** By levelling the playing field, educational equity helps to reduce the disparities in outcomes that exist between different social groups. This is a step towards a more just society where everyone has a fair chance to succeed.

15. Improves Economic Outcomes

- **Workforce Readiness:** A more equitable education system ensures that all students are prepared for the workforce, leading to a more skilled and diverse labour pool. This can enhance economic productivity and innovation.
- **Economic Mobility:** Education is a key driver of economic mobility. Providing equitable educational opportunities helps individuals from disadvantaged backgrounds to improve their economic standing, breaking the cycle of poverty.

16. Enhances Social Cohesion

- **Inclusive Society:** When educational systems are equitable, they contribute to a more inclusive society where people from different backgrounds have mutual respect and understanding. This fosters social harmony and reduces the potential for conflict.
- **Civic Engagement:** Equitable education promotes active and informed citizenship. When everyone has access to quality education, they are better equipped to participate in democratic processes and contribute to the community.

17. Maximises Human Potential

- **Talent Utilisation:** Educational equity ensures that society can tap into the full range of talents and abilities of its population. When everyone can reach their potential, society benefits from a more diverse and capable workforce, leading to greater innovation and progress.
- **Personal Fulfilment:** Education is not just about economic outcomes; it also plays a crucial role in personal development and fulfilment. Equitable education enables individuals to pursue their interests and aspirations, leading to more fulfilling lives.

18. Long-Term Societal Benefits

- **Public Health:** Higher levels of education are associated with better health outcomes. By promoting educational equity, society can reduce health disparities and improve overall public health.
- **Reduction in Crime:** Studies show that educational attainment is inversely related to crime rates. By providing equitable educational opportunities, society can reduce crime and its associated social and economic costs.

19. Global Competitiveness

- **Innovation and Growth:** In an increasingly globalized world, countries that ensure equitable education for all are more likely to foster innovation and maintain competitiveness. Education fuels the skills and knowledge necessary for economic growth in the global market.
- **Sustainable Development:** Educational equity is essential for achieving sustainable development goals, as it contributes to poverty reduction, gender equality, and the empowerment of marginalized communities.

Implementation and Monitoring:

20. Surrey's Education Partnership (SEP) has been established to support the strategy's development and implementation, focusing on collaborative working across sectors.
21. The Strategy is aimed at ensuring that all learners, regardless of their circumstances, can access high-quality education and support throughout their lives. The strategy emphasises collaboration, inclusivity, and continuous improvement to close existing gaps in learning and well-being.
22. The list of key members of the Surrey Education Partnership include:
 - Lead Member for Children, Families and Education
 - Schools Alliance for Excellence
 - Health and Wellbeing Board representative

- Surrey County Council officers (Director of Education and Lifelong Learning, Principal of Surrey Adult Learning, Assistant Director for Educational Access, Quality and Improvement, Service Manager for School Effectiveness, Head of Early Years)
- School Phase Council Leads
- Diocese representative (schools)
- Academy Trust representatives Further Education Representative
- ALPs Partnership (representing apprenticeships in south)
- 6th form college representative
- Head Teacher of the Virtual School
- Health and Wellbeing Board representative
- Department for Education
- Independent Chair

23. Further representatives are being sought from employment, voluntary, non-maintained and higher education sectors.

Consultation:

24. This Surrey Lifetime of Learning Strategy has been developed in consultation with key stakeholders: school phase councils; further education and skills providers; the local area Additional Needs and Disabilities (SEND (Special Educational Needs and Disabilities)) partnership board; Surrey's Health and Wellbeing Board; Schools Alliance for Excellence and wider Council services.

25. We are now able to learn more about what our children and young people, parents and carers and community groups want from this strategy, and this will be an area we will focus on over the coming months.

26. The original rationale for the Lifetime of Learning strategy was described to Cabinet in January 2023. The report can be found here: [Cabinet Report 03.01.23 Final.pdf \(surreycc.gov.uk\)](#)

27. The Health and Wellbeing Board was consulted on 17 July 2024. The draft ambitions, priorities and rationale behind the strategy were shared and endorsed.

Risk Management and Implications:

28. In a diverse school education landscape, the local authority retains statutory duties which include promoting the learning potential for all children in Surrey especially those who are vulnerable. We are required to provide education until the last Friday in June for children who will be 16 by the end of the summer holiday of that year.

29. Young people aged 16-18 must do one of the following until they are 18 years old:
- stay in full-time education, for example at a college
 - start an apprenticeship
 - spend 20 hours or more a week working or volunteering, while in part-time education or training
30. There is no statutory requirement to provide education after the age of 18 years but the Council recognises the value of ongoing adult learning in maintaining and developing skills for work and life.
31. An education strategy will ensure that all settings are committed to inclusion and to working in a collaborative way to benefit every child, young person, and adult.
32. The Lifetime of Learning Strategy focusses on continuing to ensure we champion educational excellence for all learners who are encouraged to achieve outstanding outcomes. This means creating the necessary conditions and environment for success and celebrating the achievement of children and young people in education and that of their learning setting. We will provide the opportunities for adults to address skills and qualification gaps allowing them to maximise their earning potential and live healthy lives. Often, we find that the most advantaged learners in Surrey are the highest attaining and the most disadvantaged the lowest. There is a close link between education and disadvantage. In areas where there are poor educational outcomes, there is often a corresponding level of poor health, poor housing, and high levels of unemployment.

Breakdown of Key Stage 2 (end of primary phase) and Key Stage 4 (end of secondary phase) results by school type:

Key Stage 2 2023 - % of pupils achieving at least the expected level in Reading, Writing and Maths (RWM) by school type

KS2 2023	Academy %	Maintained %	Surrey All %
RWM All Group	65	64.7	64.9
Disadvantaged	39.2	36.9	38.2
Non-disadvantaged	70.9	70.6	70.8
Disadvantage Gap	31.7	33.7	32.6

source Nexus 2023

33. Outcomes for pupils who are not from a disadvantaged background are very similar between academies and maintained schools at the end of Key Stage 2. However, outcomes for pupils who are from a disadvantaged background are better for those attending academies.

Key Stage 4 2023 – Attainment 8 and Progress 8 scores by school type

KS4 2023	Academy	Maintained	Surrey All
ATT8 %	51.1	49.4	50.8
Disadvantaged %	34.2	29.8	33.3
Non-disadvantaged %	54	52.6	53.7
Disadvantage Gap	19.8	22.8	20.4
Progress 8 score	0.19	0.16	0.17
Disadvantaged	-0.69	-0.9	-0.73
Non-disadvantaged	0.33	0.34	0.03
Disadvantage Gap	1.02	0.56	-0.14
<i>source Nexus 2023</i>			

34. This pattern is repeated at the end of Key Stage 4. Please note that the maximum possible Attainment 8 score achievable is 90 (based on achieving a Grade 9 in 10 subjects). A Progress 8 score of 0 indicates that on average pupils did as well at KS4 as other pupils across England who got similar results at the end of KS2. A negative score indicates lower than average progress, whereas a positive score reflects better than average progress.

Breakdown of Key Stage 2 and Key Stage 4 results by district/ borough:

Key Stage 2 2023 - % of pupils achieving at least the expected level in Reading, Writing and Maths (RWM) by locality

KS2 2023	Elmbridge %	Epsom & Ewell %	Guildford %	Mole Valley %	Reigate & Banstead %	Runnymede %	Spelthorne %	Surrey Heath %	Tandridge %	Waverley %	Woking %
RWM All Group	74.2	59.6	63.2	63.8	64.4	60.3	61.4	62.2	62.6	70.1	64.8
Disadvantaged	44.5	28.6	33	33.8	43.8	33.3	41.1	37.3	36.2	36.2	42.6
Non-disadvantaged	79.6	65	70.1	70	69	69.2	67.8	67.7	69.7	74.9	69.9
Disadvantage Gap	35.1	36.4	37.1	36.2	25.2	35.9	26.7	30.4	33.5	38.7	27.3
<i>source Nexus 2023</i>											

35. Outcomes at the end of Key Stage 2 vary considerably between localities in Surrey. The proportion of children from a disadvantaged background who achieved at least the expected level in RWM at the end of Key Stage 2 ranges from 28.6% in Epsom & Ewell to 44.5% in Elmbridge.

36. For those from a non-disadvantaged background it ranges from 65% in Epsom & Ewell to 79.6% in Elmbridge.

37. The smallest disadvantaged gap (in favour of pupils from a non-disadvantaged background) is seen in Reigate & Banstead (25.2 percentage points), with the largest in Waverley (38.7 percentage points). In all localities, pupils from a non-disadvantaged background achieve better outcomes than their peers.

Key Stage 4 2023 – Attainment 8 and Progress 8 scores by locality

KS4 2023	Elmbridge	Epsom & Ewell	Guildford	Mole Valley	Reigate & Banstead	Runnymede	Spelthorne	Surrey Heath	Tandridge	Waverley	Woking
ATT8 %	53.7	52.3	54.1	52.3	47.5	52.8	47.8	50.8	42.7	52.4	49.9
Disadvantaged %	35.8	37.5	33.3	31.4	30.8	37.6	34.7	29.2	31.4	33.2	32.3
Non-disadvantaged %	56.4	54.2	57.3	55.8	51	55.1	50.4	54.7	45.3	55	53
Disadvantage Gap	20.6	16.7	24	24.4	20.2	17.5	15.7	25.5	13.9	21.8	20.7
Progress 8 score	0.31	0.29	0.44	0.31	-0.02	0.24	0	0.19	-0.3	0.22	0.17
Disadvantaged	-0.73	-0.35	-0.57	-0.99	-0.99	-0.4	-0.69	-0.82	-0.96	-0.74	-0.77
Non-disadvantaged	0.47	0.37	0.59	0.53	0.19	0.34	0.14	0.37	-0.14	0.35	0.34
Disadvantage Gap	1.2	0.72	1.16	1.52	1.18	0.74	0.83	1.19	0.82	1.09	1.11

source Nexus 2023

38. Once again, the picture is very similar at the end of Key Stage 4 in terms of variability between localities. However, the highest Attainment 8 outcomes for disadvantaged pupils at this stage are seen in Runnymede (34.7) and the lowest in Surrey Heath (29.2).

39. The highest Progress 8 score for these pupils is in Epsom & Ewell (-0.35, so still representing lower progress than national average) and the lowest jointly in Mole Valley and Reigate & Banstead (both -0.99). In terms of both the attainment and progress measures, once again pupils from a non-disadvantaged background achieve better outcomes than their peers in all localities.

Financial and Value for Money Implications:

40. There is not an additional cost of the proposed action as the proposal is within the agreed revenue budget programme. Schools Forum has agreed the funding of the Independent Chair of the Surrey Education Partnership from the Dedicated Schools Grant (DSG). The resource for the actions identified by the SEP Board is also from existing budgets.

41. The direct Costs of Education are provided through ringfenced grants such as the Dedicated Schools Grant (DSG) for Early years; to Further Education to the age of 19 or 25 for those with Additional Needs. Further grants are received from the DfE to support both further Education and Adult Education. There are therefore no immediate General Fund implications to this report.

Section 151 Officer Commentary:

42. The Council continues to operate in a very challenging financial environment. Local authorities across the country are experiencing significant budgetary pressures. Surrey County Council has made significant progress in recent years to improve the Council's financial resilience and whilst this has built a stronger financial base from which to deliver our services, the cost of service delivery, increasing demand, financial uncertainty and government policy changes mean we continue to face challenges to our financial position. This requires an increased focus on financial management to protect service

delivery, a continuation of the need to deliver financial efficiencies and reduce spending in order to achieve a balanced budget position each year.

43. In addition to these immediate challenges, the medium-term financial outlook beyond 2024/25 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 the stable provision of services in the medium term.

44. The Section 151 Officer agrees the recommendations of this report.

Legal Implications – Monitoring Officer:

45. The local authority has statutory duties to exercise its functions to promote and support the wellbeing and learning of all children in accordance with a range of statutory duties including those within the Education Act 1996, Children Act 2004, Childcare Act 2006. The education strategy will contribute towards the local authority meetings its statutory duties for children and young people through the commissioning and delivery of education and training provision for young people aged 16 and 17 years. There is not a statutory duty to provide education to adults over the age of 18 years unless they have an Education, Health and Care Plan. In line with the Surrey Skills plan the Council has identified the benefits to the residents of Surrey in maintaining learning opportunities into adulthood.

46. The public sector equality duty (Section 149 of the Equality Act 2010) applies to the decision to be made by the Cabinet Member in this report. There is a requirement when deciding upon the recommendations 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. These matters are dealt with in the equalities paragraphs of the report and in the attached equalities impact assessment (EIA) found in Annex A.

Equalities and Diversity:

47. There have been no negative equalities implications arising from the proposals within 'Equity in Education – Surrey's lifetime of Learning Strategy.' [An Equalities Impact Assessment is attached as Annex A].

48. The provisions outlined within the ambitions and priority areas of the strategy will support the Council's commitment to equality and diversity.

49. The EIA screening tool indicated that a full EIA is required. This has been drafted and is due to be reviewed by the DEG in September 2024. The EIA has been included within these papers.

50. Outcomes for some learners in Surrey are significantly below those of their peers. The ambition of the lifetime of learning strategy is to mobilise a collaborative effort to close the gap in outcomes for our most disadvantaged learners.

51. The Surrey Skills Strategy outlines the pockets of deprivation and stark gap in workplace versus residents' earnings which requires intervention to ensure no one is left behind and all residents share in Surrey's success.

Other Implications:

52. 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	See below
Safeguarding responsibilities for vulnerable children and adults	No significant implications arising from this report
Environmental sustainability	No significant implications arising from this report
Compliance against net-zero emissions target and future climate compatibility/resilience	No significant implications arising from this report
Public Health	The Strategy is closely aligned to several priorities within the Health and Wellbeing strategy and has links to the JSNA (Joint Strategic Needs Assessment). See below.

CORPORATE PARENTING/LOOKED AFTER CHILDREN IMPLICATIONS

53. This is a key document to ensuring that the highest priority given to the attainment of children in the care of the local authority.

PUBLIC HEALTH

54. Links to Surrey Health and Wellbeing Strategy:

- Priority 2 Outcome: Environments and communities in which people live, work, and learn build good mental health

- Priority 3 Outcomes: Children, young people, and adults are empowered in their communities; People access training and employment opportunities within a sustainable economy.

55. Links to the Joint Strategic Needs Assessment

- Wider Determinants of Health: Chapter: Education, Training and Lifelong Learning
- Economy
- Population, Groups and Communities - Chapters (various)

56. Emotional Health and Wellbeing

- Chapter: Children and Young People's Emotional Wellbeing and Mental Health Strategy
- Chapter: Emotional and Mental Wellbeing in Surrey Adults

57. The Lifetime of Learning Strategy is also closely aligned to the Surrey Skills Plan as both an input into the programme's design and as a mechanism for change. See [Surrey-Skills-Plan.pdf (businesssurrey.co.uk)]

58. The Surrey Skills Plan is closely linked with the No One Left Behind programme, Surrey's No One Left Behind programme takes collective and collaborative action to identify and tackle the challenges faced by those furthest from the labour market in Surrey.

59. It focuses on those aged 16+ who are at severe risk of being economically excluded without additional support to access skills development or employment.

What Happens Next

60. During the autumn 2024 term we will communicate the strategy to residents and stakeholders. We will engage with residents further to seek their views on the strategy to help inform next steps.

61. Surrey's Education Partnership (SEP) has been established to support the strategy's development and implementation, focusing on collaborative working across sectors. The Partnership will be steered by a Board that will oversee its work, provide strategic direction, and approve and monitor delivery of annual priorities.

62. The SEP will continue to recruit Board members which represent the Surrey community. The SEP will work with stakeholders to develop an action plan which will support us to meet the priorities we have outlined.

63. The SEP will monitor the strategy's impact, share, and celebrate best practice, and ensure that excellence and equity remain central to meeting the vision and priorities.

64. The Board will be led by an independent Chair who will convene the diverse representatives of the education and skills sectors and ensure all are able to contribute fully as equal partners.

Report Author:

Dr Julia Katherine Director of Education and Lifelong Learning (interim),
Julia.katherine@surreycc.gov.uk.

Consulted:

- Surrey Schools Phase councils;
- Further education and skills providers;
- The local area Additional Needs and Disabilities (SEND) partnership board;
- Surrey's Health and Wellbeing Board;
- Schools Alliance for Excellence
- Wider Council services e.g. Head of Equality, Diversity, and Inclusion, No One left behind network etc

This strategy will sit alongside other key strategies that support our broader ambitions for children, young people, and adult residents in Surrey.

- Surrey Community Vision for 2030
- Surrey Skills Plan 2022
- Surrey Inclusion and Additional Needs Strategy
- Surrey All Age Autism Strategy
- Best Start to Life Strategy
- Surrey Health and Wellbeing Strategy
- Children and Young Peoples Emotional Wellbeing and Mental Health Strategy

Annexes:

Annex A Equality Impact Assessment

Annex B Data pack- Equity in Education

Annex C Equity in Education – Surrey's Lifetime of Learning Strategy

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Equity in Education

Surrey's Lifetime of Learning Strategy

Did you use the EIA Screening Tool?

Yes

1. Explaining the matter being assessed

This is a new strategy

This Equality Impact Assessment (EIA) looks at the effect on people with protected characteristics of establishing Surrey's first strategy to support a Lifetime of Learning for all Surrey residents. This Strategy covers people of all ages. Throughout the strategy and in this EIA where the term 'learner' is used this should be interpreted as including people who study in; early years, schools, Further Education, higher education and learning that takes place when you are an adult.

Surrey has a diverse and vibrant education landscape and has outcomes at each key stage above the national average. In July 2024 93.4% of our schools are either good or outstanding, 50% of our early year's settings are good and 50% are outstanding.

There are however some cohorts of children and young people who have significantly poorer outcomes than their peers, such as children who are looked after, children on free school meals, children from some minority ethnic backgrounds and children from mobile communities, such as children from Gypsy, Romany and Traveller (GRT) communities. A collaborative approach to establishing a common ambition for all learners in Surrey is essential to equity for all learners.

Adults need to be able to access learning opportunities in high quality provision to develop new skills or to secure new qualifications. We know that some areas of Surrey have adults who are less able to secure economic well-being because of skills and qualification gaps and we want to support the ambitions seen in the Surrey Skills Plan 2022 and to respond to the emerging skills gaps. The strategy will embrace the opportunities for a Lifetime of Learning.

Through realisation of the strategy, the learning offer in Surrey will allow residents of all ages rich and diverse opportunities to acquire the knowledge and skills they need at any time in their lives. Whether that is part of compulsory schooling, careers development, learning a new skill or even brushing up on maths and English to help children at home, we want to have a learning offer that meets needs at all stages of life.

The strategy is for the next six years, 2024-2030. It does not contain the detail of how the strategy's vision will be achieved. A Strategy Action Plan will be developed setting out how the actions will be achieved. This is scheduled to be in place by April 2025.

The strategy lays out a series of priority areas for the first two years of the strategy.

Equality Impact Assessment

Priorities (2024-2026):

Our key priority is to improve educational outcomes for under-served groups. We will do this through improvements to:

- **Communication and Literacy:** Enhance language and literacy skills across all age groups, focusing on vulnerable individuals who struggle with these key skills.
- **Attendance and Engagement:** Address issues leading to low attendance and disengagement, ensuring that all children and young people are fully involved in their education.
- **Emotional Well-being:** Support the emotional and mental health of learners by embedding well-being into the ethos and practices of educational settings.
- **Teacher and Leader Development:** Recruit, retain, and develop high-quality learning providers, providing ongoing professional development to ensure the best educational outcomes.

Implementation and Monitoring:

Surrey's Education Partnership (SEP) has been established to support the strategy's development and implementation, focusing on collaborative working across sectors. There will be governance oversight from the Health and Wellbeing Board and the CFLLC Select Committee.

The Strategy is aimed at ensuring that all learners, regardless of their circumstances, can access high-quality education and support throughout their lives. The strategy emphasises collaboration, inclusivity, and continuous improvement to close existing gaps in learning and well-being.

This Surrey Lifetime of Learning Strategy has been developed in consultation with key stakeholders: school phase councils; further education and skills providers; the local area Additional Needs and Disabilities (AND) partnership board known externally as (SEND (Special Educational Needs and Disabilities)); Surrey's Health and Wellbeing Board; Schools Alliance for Excellence and wider Council services.

We are now able to learn more about what our children and young people, parents and carers and community groups want from this strategy, and this will be an area we will focus on over the coming months.

How does your service proposal support the outcomes in [the Community Vision for Surrey 2030](#)?

The strategy will ensure that:

- 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

The strategy has close alignment to the Health and Wellbeing strategy, and we recognise that creating better educational equity is crucial for several key reasons, all of which have significant implications for individuals, communities, and society as a whole:

Equality Impact Assessment

1. Promotes Social Justice

- **Fairness:** Educational equity ensures that all learners, regardless of their background, have access to the resources, opportunities, and support they need to succeed. This addresses historical and systemic inequalities that have disadvantaged certain groups, particularly those based on race, ethnicity, socioeconomic status, and disability.
- **Reduces Inequality:** By levelling the playing field, educational equity helps to reduce the disparities in outcomes that exist between different social groups. This is a step towards a more just society where everyone has a fair chance to succeed.

2. Improves Economic Outcomes

- **Workforce Readiness:** A more equitable education system ensures that all learners are prepared for the workforce, leading to a more skilled and diverse labour pool. This can enhance economic productivity and innovation.
- **Economic Mobility:** Education is a key driver of economic mobility. Providing equitable educational opportunities helps individuals from disadvantaged backgrounds to improve their economic standing, breaking the cycle of poverty.

3. Enhances Social Cohesion

- **Inclusive Society:** When educational systems are equitable, they contribute to a more inclusive society where people from different backgrounds have mutual respect and understanding. This fosters social harmony and reduces the potential for conflict.
- **Civic Engagement:** Equitable education promotes active and informed citizenship. When everyone has access to quality education, they are better equipped to participate in democratic processes and contribute to the community.

4. Maximises Human Potential

- **Talent Utilisation:** Educational equity ensures that society can tap into the full range of talents and abilities of its population. When everyone can reach their potential, society benefits from a more diverse and capable workforce, leading to greater innovation and progress.
- **Personal Fulfilment:** Education is not just about economic outcomes; it also plays a crucial role in personal development and fulfilment. Equitable education enables individuals to pursue their interests and aspirations, leading to more fulfilling lives.

5. Long-Term Societal Benefits

- **Public Health:** Higher levels of education are associated with better health outcomes. By promoting educational equity, society can reduce health disparities and improve overall public health.
- **Reduction in Crime:** Studies show that educational attainment is inversely related to crime rates. By providing equitable educational opportunities, society can reduce crime and its associated social and economic costs.

Specify which of the ten Vision outcomes this work is linked to.

Equality Impact Assessment

- 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.

Are there any specific geographies in Surrey where this will make an impact?

This is a county-wide strategy. The action plan will consider the Surrey priority populations found here:

[Surrey Health and Well-Being Strategy - update 2022 | Healthy Surrey](#)

Data and information

A data pack has been developed from multiple sources to support the rationale for the strategy.

How this impact assessment was prepared

- Initial consultation with the partners attending Board meetings.
- Follow up questionnaire to Board members.
- Follow up meeting with service managers across the Education and Lifelong Learning department within Children, Families and Lifelong Learning at the Council.
- Consultation with the Health and Wellbeing Board.
- Review by Assistant Directors across Education and Lifelong Learning department within Children, Families and Lifelong Learning at the Council.
- Feedback from the CFLL Directorate Equalities Group.

2. Service Users / Residents

Who may be affected by this activity?

There are 9 protected characteristics (Equality Act 2010) to consider in your proposal. These are:

- Age including younger and older people
- Disability
- Gender reassignment
- Pregnancy and maternity
- Race including ethnic or national origins, colour or nationality

Equality Impact Assessment

- Religion or belief including lack of belief
- Sex
- Sexual orientation
- Marriage/civil partnerships

Though not included in the Equality Act 2010, Surrey County Council recognises that there are other vulnerable groups which significantly contribute to inequality across the county and therefore they should also be considered within EIAs. If relevant, you will need to include information on the following vulnerable groups (Please refer to the EIA guidance if you are unclear as to what this is).

- Members/Ex members of armed forces and relevant family members (in line with the Armed Forces Act 2021 and [Statutory Guidance on the Armed Forces Covenant Duty](#))
- Adult and young carers*
- Those experiencing digital exclusion*
- Those experiencing domestic abuse*
- Those with education/training (literacy) needs
- Those experiencing homelessness*
- Looked after children/Care leavers*
- Those living in rural/urban areas
- Those experiencing socioeconomic disadvantage*
- Out of work young people)*
- Adults with learning disabilities and/or autism*
- People with drug or alcohol use issues*
- People on probation
- People in prison
- Migrants, refugees, asylum seekers
- Sex workers
- Children with Special educational needs and disabilities*
- Adults with long term health conditions, disabilities (including SMI) and/or sensory impairment(s)*
- Older People in care homes*
- Gypsy, Roma and Traveller communities* (described as 'mobile communities by the Department for Education)
- Other (describe below)

Equality Impact Assessment

2a - Age – Positive Impact

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

The Lifetime of Learning strategy outlines ambitions for learners of all ages. As well as continuing improvement for compulsory school age learners and the early years we want to encourage an enthusiasm for wide ranging post compulsory adult learning and training provision that promotes participation in learning into older age.

The strategy promotes the development of a wide range of qualifications and skills leading into work, learning for pleasure or to develop skills to return to the workforce when a resident wants to change career. This might for example include people nearing the end of the career but need to boost their income as they find their pension does not provide enough income.

People of all ages may be impacted positively by the strategy.

- There would be greater inclusion in the needs of adults in learning. Their inclusion will ensure that they feel listened to and empowered.
- People of all ages could benefit from improved health and well-being, due to improvements in their education, irrespective of their age.
- Adults of all ages would have better access to housing and employment opportunities.

10

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

All partners will to work together to realise this strategy and it is important that we are held accountable for the outcomes. We have established a Surrey Education Partnership Board (SEP) to ensure that action plans are created which underpin the priorities and focus on what will make the difference. This group of independent stakeholders from a breadth of professions and backgrounds will be responsible for providing the peer support, challenge and monitoring needed to ensure the actions lead to the desired outcomes.

This Board will also be responsible for the creation of key performance indicators so that all are clear about what success looks like and how we will know if we have achieved our priorities.

Work to co-design and reshape the services by listening to the voice of people of all ages through the use of networks to ensure that the learning offer meets the needs of Surrey residents.

Ensure people of all ages have access to information and advice. Regarding the learning opportunities available.

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?

Equality Impact Assessment

There are a wide range of strategies that are working towards improving services for children, young people and adults in Surrey. Each of the following strategies contributes to the work, but there are also interrelationships between them.

- Surrey Community Vision for 2030
- Surrey Skills Plan 2022
- Surrey Inclusion and Additional Needs Strategy
- Surrey All Age Autism Strategy
- Best Start to Life Strategy
- Surrey Health and Wellbeing Strategy
- Children and Young Peoples Emotional Wellbeing and Mental Health Strategy

Any negative impacts that cannot be mitigated?

None Identified.

2b Disability (Including people with a Learning Disability, Autism and Additional Needs) - Positive Impact

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

10

The work that is encompassed within the strategy is considered relevant to improving the outcomes of people who have an additional need and / or a disability, as these are a group that are negatively impacted in terms of achievement of outcomes.

In the strategy, one of the ambitions is:

We want to ensure that learners who are disadvantaged, are vulnerable or who have additional needs and /or disabilities have access to a high quality, local school and that we close the gap in terms of outcomes, exclusions, and attendance.

This means ensuring that pupils can access and be fully included in schools and settings of their choice. Our role is to maintain a strategic overview of admissions, inclusion, special education needs and the educational progress of all children young people and adults especially the most vulnerable regardless of whatever state-funded school or setting they attend. In discharging this responsibility, we expect all educational providers to provide high quality education and support to the most vulnerable in order to fulfil this responsibility.

As part of our Inclusion and Additional Needs Strategy, we have focused on making sure children and young people receive the right support from the right professionals at the right time. Lifetime of Learning strategy aligns its work with this strategy.

Equality Impact Assessment

Surrey's All Age Autism (AAA) strategy states:

Surrey's population in 2021 is projected to be 1.23 million and our best approximation of its autistic population is 12,300 people, made up of: 3,200 children aged 17 and under 900 young people aged 18-24 (PANSI 2021 projections for Surrey) 8,200 people aged 25 and over (PANSI and POPPI 2021 projections for Surrey).

The AAA strategy outlines the aspiration to ensure all children, young people, and adults with autism in Surrey benefit from improved health and wellbeing, feel listened to and empowered, know where to find relevant information and can navigate the system, and have better access to housing and employment opportunities. The Lifetime of Learning strategy also focuses on providing access to learning opportunities for disadvantaged, vulnerable, and least likely to participate adults.

The potential barriers to people with a disability benefiting from this strategy reflect the concerns identified nationally. This includes concerns around accessibility of information, transport, housing, the physical environment, the built environment as well as the access to the assistance they need in order to attend learning courses.

10 There may also be additional barriers in relation to attitudes towards disability, psychological barriers, such as low self-esteem or anxiety plus the potential impact of lower incomes often experienced by people with disabilities.

People with disabilities will be impacted in a positive way through the need for improvement in:

- Involvement in worthwhile learning activities throughout their lifetime of learning. Which in turn increases the opportunities for social participation.
- Staff will be appropriately skilled and trained to work with people with disabilities and they will be aware of the technological and other support needed in order to support them access learning.

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

The establishment of an independent board and clear governance arrangements to oversee the action plan (as described in section 2a above).

We will also:

- Ensure that learning opportunities are accessible and that those responsible for the provision of learning understand how we can provide support and reasonable adjustments to meet the needs of people with disabilities.
- Ensure that people with a disability are fully involved in identifying the learning services they require.
- Ensure that people with a disability have the right information, advice and guidance to select learning opportunities, at the right place, at the right time, in accordance with their needs.

Equality Impact Assessment

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?

There are a wide range of strategies that are working towards improving services for children, young people and adults in Surrey. The following strategies contribute to the work in its own right, but there are also interrelationships between them. The specific strategies that will provide support for these groups are:

- Surrey Community Vision for 2030
- Surrey Inclusion and Additional Needs Strategy
- Surrey All Age Autism Strategy
- Children and Young Peoples Emotional Wellbeing and Mental Health Strategy

The Lifetime of Learning Strategy will support the achievement of the objectives found in the Additional Needs and Disabilities (SEND) improvement plan found here: [Local Area SEND Strategic Improvement Plan \(surreylocaloffer.org.uk\)](https://www.surreylocaloffer.org.uk)

Any negative impacts that cannot be mitigated?

None Identified.

10

SEX – Positive Impact

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

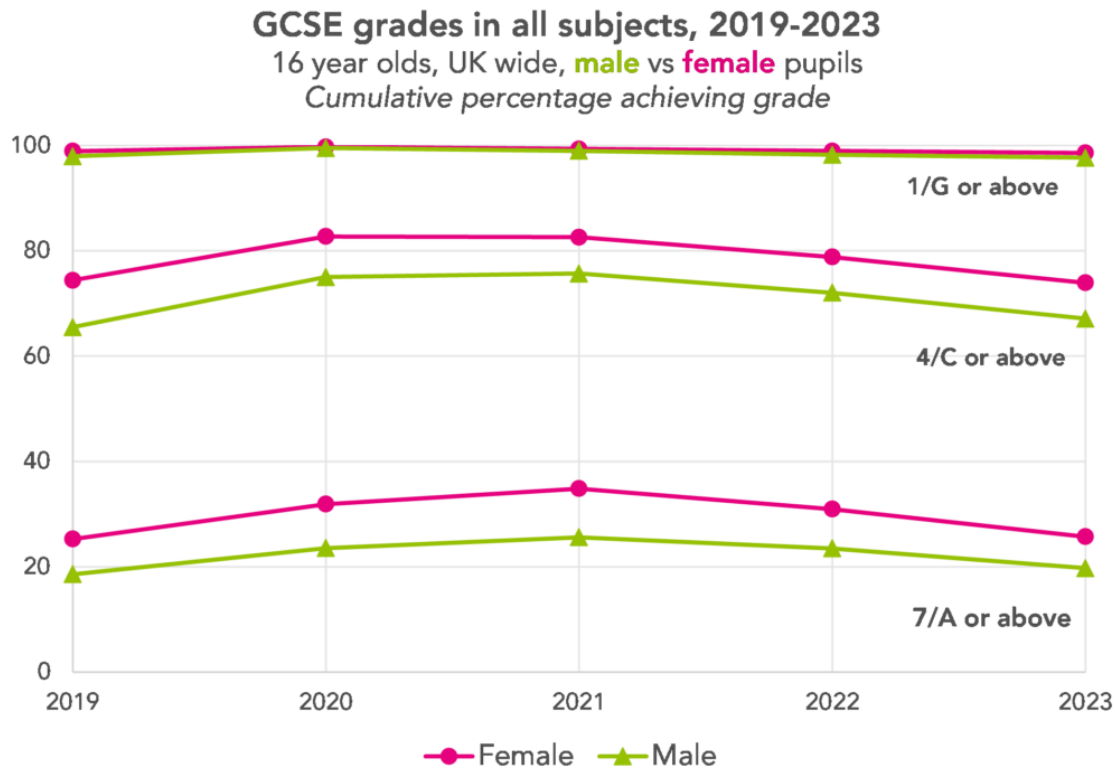
The Lifetime of Learning Strategy focusses on continuing to ensure we champion educational excellence for all learners who are encouraged to achieve outstanding outcomes. This means creating the necessary conditions and environment for success and celebrating the achievement of children and young people in education and that of their setting or schools.

It means a collective commitment to setting or school improvement that challenges and tackles all forms of underperformance. It means providing support, challenge, and early intervention to ensure that schools and settings retain their autonomy.

The gender gap in top grades narrowed in 2023

In 2023 25.7% of GCSEs entered by female pupils achieved a grade 7 or above, compared to 19.7% of those entered by male pupils.

Equality Impact Assessment



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Gender gaps in GCSE grades are a long-term trend, but the gap in those achieving top grades widened during the pandemic.

At its peak in 2021, it stood at 9.2 percentage points. In 2023 the gap of 6.0 percentage points is lower than the pre-pandemic gap of 6.7 percentage points in 2019.

On the other hand, the gender gap in those achieving grade 9-4 narrowed slightly during the pandemic. In 2019, it stood at 8.9 percentage points but fell to 6.9 percentage points in 2021.

In 2023, the gap at grades 9-4 is at its lowest level since 2019, just 6.8 percentage points, with 73.9% of GCSEs entered by female pupils and 67.1% those entered by male pupils achieving 9-4. At the time of writing the GCSE results have not been published.

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

The establishment of an independent board and clear governance arrangements to oversee the action plan (as described on page 6 above).

Narrowing the gap in performance between groups of pupils continues to be a focus of Surrey County Council and schools.

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 Identified.

Equality Impact Assessment

Any negative impacts that cannot be mitigated?

None Identified.

Race/Ethnicity/Religion/Belief – Positive Impact

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

The aim of the strategy is to continue the positive impact of education improvement and achievement on Surrey residents. It aims to ensure a curriculum that represents the diversity of our community, promotes aspiration for children, young people and their parents and equips children, young people and adults with the knowledge and cultural capital to succeed in life.

Our data shows that there are some groups who perform less well than others from particular groups. Among the most noticeable are those from our Gypsy, Roma and Traveller (GRT) community.

As a result of an agreed Lifetime of Learning strategy, we will continue to focus on groups who are at risk of underperforming as well as encourage others who are already achieving well to reach their full potential. The strategy focuses on helping underperforming communities like GRT groups learn and get empowered so they can contribute to their communities' economic and social development.

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

- The Council collects and uses good quality data and research to work with schools and learning providers in raising achievement of all pupils including those from Black and Minority Ethnic Groups (BME) and GRT groups.
- The establishment of an independent board and clear governance arrangements to oversee the action plan (as described on page 6 above)

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?

There are a wide range of strategies that are working towards improving services for children and young people in Surrey. Each of the following strategies contributes to the work in its own right, but there are also interrelationships between them.

- Surrey Community Vision for 2030
- Surrey Inclusion and Additional Needs Strategy
- Surrey Health and Wellbeing Strategy
- Children and Young Peoples Emotional Wellbeing and Mental Health Strategy.

Equality Impact Assessment

Any negative impacts that cannot be mitigated?

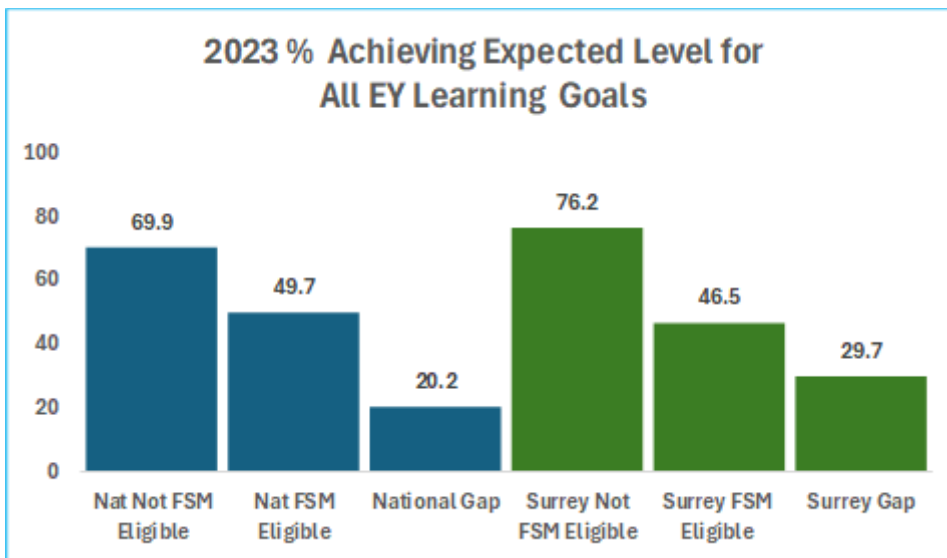
None Identified.

Socioeconomic disadvantage – Positive Impact

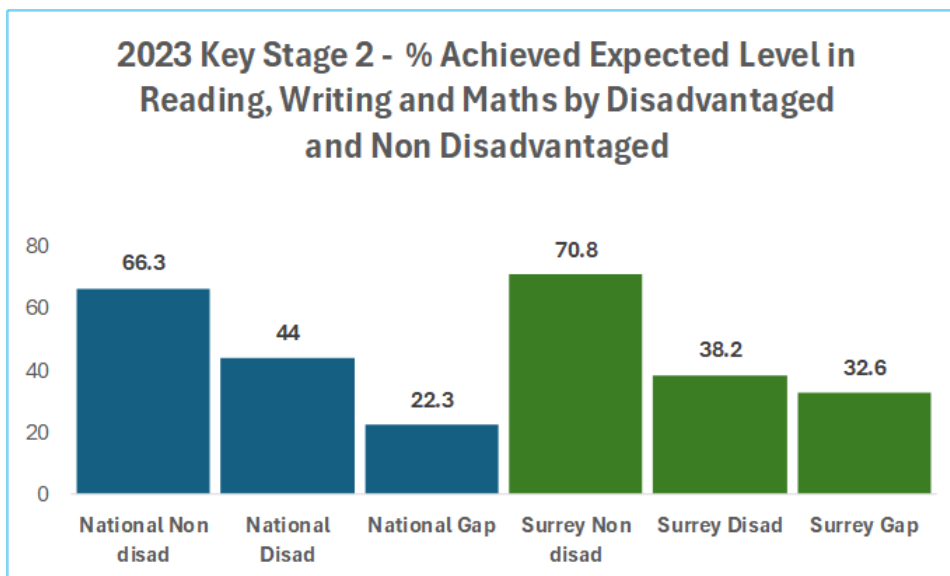
Describe here the considerations and concerns in relation to the programme/policy for the selected group.

Percentage of children achieving at least expected level of achievement across all Early Years (EY) learning goals –Free School Meals (FSM) Non-Eligible and FSM Eligible

(Nexus has NCER National data figures which we cannot use outside Surrey)



% of children achieving Reading Writing and Maths (RWM) at end of Key Stage 2 (KS2) disadvantaged v non disadvantaged

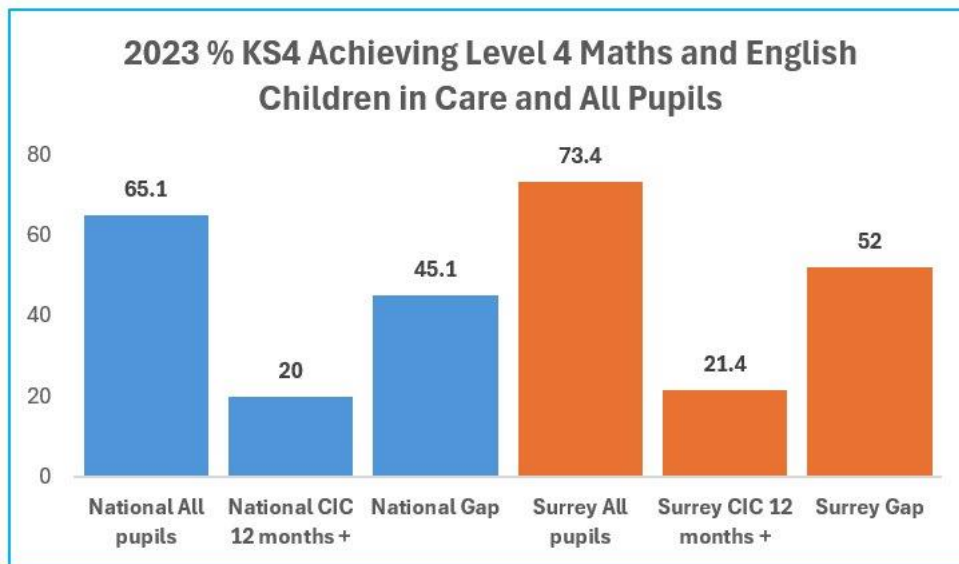


Equality Impact Assessment

This picture is similar when you observe the data for the % of pupils achieving Key stage 4 (KS4) 9-5 grades in English and Maths by disadvantaged v non disadvantaged

Historical data from 2021/22 shows that 77% of disadvantaged pupils went from Key Stage 4 (KS4) to a sustained post-16 education destination compared with 91% who were not disadvantaged – a gap of 15 percentage points.

% of children achieving L4+ in maths and English at KS4
Children In Care v all children



10

The **Lifetime of Learning** strategy articulates the urgency of continuing to ensure a keen focus on narrowing gaps in educational attainment between groups of pupils particularly for those of a disadvantaged socio-economic background.

In addition to improving access to career education, information, advice, and guidance, the strategy also aims to create clear pathways for learning, employment, and training, as well as enhance and facilitate collaborative efforts and between businesses and education and skills providers.

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

- The establishment of an independent board and clear governance arrangements to oversee the action plan (as described on page 6 above).
- National careers service (The National Careers Service (NCS) is a publicly funded careers service for adults and young people).

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?

There are a wide range of strategies that are working towards improving services for children, young people and adults in Surrey. Each of the following strategies contributes to the work in its own right, but there are also interrelationships between them.

Equality Impact Assessment

- Surrey Community Vision for 2030
- Surrey Skills Plan 2022
- Surrey Health and Wellbeing Strategy
- Children and Young Peoples Emotional Wellbeing and Mental Health Strategy

Any negative impacts that cannot be mitigated?

None Identified.

Education/training (literacy) needs and Out of Work Young People/Adults - Positive Impact

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

One of the priority pieces of work we have established as part of the strategy is focused on literacy as we are aware that improvements to literacy may improve life expectancy.

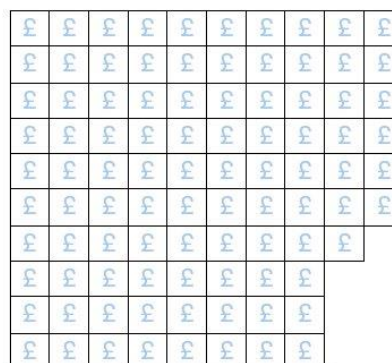
There are a wide range of strategies that are working towards improving services for children, young people and adults in Surrey. Each of the following strategies contributes to the work in its own right, but there are also interrelationships between them.

- Surrey Community Vision for 2030
- Surrey Skills Plan 2022
- Surrey Inclusion and Additional Needs Strategy
- Surrey All Age Autism Strategy
- Best Start to Life Strategy
- Surrey Health and Wellbeing Strategy
- Children and Young Peoples Emotional Wellbeing and Mental Health Strategy

Impact of levels of Literacy against income



Worker with basic literacy



Worker with very low literacy

Pro Bono economics, 2021

Equality Impact Assessment

- 1 in 6 (16.4%) adults in England are estimated to have very low literacy, which means they may struggle with longer texts and unfamiliar topics (OECD, 2016).
- The average worker in the UK with very low literacy will earn approximately 7.1% less than if they had a basic level of literacy. This means that they would need to work an additional 1.5 years over their lifetime to make up for this disparity (Pro Bono economics, 2021).
- A girl born in a ward with some of the greatest literacy challenges in the country will live 20.9 years shorter than a girl born in a ward with some of the fewest literacy challenges (The National Literacy Trust, 2018).

Link between Literacy against life expectancy



10

National Literacy Trust 2022

To meet the literacy needs of children, young people and adults in Surrey, the strategy outlines the approach and activities needed. This means ensuring that all learners have access to appropriate resources. Teachers and literacy professionals will also get training, resources, and support for delivering literacy programs effectively.

We aim to make learning pathways more relevant for post-16 learners by anticipating and adapting to future skills needs, assessing impact, easing transitions, strengthening connections, preventing young people from leaving school early, supporting refugees to re-enter learning pathways and employment, and nurturing learner aspirations. In the strategy, we aim to keep Surrey's adult education curriculum innovative and ambitious, improving social inclusion, mental health, and confidence among adults.

By working with partners, the Surrey Post-16 Education Partnership will develop a coherent post-16 education system, ensure strong partnerships with local businesses, and provide young people with opportunities to transition from education to employment in a partnership approach, including high quality vocational training, work experience and interactions with world of work at appropriate stages.

Equality Impact Assessment

Young people and adults will have access to exceptional personal development opportunities and be equipped with high quality employability, digital, and professional skills so they can make a positive contribution to society. The strategy will consider any negative impact that has arisen due to the potential long term impact of the covid pandemic.

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

The establishment of an independent board and clear governance arrangements to oversee the action plan (as described on page 6 above)

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?

There are a wide range of strategies that are working towards improving services for children, young people and adults in Surrey. Each of the following strategies contributes to the work in its own right, but there are also interrelationships between them.

- Surrey Community Vision for 2030
- Surrey Skills Plan 2022
- Surrey Inclusion and Additional Needs Strategy
- Surrey Health and Wellbeing Strategy

10

Any negative impacts that cannot be mitigated?

None Identified.

Equality Impact Assessment

3. Staff

No specific impacts upon staff with protected characteristics have been identified at the time of writing. Surrey Education Partnership Board will assess all planned activity and put in place any actions to manage any negative impacts should they emerge.

It is likely that there will be positive changes in working practices in education teams working on the actions laid out in the action plan.

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

We expect our strategy to have a positive impact on all the staff contributing towards delivering this strategy. Consequently, we will be able to recruit, retain, and develop the best teachers, practitioners, and leaders in education. The training opportunities and networks will be developed to recognize the value of highly qualified and experienced professionals.

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

Training and development opportunities will be available to all staff across the council and education settings when or if they are identified.

10

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 Impact Assessment

[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:

Outcome1: 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

Explanation: This Equalities Impact Assessment has not identified any potential for discrimination or negative impact. The strategy implementation plan will take all opportunities to promote equality and improve the lived experience and outcomes for all children and young people and adults.

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	Update/Notes	Open/ Closed
1	Jan 2024	Finalise Strategy Draft	Julia Katherine & Jo McSherrie	October 2024 Revised date 26/11/24	16/9/24 - it is likely that the Cabinet will be asked to approve the strategy in the November meeting	
2	March 2024	Development of Surrey Education Partnership Board	Julia Katherine & Jo McSherrie	December 2024	Shadow Board and Independent chair in place. Diverse representation including HWB member and resident.	
3	March 2024	Ensure representative groups are part of the Board	Independent chair & Julia Katherine	December 2024	Regular review of Board membership	
4	October 2024	Develop Surrey education accountability framework with partners to meet the priority objectives	Independent chair & Julia Katherine	March 2025		

Equality Impact Assessment

5	December 2024	Develop accessible materials, information and communication about the strategy	Independent chair & Julia Katherine	March 2025		

6a. Version control

Version Number	Purpose/Change	Author	Date
V1	Initial Draft	Jo McSherrie	19/8/24
V2	Changes made following DEG meeting on 11/9/24	Jo McSherrie	16/09/24
V3	Changes made following feedback from Rachael Wardell	Jo McSherrie	04/10/24

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.

Equality Impact Assessment

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
Director	20/08/24
Executive Director	
Cabinet Member	
Directorate Equality Group/ EDI Group (If Applicable) (arrangements will differ depending on your Directorate. Please enquire with your Head of Service or the CSP Team if unsure)	

Publish:

It is recommended that all EIAs are published on Surrey County Council's website.

Please send approved EIAs to: equalityimpactassessments@surreycc.gov.uk

EIA author: Jo McSherrie

6c. EIA Team

Name	Job Title	Organisation	Team Role
Jo McSherrie	Service Manager Policy & System Development	Surrey County Council	Director support for development

If you would like this information in large print, Braille, on CD or in another language please contact us on:

Tel: 03456 009 009

Textphone (via Text Relay): 18001 03456 009 009

SMS: 07860 053 465

Email: contactcentre@surreycc.gov.uk



SURREY
COUNTY COUNCIL

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Data Pack – Equity in Education – Surrey’s Lifetime of Learning Strategy

Underachievement in outcomes and inequity in well-being and belonging is notable even before children reach school age and their readiness for school.

Overall, with the notable exception of children in the care of the local authority at KS4, at every age and stage of learning Surrey's disadvantaged learners do less well than their counterparts in other counties or areas nationally.

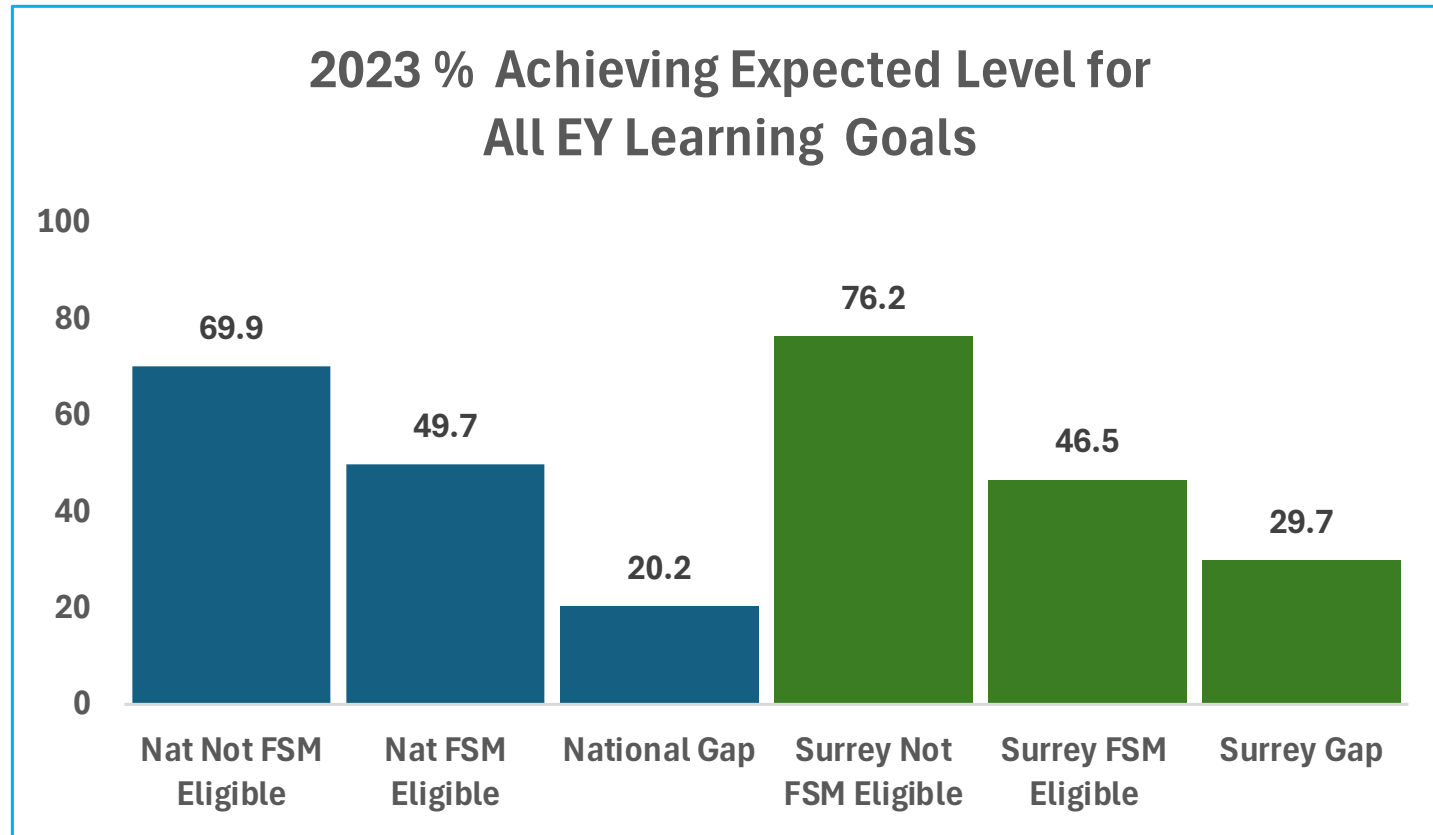
Once a child learner falls behind their peers, the disadvantage gap can persist throughout their whole lifetime of learning.

The Department for Education (DfE) definition of 'Disadvantaged' is that a person:

- has received Free School Meals (FSM) with the last 6 years or
- is in the care of the Local Authority as a child looked after (CLA) or
- was ever in the care of the Local Authority (PCLA) or
- is adopted

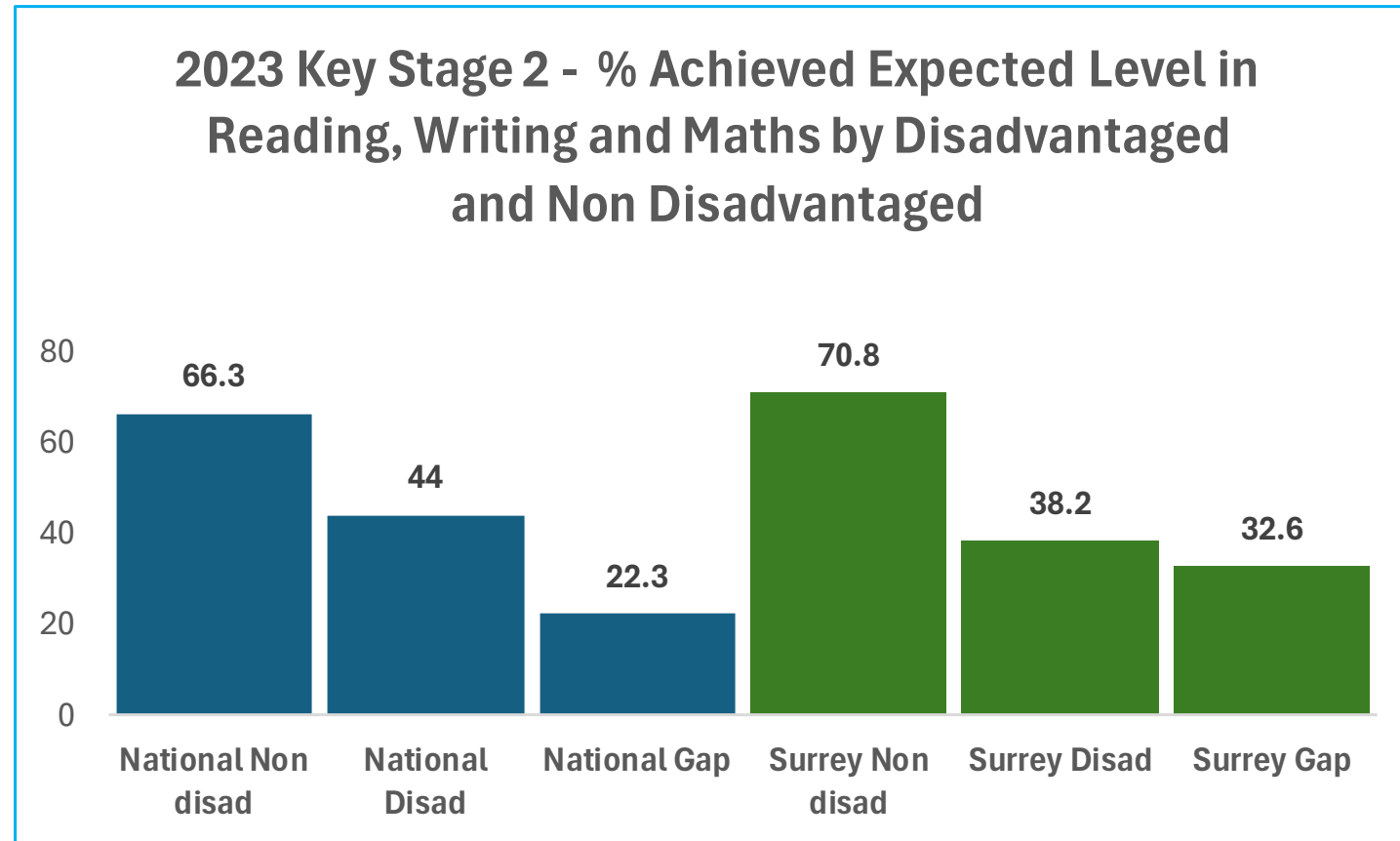
NB Eligibility for Free School Meals is income dependent. It also means that the school receives service pupil premium. If a child is part of a family in the Armed Forces they will get pupil premium funding, but this does not necessary lead them to be classed as disadvantaged for DfE reporting purposes unless they meet one of the criteria above.

Percentage of children achieving at least expected level of achievement across all learning goals –Free School Meals (FSM) Non-Eligible and FSM Eligible



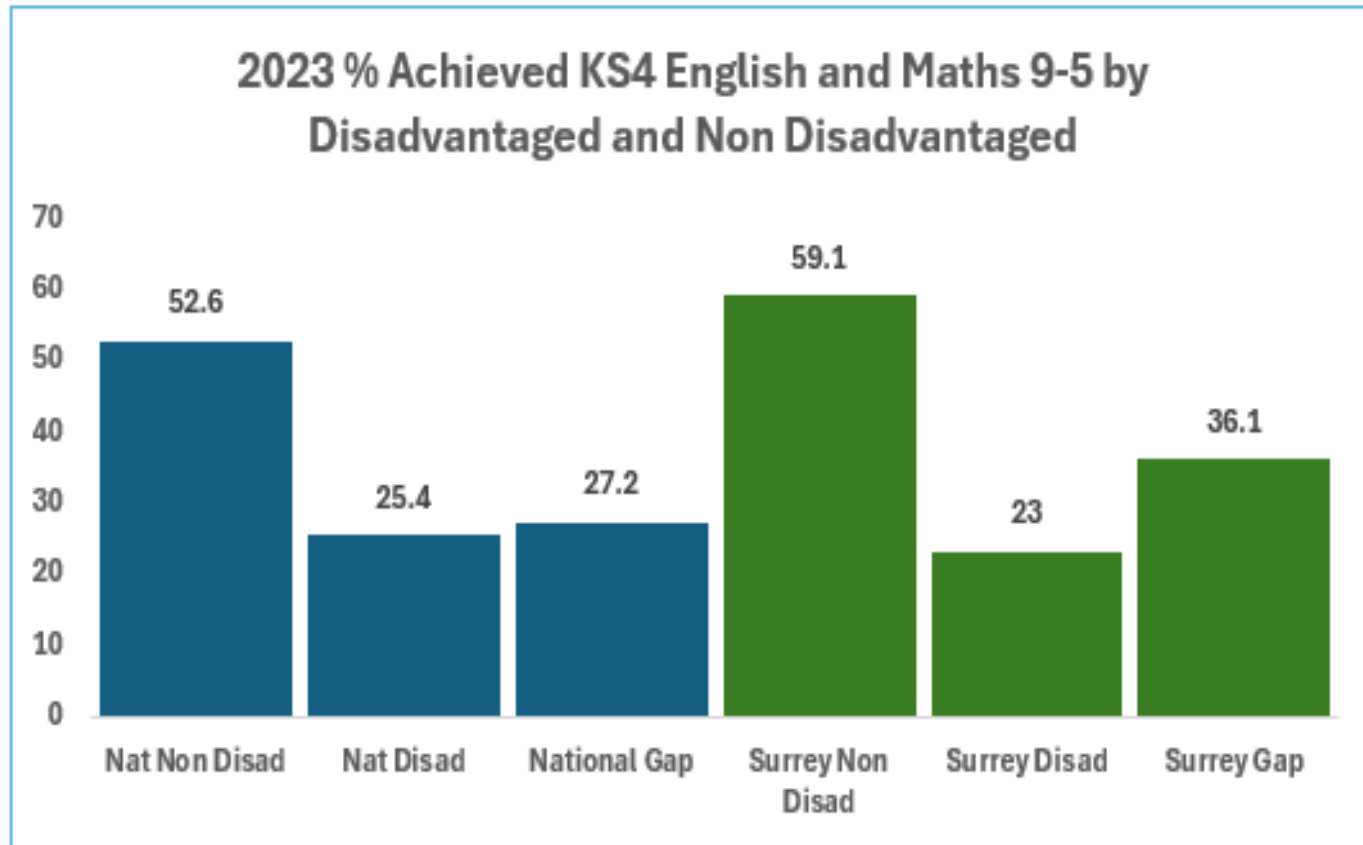
Source 2023 Department for Education (DfE)
Early Year Foundation Stage (EYFSP) Outcomes
and Nexus

% of children achieving Reading Writing and Maths (RWM) at end of Key Stage 2 (KS2) disadvantaged v non disadvantaged



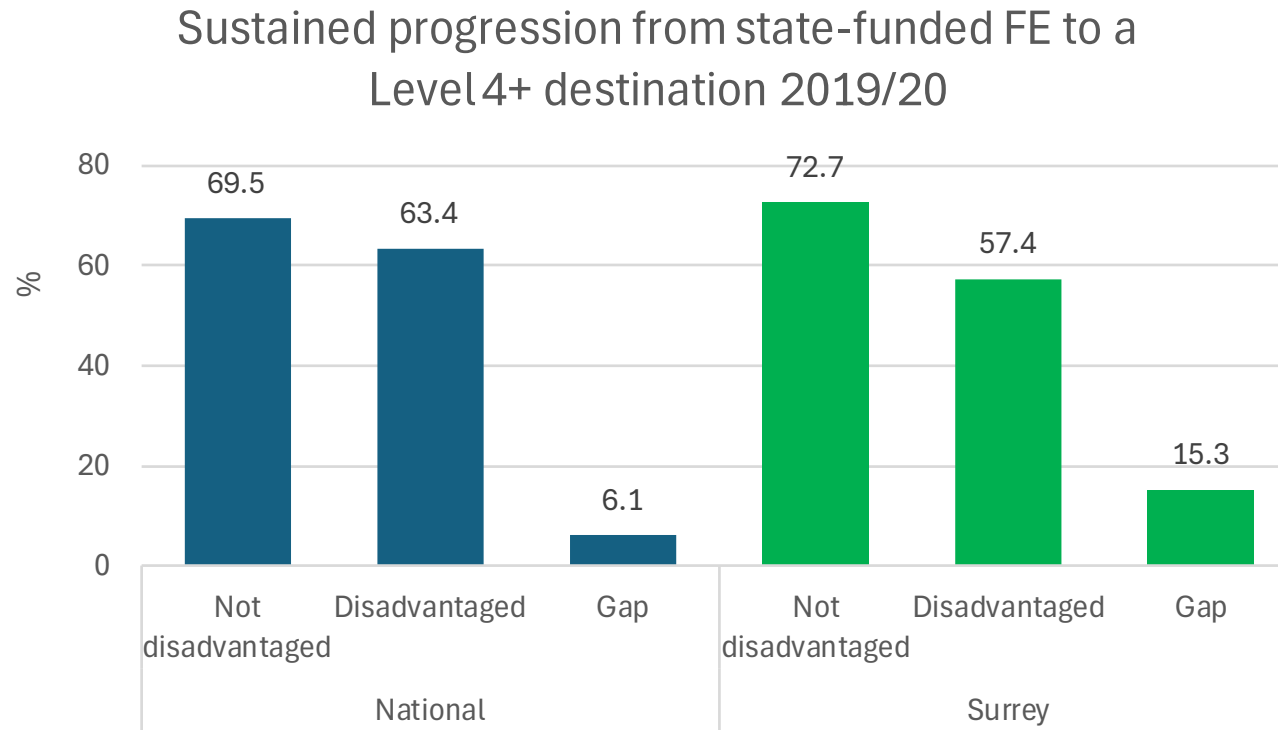
Source 2023 Nexus

% of pupils achieving Key stage 4 (KS4) 9-5 grades in English and Maths by disadvantaged v non disadvantaged



Source 2023 DfE

% of pupils progressing from state funded Further Education (FE) to a sustained level 4+ destination by year 11 Free School Meals (FSM) status

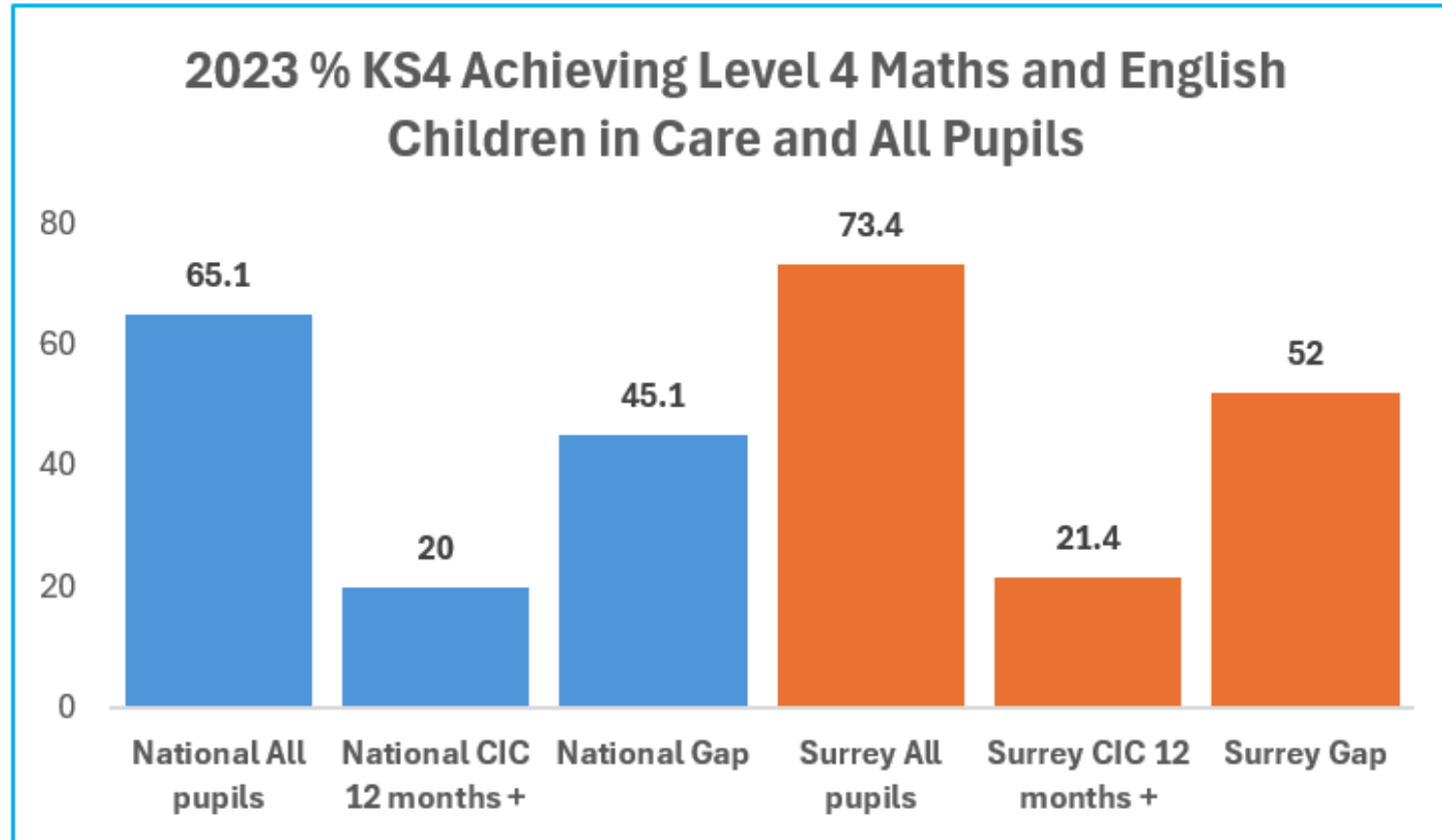


Source DfE Explore Education Statistics service

In 2021/22, 77% of disadvantaged pupils went from Key Stage 4 (KS4) to a sustained post-16 education destination compared with 91% who were not disadvantaged – a gap of 15 percentage points

The gap progressing from Further Education (FE) to Higher Education (HE) is therefore already from a lower base starting point. Unfortunately, data from KS4 to HE is not available

% of children achieving L4+ in maths and English at KS4 Children In Care v all children



Source 2023 DfE Looked after Child (LAC) Outcomes

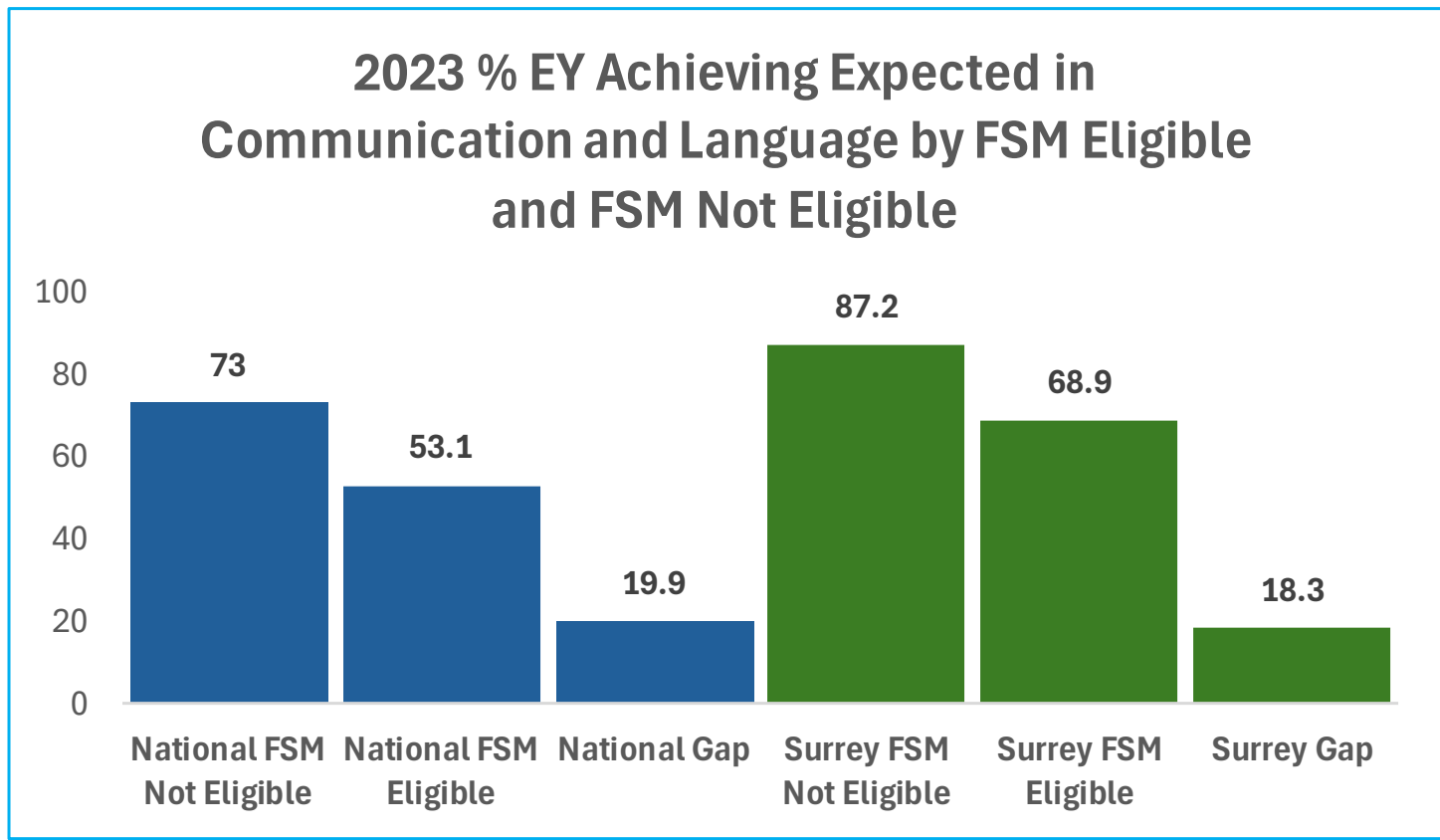
Improving communication, language and literacy has a significant impact on all-round achievement and progress throughout all phases of education and beyond.

While most Surrey learners do well, many of our vulnerable children, young people and adults continue to struggle to achieve the key skills of reading, writing and oracy needed to succeed in education and life.

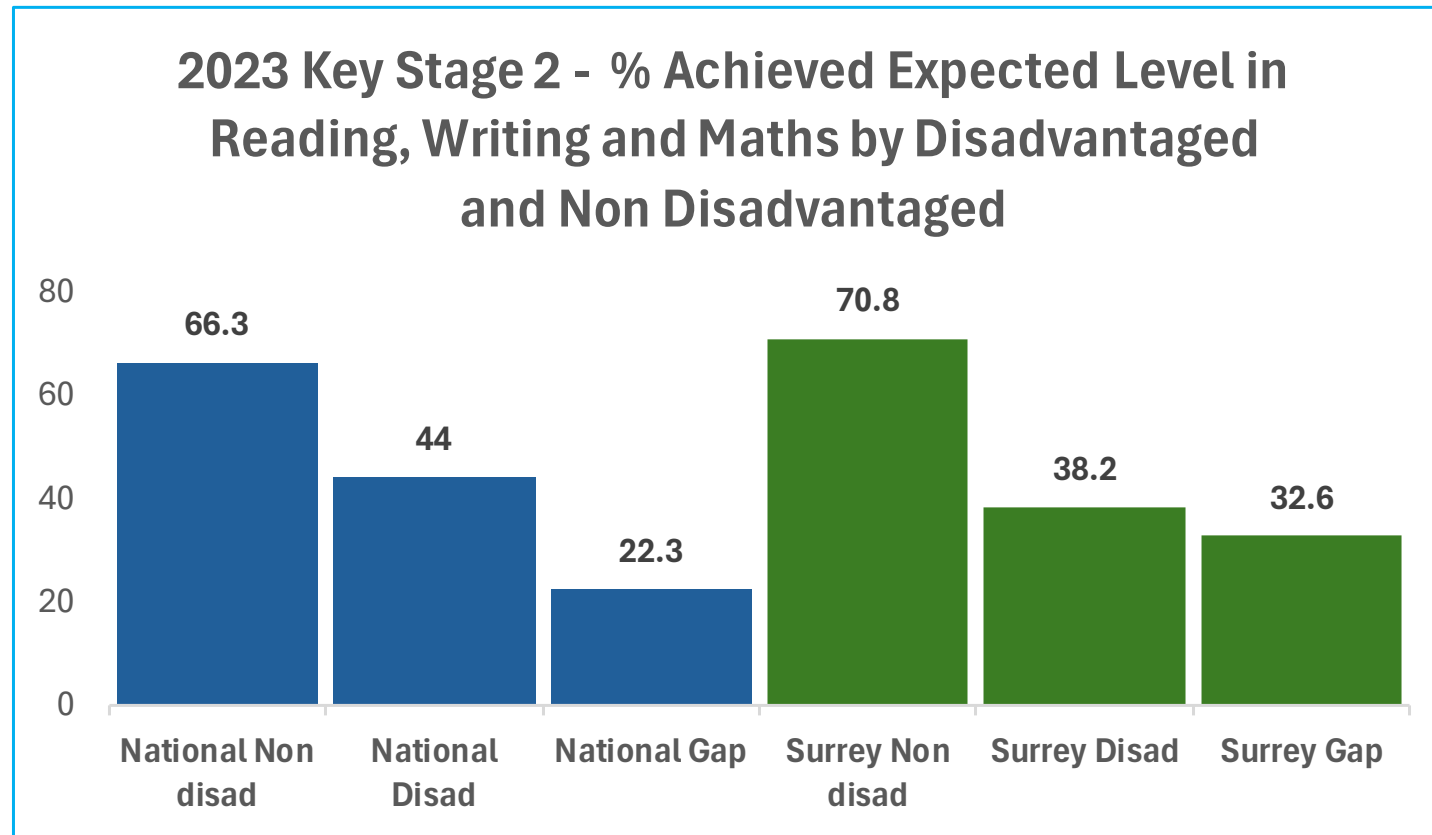
Surrey Early Years children, eligible for Free School Meals, achieved higher outcomes for Communication and Language compared with national, and there is a smaller gap than national.

Surrey Early Years children not eligible for FSM achieved a higher than expected level in Communication and Language than national by 14.2 percentage points.

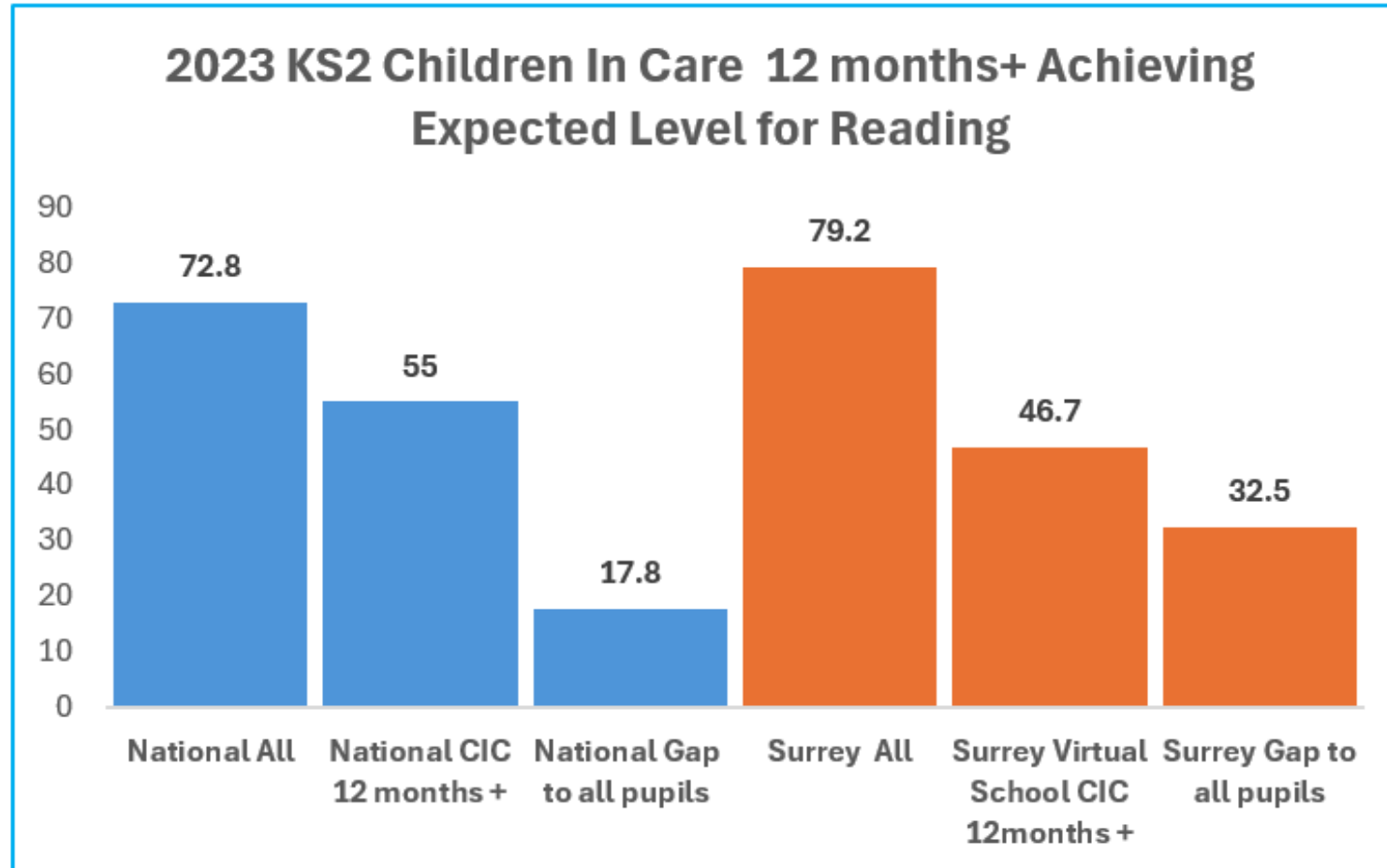
Percentage of children achieving at least expected level of achievement at Foundation Stage Profile (FSP) in communication and language – FSM Eligible and FSM Not Eligible



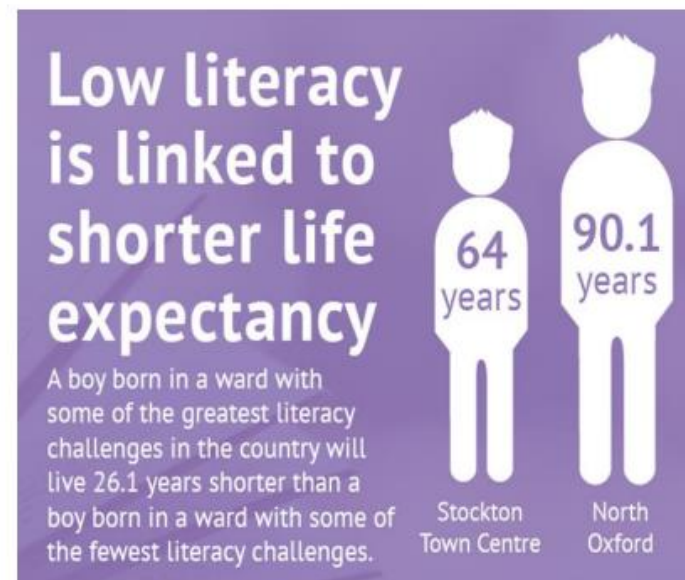
% of pupils achieving expected standard of reading KS2
– disadvantaged and non-disadvantaged, Looked after Child (LAC)



% of pupils achieving expected standard of reading KS2 – Children In Care v all pupils



The impact of literacy on wider life chances – life expectancy



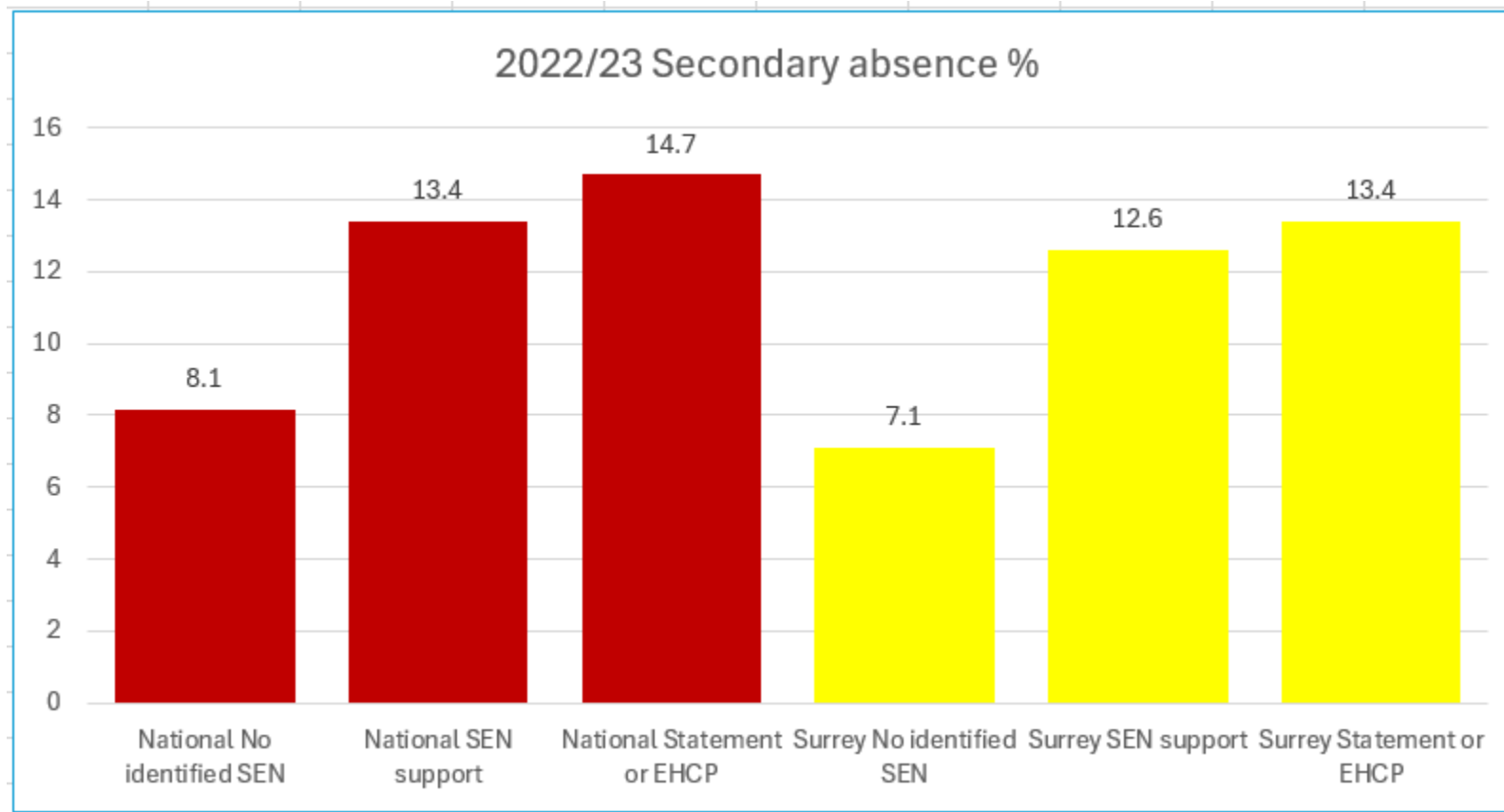
National Literacy Trust 2022

Regular attendance and engagement is an important part of giving Children and Young People (CYP) the best possible start in life and enabling all to make a significant positive contribution to society.

When children miss nursery, school or college, they miss out on valuable learning opportunities, which can have a significant impact on their academic progress.

Poor attendance and engagement can also lead to social isolation, low self-esteem, and a lack of engagement. We know that there is a strong correlation between socio-economic background and attendance and engagement.

Secondary Overall Absence Special Education Needs (SEN) Support and Education Health and Care Plan (EHCP) v non



Source DfE Explore Education Statistics service

Overall Absence and Persistent Absence – Surrey absence figures are lower than National and the South-east

		Autumn 2021/22	Autumn 2022/23	Autumn 2023/24
England	Overall absence rate	6.9%	7.5%	6.7%
	% of persistent absentees (10% or more missed)	23.5%	24.2%	19.4%
South East	Overall absence rate	6.9%	7.6%	6.6%
	% of persistent absentees (10% or more missed)	23.4%	24.5%	19.0%
Surrey	Overall absence rate	6.4%	7.0%	6.0%
	% of persistent absentees (10% or more missed)	22.1%	21.6%	16.8%

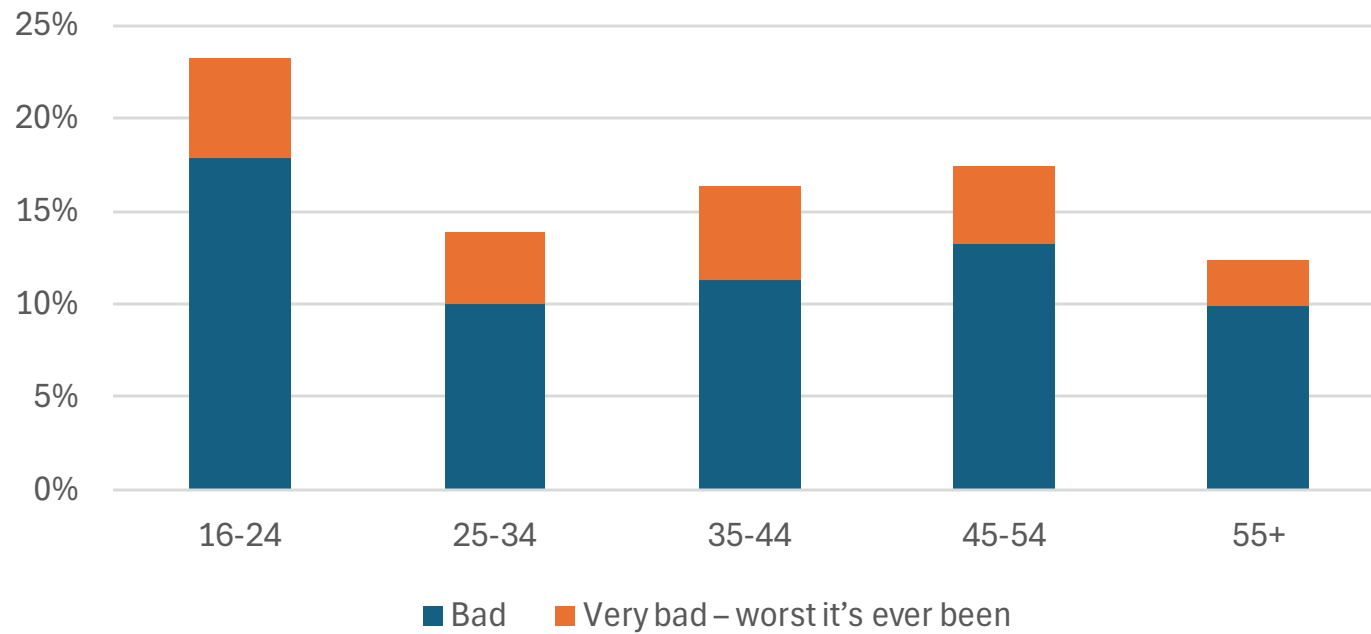
In the wake of the pandemic and the challenges of our current society the physical and mental health of our children, young people and adults is more challenged than ever.

To make real impact in this area of work, health and well-being needs to be built into the ethos, curriculum and practices of our Early years, school, college and Post-16 life.

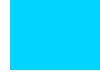
In 2020/21 Surrey had a lower self reported anxiety score compared to national and regional.

Mental health by age in the UK

Self-assessment of poor mental health by age in the UK, 2024

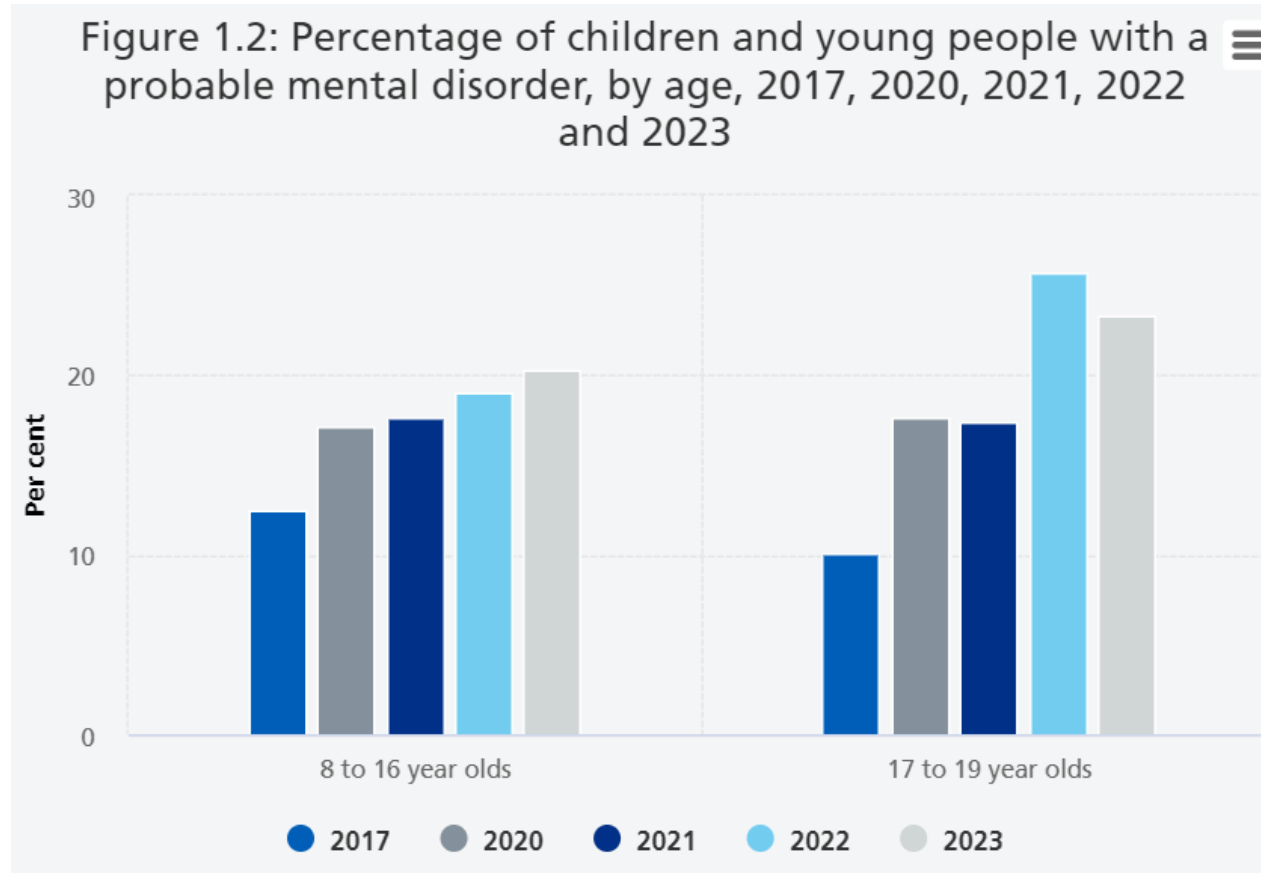


Young people, aged 16-24 are the most affected by mental health struggles, with nearly a quarter (23.5%) describing their mental health as either bad or the worst it's ever been.



Mental health in children and young people – increase in likely mental health difficulties

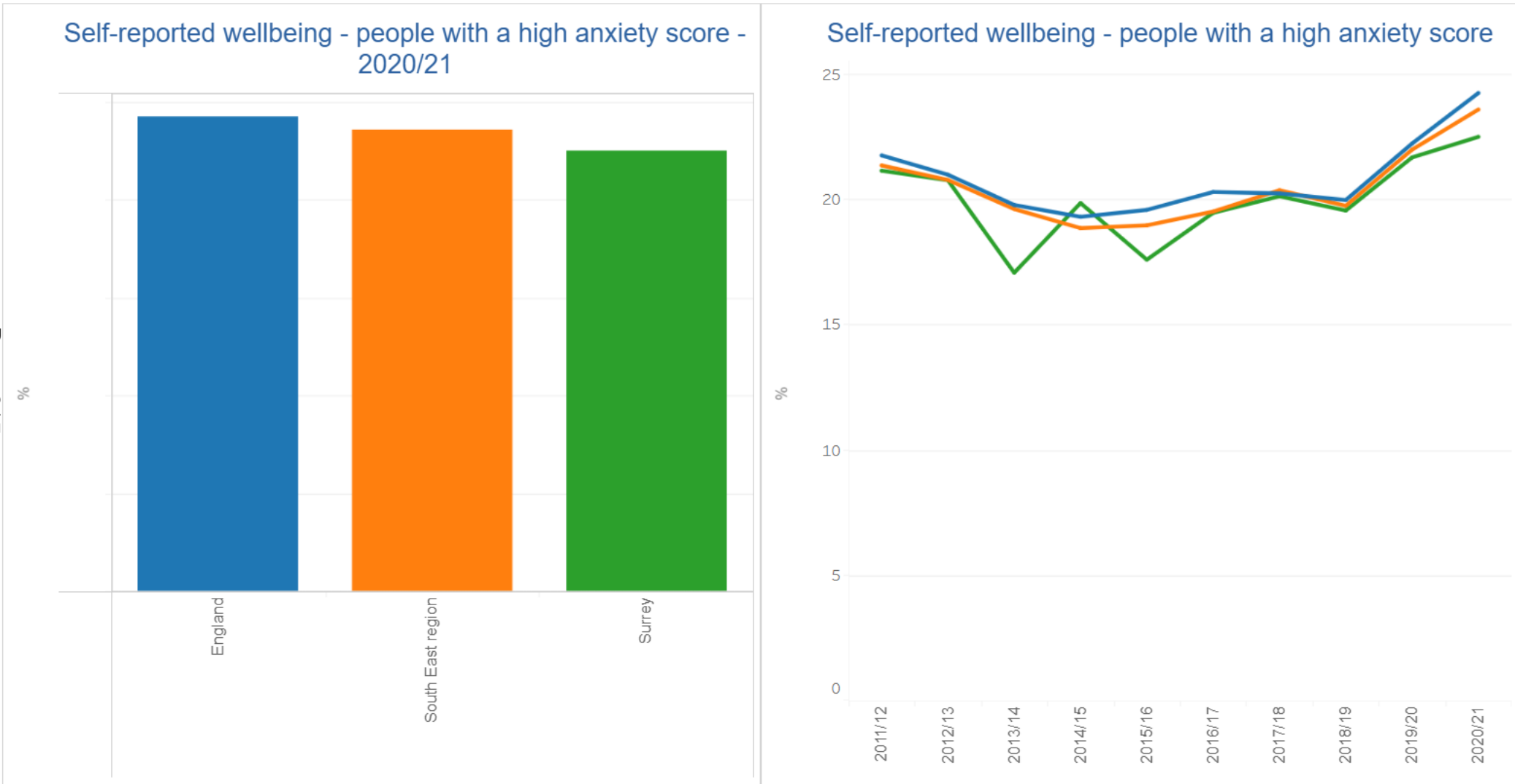
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NHS England 2023

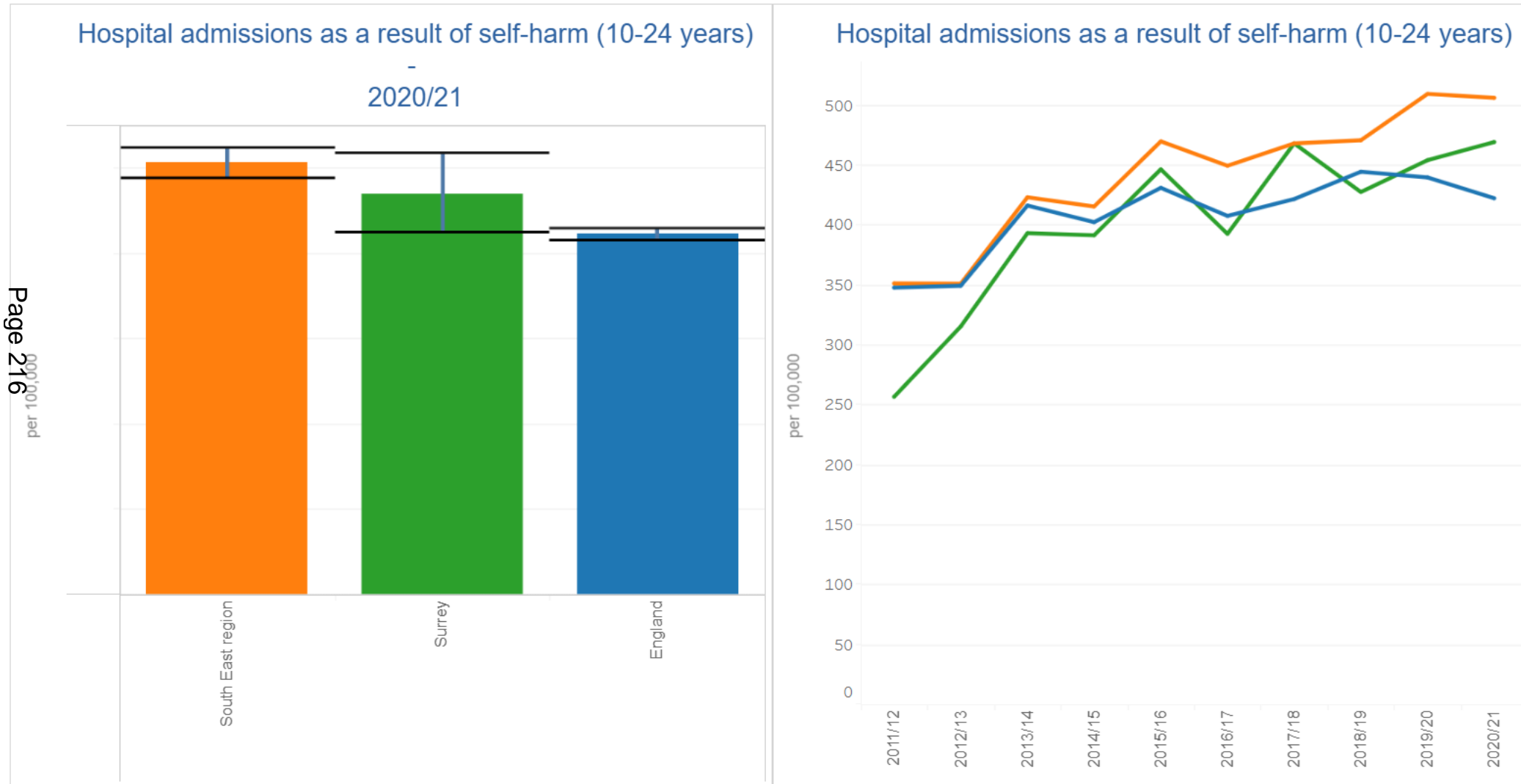
Self-reported wellbeing – people with a high anxiety score 2020/21 – Surrey compared with national and regional

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Hospital admissions as a result of self-harm (10-24 years) – 2020/21

Surrey compared with national and regional



We will not achieve our ambitions without ensuring we have sufficient education practitioners and experts across all phases and ensuring deep and long-term support to improve the quality of leadership and teaching.

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Early Years professionals, teachers and lecturers are our most precious resource.

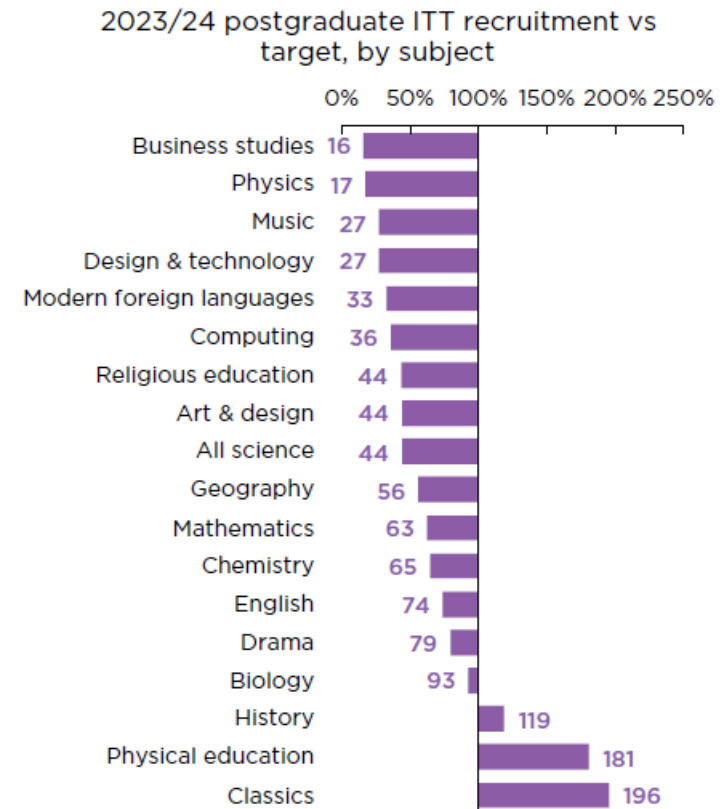
We know too that support staff play a key part in helping our education system thrive.

Postgraduate Initial Teacher Training (ITT) recruitment vs target – national trends by phase and by subject

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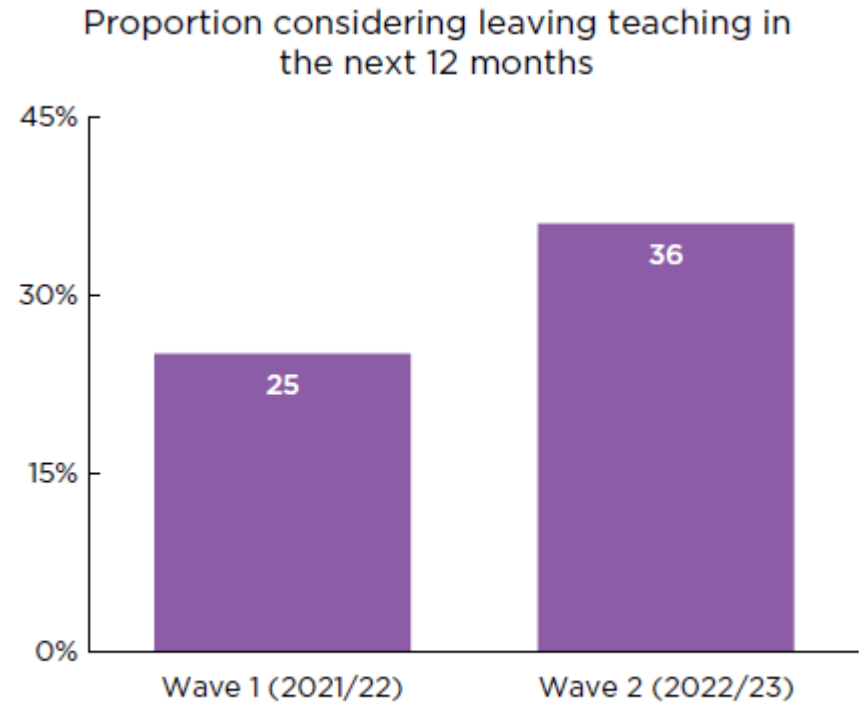
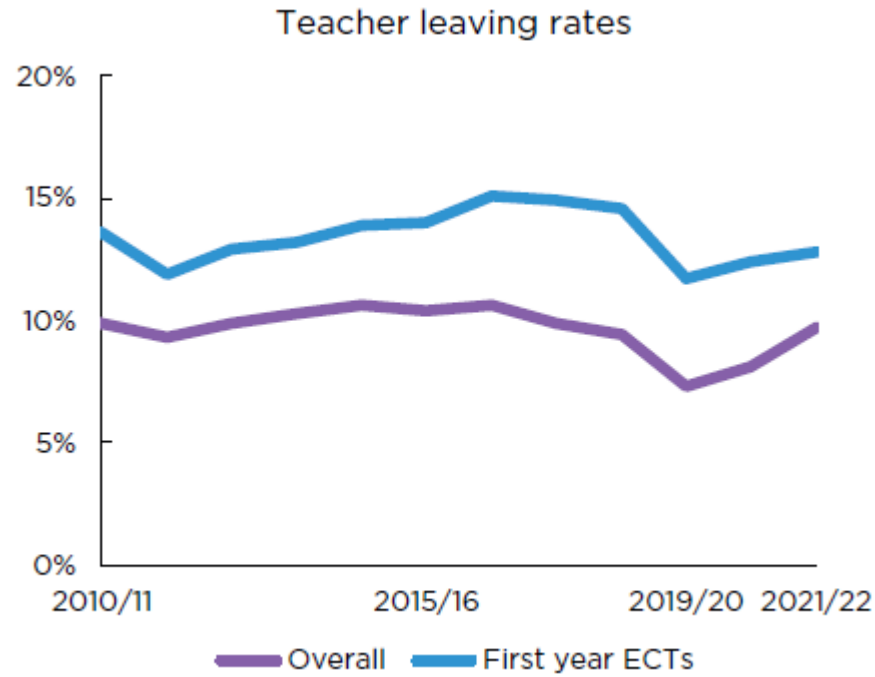
Source: DfE ITT census (2015/16 - 2023/24)



Source: DfE ITT census (2023/24)

Teachers leaving or considering leaving teaching – trends over time

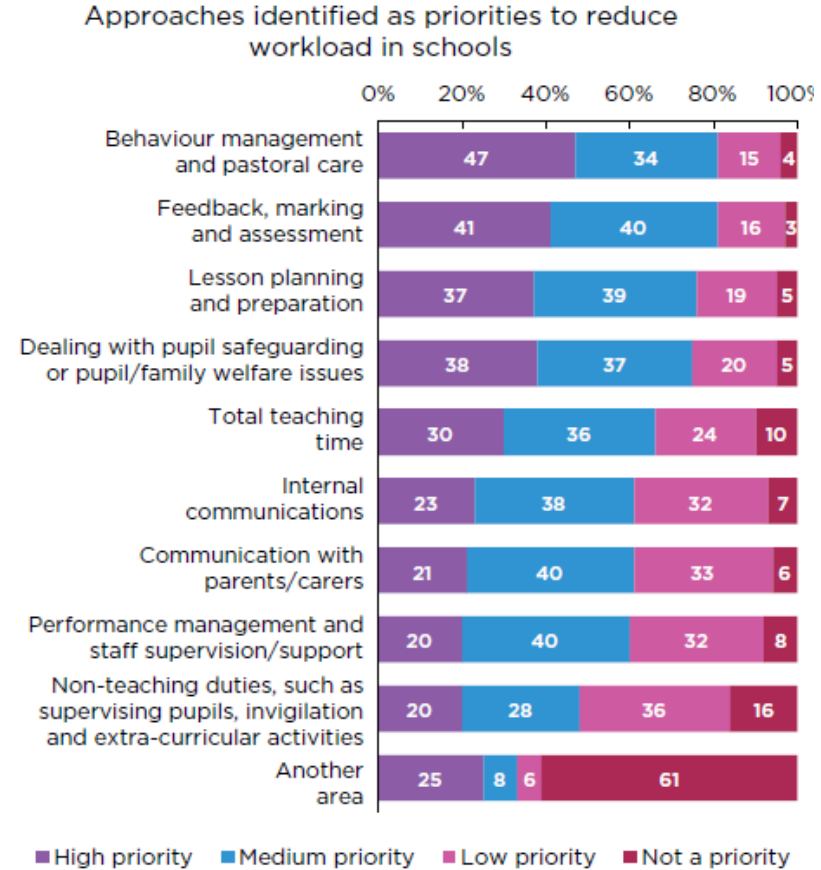
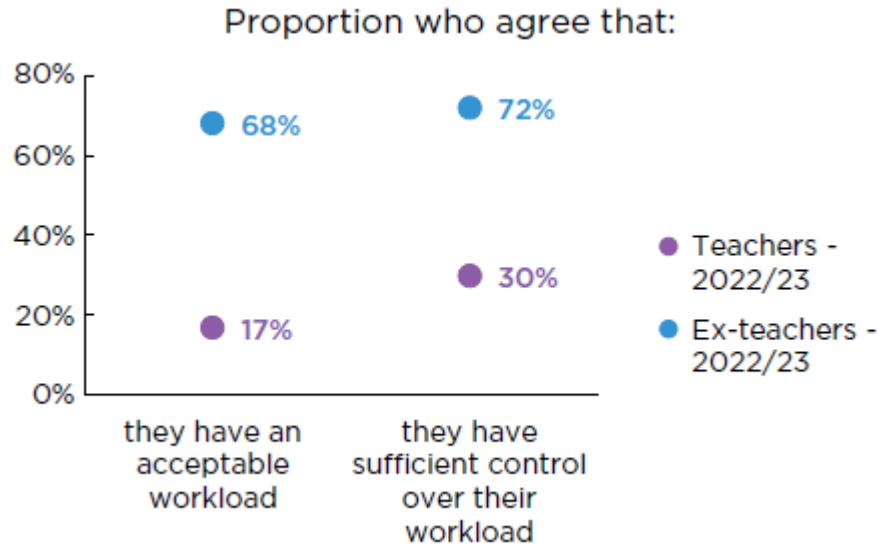
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Source: Working Lives of Teachers and Leaders (waves 1 and 2)

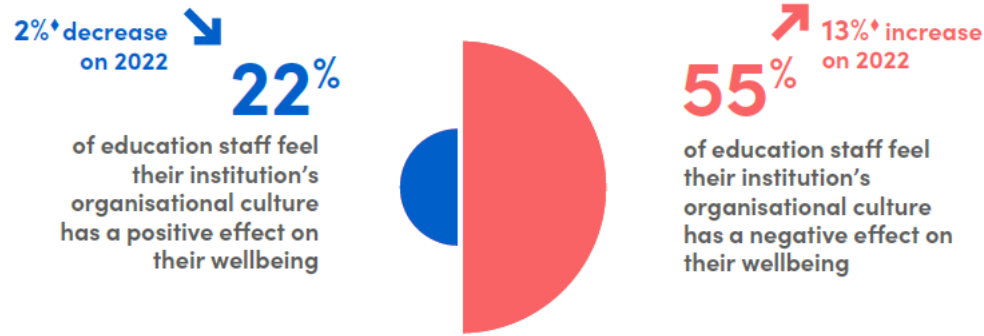
Teacher workloads and strategies to reduce

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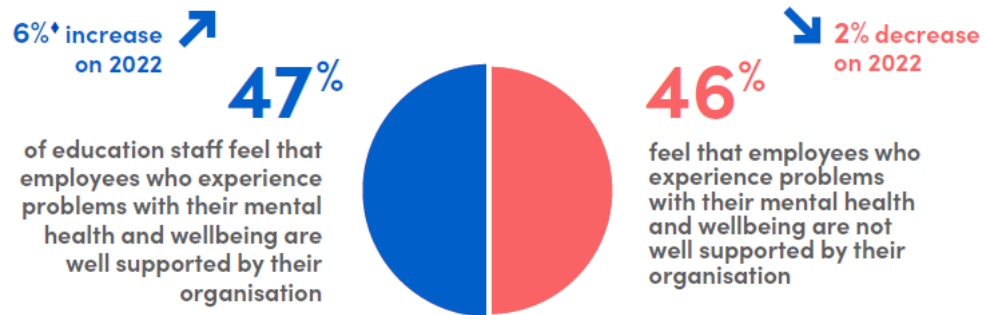
Source: Martin *et al.* (2023)

Mental health of education staff

There is a large increase in the number of school teachers and senior leaders reporting their organisational culture has a negative effect on their wellbeing.



We asked staff how well they thought their organisation supports employees who experience problems with mental health and wellbeing.



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Equity in Education: No Learner Left Behind

Surrey's Lifetime of Learning Strategy

Vision and Context

Our Vision is to achieve the best education for all children, young people and adults whatever their background, challenge or need so they belong and thrive.

In line with the Community Vision for Surrey by 2030, we want Surrey to be a uniquely special place where all children have a great start to life, and everyone receives education that allows them to achieve their full potential to become contributors to their communities throughout their life.

One of our young people told us:

'Education means everything to me, it's part of life that you will always need, and it opens up more opportunities for you in the future, and knowing that you will be living comfortably in your dream job, dream house, all because you stuck to education is amazing'
(Surrey young person aged 18 years).

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Surrey has a diverse and vibrant education landscape and has outcomes at each key stage above the national average. Whilst most of the children, young people and adults in Surrey achieve, thrive, belong and live well, this is not the case for everyone.

In Surrey, many children from disadvantaged homes often start school behind their peers, and this gap persists through school and into further and higher education. In many instances outcomes are weaker than similar learners in England.

In some areas of Surrey adults are less able to secure economic well-being because of skills and qualification gaps. We are aware that attendance is a significant factor in achieving the best outcomes, and that in Surrey exclusion from school and poor attendance is too high.

This strategy aims to ensure that we mitigate and remove barriers to enable us to close the gaps in terms of outcomes, exclusions and attendance. It will also ensure that Surrey adults can access learning opportunities, in high quality provision, that develop new skills or secures new qualifications to help them succeed at any time they need to.

Through initial work with early years, schools and college leaders' working groups, we have identified five key objectives that we want to achieve as a result of this Strategy.



We aspire to have an education vision, strategy and action plan that allows us to ensure that:

- everyone benefits from the right education, skills and employment opportunities that help them succeed in life at the time they need it
- we overcome inequalities, ensuring that no one is left behind and we strive to increase equity for all
- reduces and removes barriers to education and participation
- whatever their background, belief or culture our children, young people and adults, are respected, feel that they are treated fairly and are valued in Surrey.
- brings together collaborative partners and stakeholders to work together to improve outcomes for children, young people and adults.
- considers the aspirations and needs of an increasingly ethnically diverse population.

We will achieve this by working together as a partnership across all phases of learning from early years to adulthood.

Coproduction

The approach to a co-produced Lifetime of Learning Strategy for Surrey is new. The shift in the national education landscape with greater autonomy for education settings requires a different collaborative approach to setting out our ambition for learners. This strategy provides an opportunity to highlight what we will focus on to reduce the inequity in Surrey.

We want our education leaders to understand the whole system and to collaborate and support each other in taking the responsibility for the changes that we need to make. Partnership and shared accountability for all our learners will ensure we deliver this ambitious Lifetime of Learning Strategy.

The principles that will shape how we work together are:

- We will bring together leaders from all Surrey settings, schools, colleges and other learning providers and partners to improve attainment and opportunities for all.
- We will take shared accountability for improving standards and the educational outcomes and life chances of all residents.
- We will promote a culture of openness, trust, partnership and collaboration that improves outcomes, shares best practice and contributes to system led improvement.



- We will ensure no education or learning settings are left isolated.
- We will put the interests of residents first at all times.
- We will ensure no child should fail to reach their educational potential because of disadvantage or vulnerability.
- We will ensure that adults have opportunities to acquire new skills and knowledge when they need them.
- We will ensure all our joint actions add value, are evidence based and as far as possible are proactive rather than a response to a crisis.

We will work together to ensure that:

- All children and young people are seen and heard, feel safe and can grow.
- We use a whole family approach to ensure families get the help and support they need from different professionals working as one team.
- Adults and those who are over school age, have access to education at times in their life when they need it.
- We ensure that the services we offer considers the accessibility to those who have poor health.
- Our work helps to close the employment gap for disabled residents and for residents from some ethnic backgrounds.

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This strategy will sit alongside other key strategies that support our broader ambitions for children, young people and adult residents in Surrey.

- Surrey Community Vision for 2030
- Surrey Skills Plan 2022
- Surrey Inclusion and Additional Needs Strategy
- Surrey All Age Autism Strategy
- Best Start to Life Strategy
- Surrey Health and Wellbeing Strategy
- Children and Young Peoples Emotional Wellbeing and Mental Health Strategy

This Education and Lifelong Learning Strategy has been developed in consultation with key stakeholders: phase councils; further education and skills providers; the local area Special Educational Needs and Disabilities (SEND) partnership board; Surrey's Health and Wellbeing Board; Schools Alliance for Excellence and wider Council services.

We are now able to learn more about what our children and young people, parents and carers and community groups want from this strategy, and this will be an area we will focus on over the coming months.



Connecting the Lifetime of Learning

We will take a holistic view of a learner's journey from early years, through school and post 16 learning into adulthood. We believe the phases of learning are connected and we know that the transition points in learning can impact on a learner emotionally, socially and economically.

Foundations for Life

We want every child to access high quality early education that secures physical, verbal, cognitive & emotional development, and establishes positive attitudes to school and learning. Early identification of need and planning for the future ensures that all children have access to the right advice and support including during the crucial first 1001 days. The outcome gap between children growing up in disadvantage and poverty in Surrey and the national average will be narrowed.

Thriving in learning

We feel that all our schools should be ambitious and inclusive providing curricula that are, inspiring, creative and broaden horizons. All young people will leave school having secured the skills, knowledge, curiosity and confidence to achieve their goals. Children and young people's needs are identified and met and through a relentless focus on inclusion and equity, we will improve the learning and outcomes of children and young people from disadvantaged and vulnerable groups so there is no gap between them and national averages.

Flourishing Young Adults

We aspire to have all young people moving into adulthood as confident lifelong learners, progressing towards fulfilling lives in work, training or education contributing to a thriving economy. Exceptional personal development provision enables young people to contribute positively to society. In their October 2023 survey 24% of Surrey Youth Voice respondents said that self-improvement was important to them. This included the learning of new skills, developing communication and finding appropriate work experience.

Engagement with all young people and re-engagement with those who have dropped out of work and/or learning means that the number of people not in education, employment or training lower than the national figure.



For economic growth and personal well-being

We want all adults in Surrey to be able to access and engage with learning to achieve their ambitions and potential. The adult education curriculum continues to be agile and ambitious, improving social inclusion, mental well-being and confidence. Adult learning provision is inclusive & accessible to adults who are disadvantaged, vulnerable and least likely to participate in education.



Our Priorities for 2024 - 2026

Our priority for this strategy is to improve educational outcomes for under-served groups.

We will do this by:

1. Improving communication, language and literacy across all ages and phases for all groups.

What is our challenge?

Communication, language and literacy have significant impact on achievement and progress throughout all phases of education and beyond. Whilst we do well for most, many of our vulnerable children, young people and adults continue to struggle to achieve the key skills of reading, writing and oracy needed to succeed in education and life.

What do we want to achieve?

Foundations for life

- Effective provision enables children to develop strong spoken language skills

Thriving in learning

- The continued development of the teaching of reading, including a focus on the importance of the robust teaching of phonics and early reading skills leads to improved outcomes at primary particularly for those children identified as disadvantaged
- Improving literacy at transition points for every phase of learning
- Developing reading and disciplinary literacy at secondary school

Flourishing young adults

- Ensuring improving literacy and communication is embedded in all aspects of post-16 provision including secure and successful intervention programmes for those in need

For economic growth and personal well-being

- Adult learning provision is accessible to the needs of those who are disadvantaged, vulnerable and least likely to participate in education



2. Understanding and addressing issues that result in low and non-attendance and engagement in education settings.

What is our challenge?

Regular attendance and engagement are an important part of giving children and young people the best possible start in life, enabling them to make a significant positive contribution to society. Missing learning means they are less likely to make the best academic progress. Poor attendance and engagement can also lead to social isolation and low self-esteem.

What do we want to achieve?

Foundations for life

- Early years professionals and settings actively involving parents in supporting their children's learning and development

Thriving in learning

- Improvement in the attendance of children and learners particularly those that are vulnerable through working in partnership

Flourishing young adults

- The number of young people and adults is lower than the national figure. in particular for those with SEND through re-engagement with vulnerable young people who have dropped out of work and / or learning

For economic growth and personal well-being

- All adults in Surrey can re-engage with learning to achieve their ambitions and potential

3. Ensuring education settings have the skills, confidence and understanding to support children, young people and adult emotional wellbeing to enable them to thrive and learn.

What is our challenge?

In the wake of the pandemic and the challenges of our current society the physical and mental health of our children, young people and adults is more challenged than ever.

To make real impact in this area of work, health and well-being needs to be built into the ethos, curriculum and practices of our early years, school, college and post-16 life.



What do we want to achieve?

Foundations for life

- Families are empowered to have the best emotional wellbeing, physical health and mental health
- Practitioners have a common understanding of how to promote families living healthy, fulfilling lives with good emotional wellbeing
- Families who have communication difficulties or needs are given a voice to communicate health, wellbeing and relationship concerns in a way of their choice
- All professionals in the early years have a strong understanding of trauma and trauma informed practice

Thriving in learning

- Joint working between health and education improves health and well-being of learners in particular mental health.
- Pupils in most need have access to mental and healthy lifestyle improvement programmes including targeted interventions
- Relational practice is at the heart of our schools' behavioural practices

Flourishing young adults

- Access to exceptional personal development so that young people can make a positive contribution to society

For economic growth and personal well-being

- In line with Surrey's Health and Wellbeing Strategy, we want to prevent poor mental health and supporting those with mental health needs to have access to early, appropriate support to prevent further escalation of need. We support the ambition to create communities and social environments that tackle isolation and build good mental health

4. Recruiting, retaining and growing the best teachers, practitioners and leaders. Providing them with high quality continuing professional development opportunities through their careers.

What is our challenge?

We will not achieve our ambitions without ensuring we have sufficient education practitioners and experts across all phases and ensuring deep and long-term support to improve the quality of leadership and teaching. Early years professionals, teachers and learning providers are our most



precious resource. We know too that support staff play a key part in helping our education system thrive.

What do we want to achieve?

Knowledgeable and skilled leaders, teachers, practitioners, learning providers and support staff who love working and learning in Surrey.

Surrey Education Partnership (SEP)

Over the last 18 months, we have brought together learning providers and other groups from across Surrey to support the development and implementation of the Lifetime of Learning Strategy. The partners included schools, colleges, early years, higher education, skills, adult learning settings along with Surrey County Council, Schools Alliance for Excellence, the Department for Education, members of the Surrey Health and Wellbeing Board and the Dioceses.

10 The SEP has appointed an independent chairperson, and the chairperson will support partners to work together to champion the ambitions of the strategy. Working collectively, we are committed to building a connected education system that is better for all where equity and excellence are not divided.

The SEP aims to share good practice both within and between sectors, challenging providers to keep Equity in Education at the heart of what they do and focus on the impact of our work for underserved learners.

The SEP will build on a strong platform of collaborative working in the county supporting partners across the education, health and the business community and between phases and stages to deliver the Strategy. It will monitor the impact of the work and will evaluate progress highlighting areas where targeted support might be required.



SURREY COUNTY COUNCIL**CABINET**

DATE: 26 NOVEMBER 2024

REPORT OF CABINET MEMBER: CLARE CURRAN, CABINET MEMBER FOR CHILDREN, FAMILIES AND LIFELONG LEARNING

LEAD OFFICER: JULIA KATHERINE, DIRECTOR OF EDUCATION AND LIFELONG LEARNING

SUBJECT: COORDINATED ADMISSIONS SCHEME FOR SEPTEMBER 2026

ORGANISATION STRATEGY PRIORITY AREA: NO ONE LEFT BEHIND

Purpose of the Report:

The purpose of this report is to ensure Surrey determines and publishes its coordinated admissions scheme for 2026 in accordance with the requirements of the School Admissions (Admission Arrangements and Coordination of Admission Arrangements) (England) Regulations and the School Admissions Code.

Each year, Surrey County Council is responsible for processing approximately 30,000 applications for a school place from Surrey residents and coordinates offers for over 350 schools. This piece of work helps Surrey County Council meet its organisational strategy objective of 'No One Left Behind' by ensuring, as far as possible, that multiple offers are eliminated, thus freeing up a place to be offered to every child who needs one.

Recommendations:

1. It is recommended that Cabinet make the following recommendation to the County Council:

Recommendation

That the coordinated admissions scheme that will apply to all applicants and schools for 2026 is agreed as set out in Annex 1.

Reason for Recommendations:

- The coordinated admissions scheme for 2026 is essentially the same as 2025 with dates updated
- There are several changes that have been made to the primary and secondary schemes as points of clarification (see paragraph 9), but these do not alter current practice

- The coordinated admissions scheme will enable the County Council to meet its statutory duties regarding school admissions
- The coordinated admissions scheme is working well
- The Local Authority has a statutory duty to publish its coordinated admissions scheme for 2026 by 1 January 2025
- The proposed scheme meets the statutory requirements of the School Admissions (Admission Arrangements and Coordination of Admission Arrangements) (England) Regulations 2012 and the School Admissions Code

Executive Summary:

1. The School Admissions (Admission Arrangements and Coordination of Admission Arrangements) (England) Regulations 2012 set out the requirements for the coordinated admissions scheme and require each local authority to formulate a scheme by 1 January each year.
2. The School Admissions Code also requires local authorities to publish their scheme by 1 January each year.
3. Coordinated admissions schemes describe the process by which each local authority will coordinate the applications for school places for their residents and for their schools, to ensure, as far as possible, each child only receives one offer of a school place.
4. The coordinated admissions scheme sets out the timetable for application, the dates that the local authority will exchange information about school preferences and outcomes with other admission authorities (including schools and other local authorities) and when they will make offers of places for schools in their area.
5. Due to the number of cross border applications and offers, Surrey participates in the Pan London Admissions scheme whereby dates and the process for data exchange are coordinated with London LAs and other LAs bordering London.
6. The coordinated admission scheme in Surrey is working well with all schools participating, as they are legally required to.
7. The coordinated scheme proposed for 2026 complies with the statutory requirements for a scheme. It provides for all preferences to be named on one application form and for applications to be coordinated to ensure that, as far as possible, each child only receives one offer of a school place on the primary and secondary national offer days.
8. Dates within the coordinated admissions scheme for 2026 have been updated to ensure they comply with the Pan London timetable.
9. The only other changes are points of clarification, as follows, but these changes do not alter current practice:
 - in paragraph 4 of the primary and secondary scheme (pages 3 and 9 of Annex 1) a clarification has been added to confirm that it is only where the same parent completes more than one application that the application with the

latest date will be accepted. This makes a distinction between cases where two parents make separate applications

- in the secondary scheme, paragraph 7 (page 10 of Annex 1) has been added to bring it into line with the primary scheme. This paragraph makes clear that schools should send any paper forms they may receive to Surrey admissions
- in paragraphs 13, 22, 33, 39, 40 and 41 of the primary and secondary schemes (pages 4, 5, 6, 7, 10, 11, 12 and 13 of Annex 1) clarification has been added to confirm that information will be 'shared' with each admission authority rather than 'sent', to reflect that preferences are now shared with schools online
- in paragraph 23 of the primary and secondary schemes (pages 5 and 11 of Annex 1) reference to sending a letter by first class post has been removed as all the vast majority of outcomes are now shared online or by email. This does not preclude the team sending an outcome by letter where a parent has not applied online and does not have an email address
- in paragraph 30 of the primary and secondary scheme (pages 6 and 12 of Annex 1) clarification has been added about the need for evidence to have been provided by the deadline date in order for an application to be considered as on time

Consultation:

10. Regulations require consultation to take place where:
 - the qualifying scheme is substantially different from the qualifying scheme adopted for the preceding academic year, or
 - the local authority has not consulted on a qualifying scheme adopted in the previous seven years
11. The Local Authority last consulted on its coordinated admissions scheme for 2022 and so the seven-year threshold has not been met for consultation. In addition, the coordinated admissions scheme that has been proposed for 2026 is essentially the same as for 2025, with only dates updated and minor points of clarification added, so there are no significant changes. As such, no consultation has been undertaken on the scheme for 2026.

Risk Management and Implications:

12. The risks of implementing the coordinated admissions scheme is very low, with a greater risk if the scheme is not agreed.

Financial and Value for Money Implications:

13. The coordinated admissions scheme ensures processes can be streamlined and thus carried out within the available budget envelope.

Section 151 Officer Commentary:

14. The Council continues to operate in a very challenging financial environment. Local authorities across the country are experiencing significant budgetary pressures. Surrey County Council has made significant progress in recent years to improve the Council's financial resilience and whilst this has built a stronger

financial base from which to deliver our services, the cost of service delivery, increasing demand, financial uncertainty and government policy changes mean we continue to face challenges to our financial position. This requires an increased focus on financial management to protect service delivery, a continuation of the need to deliver financial efficiencies and reduce spending in order to achieve a balanced budget position each year.

15. In addition to these immediate challenges, the medium-term financial outlook beyond 2024/25 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 the stable provision of services in the medium term.
16. As such, the Section 151 Officer supports the continuation of the coordinated admissions scheme to meet statutory obligations.

Legal Implications – Monitoring Officer:

17. The coordinated admission scheme complies with the requirements of the School Admissions (Admission Arrangements and Co-ordination of Admission Arrangements) (England) Regulations 2012 as amended and the School Admissions Code.

Equalities and Diversity:

18. The Equalities Impact Assessment has been completed in full and is attached in Annex 2. The adoption of a coordinated admission scheme is a statutory requirement. The coordinated admissions scheme does not discriminate according to age, gender, ethnicity, faith, disability or sexual orientation.

Other Implications:

19. 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	Set out below
Environmental sustainability	No significant implications arising from this report
Compliance against net-zero emissions target and future climate compatibility/resilience	No significant implications arising from this report
Public Health	No significant implications arising from this report

Safeguarding responsibilities for vulnerable children and adults implications:

20. The efficient and timely administration of the school admission process, as set out in the coordinated admissions scheme, coupled with the equitable distribution of school places in accordance with the School Admission Code and parental preference, contribute to the County Council's priority for safeguarding vulnerable children.

What Happens Next:

21. The coordinated admissions scheme will be ratified by the full County Council on 10 December 2024.
22. The scheme will then be published on Surrey's website by 1 January 2025 and all Surrey schools will be notified.

Report Author:

Claire Potier: Service Manager School Admissions - claire.potier@surreycc.gov.uk

Consulted:

- Trudy Pyatt, Assistant Director Education, Access, Quality and Inclusion
- Amanda Scally - Principal Solicitor – Adults, Education, Litigation & Employment
- Nikki Parsons - Deputy Strategic Finance Business Partner – Education & Lifelong Learning

Annexes:

Annex 1 Coordinated admissions scheme
Annex 2 Equality Impact Assessment

Sources/background papers:

- School Admissions (Admission Arrangements and Coordination of Admission Arrangements) (England) Regulations 2012
 - School Standards and Framework Act 1998
 - Education Act 2002
 - School Admissions Code 2021
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Coordinated Scheme 2026/2027

**for admission to primary and secondary
school**

Coordinated scheme for admission to primary and secondary school for 2026/27

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Coordinated scheme for admission to primary school (Reception and Year 3) for 2026/27

Applications

1. Surrey's admissions team will distribute information leaflets on admissions early in September 2025. These will be available in all Surrey primary schools. The leaflet will refer parents to the Surrey County Council website www.surreycc.gov.uk/admissions via which parents will be able to access the admissions information and apply online from 3 November 2025. Alternatively, they can obtain a primary school admissions booklet and a paper preference form by ringing the Surrey Schools and Childcare Service on 0300 200 1004.
2. All parents living in Surrey must only complete Surrey's online application form or a Surrey paper form which will be available from 3 November 2025. Parents living outside Surrey must use their home local authority's form to apply for a place at a Surrey school. Parents living in Surrey can apply for a school in another local authority on Surrey's online or paper form. Along with all other local authorities, Surrey operates an equal preference system. Surrey's application form invites parents to express a preference for up to four maintained primary schools or academies (including free schools) within and/or outside of Surrey. This enables Surrey County Council to offer a place at the highest possible ranked school for which the applicant meets the admission criteria.
3. In accordance with the School Admissions Code, the order of preference given on the application form will not be revealed to a school within the area of Surrey, unless a parent exercises their right to appeal and a copy of the application is requested by the school to help them demonstrate that the admission arrangements have been correctly and impartially applied. However, where a parent resident in Surrey expresses a preference for a school in the area of another local authority, the order of preference for that local authority's school will be revealed to that local authority in order that it can determine the highest ranked preference in cases where a child is eligible for a place at more than one school in that local authority's area.
4. The closing date for all applications (either online or paper) will be 15 January 2026. Changes to ranked preferences and applications received after the closing date will not be accepted unless they are covered by paragraphs in this scheme which relate to late applications and changes of preference. If **the same** parent completes more than one application stating different school preferences, Surrey's admissions team will accept the form submitted on the latest date before the closing date. If the date is the same, Surrey's admissions team will contact the parent to ask them to confirm their ranked preferences.
5. Schools that are their own admission authority must not use any other application form but may use a supplementary form if they need to request additional information that is required to apply their admission criteria. Surrey County Council's website and Surrey's primary school admissions booklet will indicate which schools require a supplementary form. Supplementary forms can be accessed via the website or can be obtained from each school. All supplementary forms should be returned to the school by the date specified by the school but, in any case, no later than the national closing date of 15 January 2026. The supplementary form should clearly indicate where it is to be returned. Where supplementary forms are used by admission authorities within Surrey, the admissions team will seek to ensure that these only collect information which is required by the published oversubscription criteria, in accordance with the School Admissions Code.

6. Where a school in Surrey receives a supplementary form, Surrey's admissions team will not consider it to be a valid application unless the parent/carer has also listed the school on their home local authority's application form.
7. Any paper application forms handed in to schools should be sent to Surrey's admissions team immediately.
8. Surrey's admissions team will confirm the status of any resident child for whom it receives an application stating s/he is a looked after or previously looked after child and will provide evidence to the maintaining local authority in respect of a preference for a school in its area by 5 February 2026.
9. Surrey's admissions team will advise a maintaining local authority of the reason for any preference expressed for a school not in its area and will forward any supporting documentation to the maintaining local authority by 5 February 2026.
10. Surrey's admissions team will advise a maintaining local authority of the reason for any application made in respect of a child resident in Surrey to be admitted outside of their correct age cohort and will forward any supporting documentation to the maintaining local authority by 5 February 2026.
11. Surrey County Council participates in the Pan London Coordinated Admission Scheme. Surrey's admissions team will upload application data relating to preferences for schools in other participating local authorities, which have been expressed within the terms of Surrey's scheme, to the Pan London Register by 5 February 2026. Alternative arrangements will be made to forward applications and supporting information to non-participating local authorities.
12. Surrey County Council will participate in the Pan London application data checking exercise scheduled between 16 and 23 February 2026.

Processing

13. By 5 February 2026, Surrey's admissions team will have assessed the level of preferences for each school and will **share a list with each** admission authority school so that they can apply their admission criteria.
14. By 2 March 2026 all schools which are their own admission authority will have applied their admission criteria and will provide Surrey's admissions team with a list of all applicants in rank order. This will enable Surrey to offer places to ensure that under the terms of the coordinated scheme each applicant is offered the highest possible ranked preference. Surrey County Council will expect schools to adhere to their published admission number unless there are exceptional circumstances such as if this would not enable Surrey to fulfil its statutory duty where the demand for places exceeds the number of places available.
15. Surrey's admissions team will carry out all reasonable checks to ensure that pupil rankings are correct for all schools in Surrey before uploading data to the Pan London Register.
16. Between 19 March and 23 March 2026 for Junior and between 19 March and 25 March for Reception, Surrey's admissions team will send and receive electronic files with all coordinating local authorities, in order to achieve a single offer. Where a management decision is made that additional iterations are necessary, these will continue no later than 25 March 2026 for Junior and 27 March 2026 for Reception.

Offers

17. Surrey's admissions team will identify the school place to be offered and communicate information as necessary to other local authorities by 27 March 2026. In instances where more than one school could make an offer of a place to a child, Surrey's admissions team will offer a place at the school which the parent had ranked highest on the application form. Where Surrey is unable to offer a place at any of the preferred schools the admissions team will offer a place at an alternative community or voluntary controlled school with places or by arrangement with an academy or foundation, free, trust or voluntary aided school with places.
18. Surrey's admissions team will not make an additional offer between the end of the iterative process and 16 April 2026 which may impact on an offer being made by another participating local authority.
19. Notwithstanding paragraph 18, if an error is identified within the allocation of places at a Surrey school, the admissions team will attempt to manually resolve the allocation to correct the error. Where this impacts on another local authority (either as a home or maintaining local authority) Surrey's admissions team will liaise with that local authority to attempt to resolve the correct offer and any multiple offers which might occur. However, if another local authority is unable to resolve a multiple offer, or if the impact is too far reaching, Surrey's admissions team will accept that the applicant(s) affected might receive a multiple offer.
20. Surrey's admissions team will participate in the Pan London offer data checking exercise scheduled between 26 March and 8 April 2026.
21. Surrey's admissions team will send a file to the E-Admissions portal with outcomes for all resident applicants who have applied online no later than 13 April 2026.
22. By 16 April 2026 a list of children being allocated places will be **shared with each** primary school for their information.
23. On 16 April 2026 an outcome will be sent by Surrey's admissions team to all parents who have completed a Surrey application form. ~~Where a first preference has not been met a letter will be sent by first class post which will refer parents to Surrey's website or the contact centre for further advice.~~ Parents will be asked to confirm whether or not they wish to accept any school place offered. **Under no circumstances must any school write to or make any other contact with parents to make an offer of a place or take any action to inform them that a place will or will not be offered before 16 April 2026.**

Late Applications and changes of preference

24. It is recognised that applications will be received after the closing date and that some parents will wish to change their preferences e.g. if a family is new to the area or has moved house. Such applications must still be dealt with and this section deals with applications received in these circumstances.

Applications and changes of preference received after the closing date but before 16 April 2026

25. Some late applications will be treated as late for good reason. These will generally relate to applications from families who are new to the area where it could not reasonably have been expected that an application could have been made by the closing date. Applicants must be able to provide recent proof of ownership or tenancy of a Surrey property (completion or

signed tenancy agreement). Other cases might relate to a single parent family where the parent has been ill or where there has been a recent bereavement of a close relative. These cases will be considered individually on their merits.

26. The latest date that an application from a Surrey resident can be accepted as late for good reason is 12 February 2026. If an application is deemed late for good reason and all supporting information is received by this date it will be passed to any admission authority named for consideration, alongside all applications received on time.
27. Where applications which have been accepted as late for good reason contain preferences for schools in other local authorities, the admissions team will forward the details to maintaining local authorities as they are received.
28. The latest date for the upload to the Pan London Register of late applications from Surrey residents which are considered to be on time is 13 February 2026.
29. Where an applicant lives out of county, Surrey will accept late applications which are considered to be on time within the terms of the home local authority's scheme up to 13 February 2026.
30. Where an applicant moves from one home local authority to Surrey after submitting an on time application under the terms of the former home local authority's scheme, Surrey will accept the application as on time up to 12 February 2026, on the basis that an on time application already exists within the system, **but only if all evidence is received by this date**. Applicants moving to or from non-participating Pan London local authorities will be managed on a case by case basis.
31. Late applications from parents where it could reasonably have been expected that an application could have been made by the closing date and those received after 12 February 2026 will be considered as late. These applications will not be processed until after all on time applications have been considered.
32. Some parents may wish to change a preference after the closing date due to a change of circumstances. Surrey's admissions team will accept changes to preferences after the closing date only where there is good reason, such as a house move or other significant change of circumstance, which makes the original preference no longer practical. Any such request for a change of preference must be supported by documentary evidence and must be received by 12 February 2026. Any changes of preference received after 12 February 2026 will not be considered until all on time applications have been dealt with.

Applications and changes of preference received between 16 April 2026 and 31 August 2026

33. Applications will continue to be received after 16 April 2026. Only those preferences expressed on the application form will be valid. Where the school is its own admission authority the application data will be **shared with** them requesting an outcome for the preference within 14 days. Once the outcome is known for each preference Surrey's admissions team will issue the outcome letter to the parent.
34. Where the stated preference is for a school in a neighbouring authority the application form will be passed to that authority requesting an outcome for the preference within 14 days. Once the outcome is known for each preference Surrey's admissions team will issue the outcome letter to the parent.

35. After 16 April 2026 some parents may wish to change a preference or order of preference due to a change of circumstances. Surrey's admissions team will accept changes to preferences or order of preferences after 16 April 2026. Parents may also name additional preferences after the offer day of 16 April 2026.
36. The coordination scheme will end on 31 August 2026. Applications received after 31 August 2026 will be considered in line with Surrey's in year admissions procedures.

Post Offer

37. Surrey's admissions team will request that resident applicants accept or decline the offer of a place by 30 April 2026, or within two weeks of the date of any subsequent offer.
38. If they do not respond by this date Surrey's admissions team will issue a reminder. If the parent still does not respond the admissions team or the school, where it is its own admission authority, will make every reasonable effort to contact the parent to find out whether or not they wish to accept the place. Only where the parent fails to respond and the admissions team or school, where it is its own admission authority, can demonstrate that every reasonable effort has been made to contact the parent, will the offer of a place be withdrawn.
39. Where an applicant resident in Surrey accepts or declines a place in a Surrey school by 30 April 2026, Surrey's admissions team will **share this** information with the school by 7 May 2026.
40. Where an applicant resident in Surrey accepts or declines a place in a school maintained by another local authority by 30 April 2026, Surrey's admissions team will **share this** information **with** the maintaining local authority by 7 May 2026. Where such information is received from applicants after 30 April 2026, Surrey's admissions team will **share it with** the maintaining local authority as it is received.
41. Where an acceptance or decline is received for a Surrey school in respect of an applicant resident outside Surrey, Surrey's admissions team will **share** the information **with** the school as it is received.
42. When acting as a maintaining local authority, Surrey will inform the home local authority, where different, of an offer that can be made for a maintained school or academy (including a free school) in Surrey, in order that the home local authority can offer the place.
43. When acting as a maintaining local authority, Surrey and the admission authorities within it will not inform an applicant resident in another local authority that a place can be offered.
44. When acting as a home local authority, Surrey will offer a place at a maintained school or academy (including a free school) in the area of another local authority, provided that the school is ranked higher on the application form than any school already offered.
45. When acting as a home local authority, when Surrey is informed by a maintaining local authority of an offer which can be made to an applicant resident in Surrey which is ranked lower on the application form than any school already offered, it will inform the maintaining local authority that the offer will not be made.
46. When acting as a home local authority, when Surrey has agreed to a change of preferences or preference order, it will inform any maintaining local authority affected by the change.

47. When acting as a maintaining local authority, Surrey will inform the home local authority, where different, of any change to an applicant's offer status as soon as it occurs.
48. When acting as a maintaining local authority, Surrey will accept new applications (including additional preferences or preference order changes) from home local authorities for maintained schools and academies (including free schools) in its area.

Waiting Lists

49. Where a child does not receive an offer of their first preference school, their name will be placed on the waiting list for each school in Surrey that is named as a higher preference school to the one they have been offered, in accordance with the policy of each admission authority. Parents will be advised that if they want to go on the waiting list for an out of county preference school that they should contact the school or the maintaining local authority for the school to establish their policy on waiting lists.
50. Details of pupils who have not been offered a higher preference school will be shared with the admission authority for each Surrey school by 16 April 2026.
51. Each admission authority will operate waiting lists so that it is clear which child will be eligible for the next offer of a place should a vacancy arise. The waiting list order will be determined by the admission criteria of the school. However, all offers must be made by the home local authority. Admission authorities are encouraged to share waiting list information confidentially with other local schools to support effective planning of school places.
52. Schools within Surrey will not inform any applicant that a place can be offered in advance of such notification being sent by the home local authority.
53. Waiting lists for each school will be held until at least the end of the Autumn term after which some schools may cancel their waiting lists. Details of how waiting lists for each school will be managed will be set out in the admission arrangements that apply to each school.

Coordinated scheme for admission to secondary school (Year 7 and Year 10) for 2026/27

Applications

1. Surrey's admissions team will distribute information leaflets on admissions early in September 2025. These will be distributed to all children in Year 6 in Surrey maintained schools who are resident in Surrey. The leaflet will refer parents to the Surrey County Council website www.surreycc.gov.uk/admissions via which parents will be able to access the admissions information and apply online from 1 September 2025. Alternatively, they can obtain a secondary school admissions booklet and a paper preference form by ringing the Surrey Schools and Childcare Service on 0300 200 1004.
2. All parents living in Surrey must only complete Surrey's online application form or a Surrey paper form which will be available from 1 September 2025. Parents living outside Surrey must use their home local authority's form to apply for a place at a Surrey school. Parents living in Surrey can apply for a school in another local authority on Surrey's online or paper form. Along with all other local authorities, Surrey operates an equal preference system. Surrey's application form for Year 7 invites parents to express a preference for up to six maintained secondary schools or academies (including free schools) within and/or outside of Surrey (and any city technology college that has agreed to participate in their local authority's qualifying scheme). Surrey's application form for Year 10 invites parents to express a preference for up to three university technical colleges or studio schools. These enable Surrey County Council to offer a place at the highest possible ranked school for which the applicant meets the admission criteria.
3. In accordance with the School Admissions Code, the order of preference given on the application form will not be revealed to a school within the area of Surrey, unless a parent exercises their right to appeal and a copy of the application is requested by the school to help them demonstrate that the admission arrangements have been correctly and impartially applied. However, where a parent resident in Surrey expresses a preference for a school in the area of another local authority, the order of preference for that local authority's school will be revealed to that local authority in order that it can determine the highest ranked preference in cases where a child is eligible for a place at more than one school in that local authority's area.
4. The closing date for all applications (either online or paper) will be 31 October 2025. Changes to ranked preferences and applications received after the closing date will not be accepted unless they are covered by the paragraphs in this scheme which relate to late applications and changes of preference. If **the same** parent completes more than one application stating different school preferences, Surrey's admissions team will accept the form submitted on the latest date before the closing date. If the date is the same, Surrey's admissions team will contact the parent to ask them to confirm their ranked preferences.
5. Schools that are their own admission authority must not use any other application form but may use a supplementary form if they need to request additional information that is required to apply their admission criteria. Surrey County Council's website and the secondary school admissions booklet will indicate which schools require a supplementary form. Supplementary forms can be accessed via the website or can be obtained from each school. All supplementary forms should be returned to the school by the date specified by the school but, in any case, no later than the national closing date of 31 October 2025. The supplementary form should clearly indicate where it is to be returned. Where supplementary

forms are used by admission authorities within Surrey, the admissions team will seek to ensure that these only collect additional information which is required by the published oversubscription criteria in accordance with the School Admissions Code.

6. Where a school in Surrey receives a supplementary form, Surrey's admissions team will not consider it to be a valid application unless the parent/carer has also listed the school on their home local authority's application form.
7. **Any paper application forms handed in to schools should be sent to Surrey's admissions team immediately.**
8. Surrey's admissions team will confirm the status of any resident child for whom it receives an application stating s/he is a looked after or previously looked after child and will provide evidence to the maintaining local authority in respect of a preference for a school in its area by 14 November 2025.
9. Surrey's admissions team will advise a maintaining local authority of the reason for any preference expressed for a school not in its area and will forward any supporting documentation to the maintaining local authority by 14 November 2025.
10. Surrey's admissions team will advise a maintaining local authority of the reason for any application made in respect of a child resident in Surrey to be admitted outside of their correct age cohort and will forward any supporting documentation to the maintaining local authority by 14 November 2025.
11. Surrey County Council participates in the Pan London Coordinated Admission Scheme. Surrey's admissions team will upload application data relating to preferences for schools in other participating local authorities, which have been expressed within the terms of Surrey's scheme, to the Pan London Register by 14 November 2025. Alternative arrangements will be made to forward applications and supporting information to non-participating local authorities.
12. Surrey County Council will participate in the Pan London application data checking exercise scheduled between 15 December 2025 and 2 January 2026.

Processing

13. By 28 November 2025, Surrey's admissions team will have assessed the level of preferences for each school and will **share** a list **with each** admission authority school so that they can apply their admission criteria.
14. By 9 January 2026 all schools which are their own admission authority will have applied their admission criteria and will provide Surrey's admissions team with a list of all applicants in rank order. This will enable Surrey to offer places to ensure that under the terms of the coordinated scheme each applicant is offered the highest possible ranked preference. Surrey County Council will expect schools to adhere to their published admission number unless there are exceptional circumstances such as if this would not enable the local authority to fulfil its statutory duty where the demand for places exceeds the number of places available.
15. Surrey's admissions team will carry out all reasonable checks to ensure that pupil rankings are correct for all schools in Surrey before uploading data to the Pan London Register.
16. Between 2 and 13 February 2026 Surrey's admissions team will send and receive electronic files with all coordinating local authorities, in order to achieve a single offer. Where a

management decision is made that additional iterations are necessary, these will continue no later than 17 February 2026.

Offers

17. Surrey's admissions team will identify the school place to be offered and communicate information as necessary to other local authorities by 17 February 2026. In instances where more than one school could make an offer of a place to a child, Surrey's admissions team will offer a place at the school which the parent had ranked highest on the application form. Where Surrey is unable to offer a place at any of the preferred schools the admissions team will offer a place at an alternative community or voluntary controlled school with places or by arrangement with an academy or foundation, free, trust or voluntary aided school with places.
18. Surrey's admissions team will not make an additional offer between the end of the iterative process and 2 March 2026 which may impact on an offer being made by another participating local authority.
19. Notwithstanding paragraph 17, if an error is identified within the allocation of places at a Surrey school, the admissions team will attempt to manually resolve the allocation to correct the error. Where this impacts on another local authority (either as a home or maintaining local authority) Surrey's admissions team will liaise with that local authority to attempt to resolve the correct offer and any multiple offers which might occur. However, if another local authority is unable to resolve a multiple offer, or if the impact is too far reaching, Surrey's admissions team will accept that the applicant(s) affected might receive a multiple offer.
20. Surrey's admissions team will participate in the Pan London offer data checking exercise scheduled between 16 and 23 February 2026.
21. Surrey's admissions team will send a file to the E-Admissions portal with outcomes for all resident applicants who have applied online no later than 26 February 2026. This file will additionally contain offers to late applicants who can be offered a place on 2 March 2026.
22. By 2 March 2026, a list of children being allocated places will be **shared with each** secondary school for their information.
23. On 2 March 2026 an outcome will be sent by Surrey's admissions team to all parents who have completed a Surrey application form. ~~Where a first preference has not been met a letter will be sent by first class post which will refer parents to Surrey's website or the Contact Centre for further advice.~~ Parents will be asked to confirm whether or not they wish to accept any school place offered. **Under no circumstances must any school write to or make any other contact with parents to make an offer of a place or take any action to inform them that a place will or will not be offered before 2 March 2026.**

Late Applications and changes of preference

24. It is recognised that applications will be received after the closing date and that some parents will wish to change their preference e.g. if a family is new to the area or has moved house. Such applications must still be dealt with and this section deals with applications received in these circumstances.

Applications and changes of preference received after the closing date but before 2 March 2026

25. Some late applications will be treated as late for good reason. These will generally relate to applications from families who are new to the area where it could not reasonably have been expected that an application could have been made by the closing date. Applicants must be able to provide recent proof of ownership or tenancy of a Surrey property (completion or signed tenancy agreement). Other cases might relate to a single parent family where the parent has been ill or where there has been a recent bereavement of a close relative. These cases will be considered individually on their merits.
26. The latest date that an application from a Surrey resident can be accepted as late for good reason is 8 December 2025. If an application is deemed late for good reason and all supporting information is received by this date it will be passed to any admission authority named for consideration, alongside all applications received on time.
27. Where applications which have been accepted as late for good reason contain preferences for schools in other local authorities, the admissions team will forward the details to maintaining local authorities as they are received.
28. The latest date for the upload to the Pan London Register of late applications from Surrey residents which are considered to be on time is 11 December 2025.
29. Where an applicant lives out of county, Surrey will accept late applications which are considered to be on time within the terms of the home local authority's scheme up to 11 December 2025.
30. Where an applicant moves from one participating home local authority to another after submitting an on time application under the terms of the former home local authority's scheme, the new home local authority will accept the application as on time up to 8 December 2025, on the basis that an on time application already exists within the Pan London system, **but only if all evidence is received by this date**. Applicants moving to or from non-participating Pan London local authorities will be managed on a case by case basis.
31. Late applications from parents where it could reasonably have been expected that an application could have been made by the closing date and those received after 8 December 2025 will be considered as late. These applications will not be processed until after all on time applications have been considered.
32. Some parents may wish to change a preference after the closing date due to a change of circumstances. Surrey's admissions team will accept changes to preferences after the closing date only where there is good reason, such as a house move or other significant change of circumstance, which makes the original preference no longer practical. Any such request for a change of preference must be supported by documentary evidence and must be received by 8 December 2025. Any changes of preference received after 8 December 2025 will not be considered until all on time applications have been dealt with.

Applications and changes of preference received between 2 March 2026 and 31 August 2026

33. Applications will continue to be received after 2 March 2026. Only those preferences expressed on the application form will be valid. Where the school is its own admission authority the application data will be **shared with** them requesting an outcome for the

preference within 14 days. Once the outcome is known for each preference Surrey's admissions team will issue the outcome letter to the parent.

34. Where the stated preference is for a school in a neighbouring authority the application form will be passed to that authority requesting an outcome for the preference within 14 days. Once the outcome is known for each preference Surrey's admissions team will issue the outcome letter to the parent.
35. After 2 March 2026 some parents may wish to change a preference or order of preferences due to a change of circumstances. Surrey's admissions team will accept changes to preferences or order of preferences after 2 March 2026. Parents may also name additional preferences after the offer day of 2 March 2026.
36. The coordination scheme will end on 31 August 2026. Applications received after 31 August 2026 will be considered in line with Surrey's in year admissions procedures.

Post Offer

37. Surrey's admissions team will request that resident applicants accept or decline the offer of a place by 16 March 2026, or within two weeks of the date of any subsequent offer.
38. If they do not respond by this date Surrey's admissions team will issue a reminder. If the parent still does not respond the admissions team or the school, where it is its own admission authority, will make every reasonable effort to contact the parent to find out whether or not they wish to accept the place. Only where the parent fails to respond and the admissions team or school, where it is its own admission authority, can demonstrate that every reasonable effort has been made to contact the parent, will the offer of a place be withdrawn.
39. Where an applicant resident in Surrey accepts or declines a place in a Surrey school by 16 March 2026, Surrey's admissions team will **share this** information with the school by 23 March 2026.
40. Where an applicant resident in Surrey accepts or declines a place in a school maintained by another local authority by 16 March 2026, Surrey's admissions team will **share this** information **with** the maintaining local authority by 23 March 2026. Where such information is received from applicants after 16 March 2026, Surrey's admissions team will **share it with** the maintaining local authority as it is received.
41. Where an acceptance or decline is received for a Surrey school in respect of an applicant resident outside Surrey, Surrey's admissions team will **share** the information **with** the school as it is received.
42. When acting as a maintaining local authority, Surrey will inform the home local authority, where different, of an offer that can be made for a maintained school or academy (including a free school) in Surrey, in order that the home local authority can offer the place.
43. When acting as a maintaining local authority, Surrey and the admission authorities within it will not inform an applicant resident in another local authority that a place can be offered.
44. When acting as a home local authority, Surrey will offer a place at a maintained school or academy (including a free school) in the area of another local authority, provided that the school is ranked higher on the application form than any school already offered.

45. When acting as a home local authority, when Surrey is informed by a maintaining local authority of an offer which can be made to an applicant resident in Surrey which is ranked lower on the application form than any school already offered, it will inform the maintaining local authority that the offer will not be made.
46. When acting as a home local authority, when Surrey has agreed to a change of preferences or preference order, it will inform any maintaining local authority affected by the change.
47. When acting as a maintaining local authority, Surrey will inform the home local authority, where different, of any change to an applicant's offer status as soon as it occurs.
48. When acting as a maintaining local authority, Surrey will accept new applications (including additional preferences or preference order changes) from home local authorities for maintained schools and academies (including free schools) in its area.

Waiting Lists

49. Where a child does not receive an offer of their first preference school, their name will be placed on the waiting list for Surrey schools that are named as a higher preference school to the one they have been offered, in accordance with the policy of each admission authority. Parents will be advised that if they want to go on the waiting list for any out of county preference school that they should contact the school or the maintaining local authority for the school to establish their policy on waiting lists.
50. Details of pupils who have not been offered a higher preference school will be shared with the admission authority of each Surrey school by 2 March 2026.
51. Each admission authority will operate waiting lists so that it is clear which child will be eligible for the next offer of a place should a vacancy arise. The waiting list order will be determined by the admission criteria of the school. However, all offers must be made by the home local authority. Admission authorities are encouraged to share waiting list information confidentially with other local schools to support effective planning of school places.
52. Schools within Surrey will not inform any applicant that a place can be offered from a waiting list in advance of such notification being sent by the home local authority.
53. Waiting lists for each school will be held until at least the end of the Autumn term after which some schools may cancel their waiting lists. Details of how waiting lists for each school will be managed will be set out in the admission arrangements that apply to each school.



Addressing Inequalities

Equalities Impact Assessment

Surrey County Council Equality Impact Assessment Template

Stage one – initial screening

What is being assessed?	Coordinated admissions scheme for 2026
Service	School Admissions
Name of assessor/s	Claire Potier
Head of service	Trudy Pyatt
Date	16 October 2024
Is this a new or existing function or policy?	Existing policy under review

Write a brief description of your service, policy or function. It is important to focus on the service or policy the project aims to review or improve.

The coordinated admissions scheme describes the process by which each local authority will coordinate the applications for school places for their residents and for their schools, the exchange of information about preferences between admission authorities (including schools and other local authorities) and how they will make offers of places for schools in their area. There is a statutory duty for each LA to formulate and publish their scheme by 1 January each year.

Indicate for each equality group whether there may be a positive impact, negative impact, or no impact.

Equality Group	Positive	Negative	No impact	Reason
Age			X	
Gender Reassignment			X	
Disability			X	
Sex			X	
Religion and belief			X	

Pregnancy and maternity			X	
Race			X	
Sexual orientation			X	
Carers			X	
Other equality issues – please state			X	
HR and workforce issues			X	
Human Rights implications if relevant			X	

If you find a negative impact on any equality group you will need to complete stage one and move on to stage two and carry out a full EIA.

A full EIA will also need to be carried out if this is a high profile or major policy that will either effect many people or have a severe effect on some people.

Is a full EIA required?	Yes (go to stage two)	No
		X
If no briefly summarise reasons why you have reached this conclusion, the evidence for this and the nature of any stakeholder verification of your conclusion.		
The coordinated admissions scheme applies equally to all applicants and will not have a negative impact on any specific equality group.		
Briefly describe any positive impacts identified that have resulted in improved access or services		
The coordinated admissions scheme will ensure applications for a school place, including the most vulnerable, will be considered in an efficient and timely manner.		

For screenings only:

Review date	16 October 2024
Person responsible for review	Claire Potier
Head of Service signed off	Trudy Pyatt
Date completed	16 October 2024

- Signed off electronic version to be kept in your team for review
- Electronic copy to be forwarded to Equality and Diversity Manager for publishing

Stage 2 – Full Equality Impact Assessment - please refer to [equality impact assessment](#) guidance available on Snet

Introduction and background

Using the information from your screening please describe your service or function. This should include:

- **The aims and scope of the EIA**
- **The main beneficiaries or users**
- **The main equality, accessibility, social exclusion issues and barriers, and the equality groups they relate to (not all assessments will encounter issues relating to every strand)**

Now describe how this fits into ‘the bigger picture’ including other council or local plans and priorities.

Evidence gathering and fact-finding

What evidence is available to support your views above? Please include a summary of the available evidence including identifying where there are gaps to be included in the action plan. *Remember to consider accessibility alongside the equality groups*

Sources of evidence may include:

- Service monitoring reports including equality monitoring data
- User feedback
- Population data – census, Mosaic
- Complaints data
- Published research, local or national.
- Feedback from consultations and focus groups
- Feedback from individuals or organisations representing the interests of key target groups
- Evidence from partner organisations, other council departments, district or borough councils and other local authorities

How have stakeholders been involved in this assessment? Who are they, and what is their view?

Analysis and assessment

**Given the available information, what is the actual or likely impact on minority, disadvantaged, vulnerable and socially excluded groups? Is this impact positive or negative or a mixture of both?
(Refer to the EIA guidance for full list of issues to consider when making your analysis)**

What can be done to reduce the effects of any negative impacts? Where negative impact cannot be completely diminished, can this be justified, and is it lawful?

Where there are positive impacts, what changes have been or will be made, who are the beneficiaries and how have they benefited?

Recommendations

Please summarise the main recommendations arising from the assessment. If it is impossible to diminish negative impacts to an acceptable or even lawful level the recommendation should be that the proposal or the relevant part of it should not proceed.

Action Plan – actions needed to implement the EIA recommendations

Issue	Action	Expected outcome	Who	Deadline for action

- Actions should have SMART Targets
- Actions should be reported to the Directorate Equality Group (DEG) and incorporated into the Equality and Diversity Action Plan, Service Plans and/or personal objectives of key staff.

Date taken to Directorate Equality Group for challenge and feedback	
Review date	
Person responsible for review	
Head of Service signed off	

Date completed	
Date forwarded to EIA coordinator for publishing	

- **Signed off electronic version to be kept in your team for review**
- **Electronic copy to be forwarded to your service EIA coordinator to forward for publishing on the external website**

EIA publishing checklist

- Plain English – will your EIA make sense to the public?
- Acronyms – check that you have explained any specialist names or terminology
- Evidence – will your evidence stand up to scrutiny; can you justify your conclusions?
- Stakeholders and verification – have you included a range of views and perspectives to back up your analysis?
- Gaps and information – have you identified any gaps in services or information that need to be addressed in the action plan?
- Legal framework – have you identified any potential discrimination and included actions to address it?
- Success stories – have you included any positive impacts that have resulted in change for the better?
- Action plan – is your action plan SMART? Have you informed the relevant people to ensure the action plan is carried out?
- Review – have you included a review date and a named person to carry it out?
- Challenge – has your EIA been taken to your DEG for challenge
- Signing off – has your Head of Service signed off your EIA?
- Basics – have you signed and dated your EIA and named it for publishing?

SURREY COUNTY COUNCIL**CABINET**

DATE:	26 NOVEMBER 2024
REPORT OF CABINET MEMBER:	KEVIN DEANUS - CABINET MEMBER FOR FIRE & RESCUE AND RESILIENCE
LEAD OFFICER:	LIZ MILLS, STRATEGIC DIRECTOR CUSTOMER TRANSFORMATION
SUBJECT:	APPROVAL TO PROCEED: CORONER'S SERVICE DIGITAL POST-MORTEM & MORTUARY FACILITY
ORGANISATION STRATEGY PRIORITY AREA:	NO ONE LEFT BEHIND / HIGH PERFORMING COUNCIL

Purpose of the Report:

The Coroner's Service is seeking to deliver a digital post-mortem service in Surrey. This will enable Surrey County Council to meet its statutory responsibilities under Sections 2 & 5 of the Coroners and Justice Act 2009, contain rising costs for pathology services and provide an enhanced service by using available technology to significantly reduce the number of invasive post-mortems that take place in the county. This will help to maintain the dignity of the deceased and create a better experience for bereaved families and faith communities to support the Council's priority of No One Left Behind. It will also enable service efficiencies in the longer term, alongside potential for income generation.

Recommendations:

It is recommended that Cabinet:

1. Approves the proposal to deliver a digital post-mortem service in Surrey.
2. Grants delegated authority to the Deputy Chief Executive & Executive Director for Resources to approve the transfer of £1.15m capital pipeline to budget to successfully deliver a Digital Post-Mortem Service in Surrey, following endorsement by Capital Programme Panel and subject to the annual revenue impact, including borrowing costs, being no more than £90k, as per the current Medium Term Financial Strategy (MTFS).
3. Notes the intention to commission a third-party provider to deliver a digital post-mortem scanning service, the costs of which will be met from the service revenue budget.

4. Agrees to delegate approval of the necessary steps to deliver this proposal up to +/- 10% of the budgetary tolerance level, including procurement route to market, any contract award decision and any other legal documentation required to facilitate the approvals within this report, to the Deputy Chief Executive & Executive Director for Resources in consultation with the Cabinet Member for Fire & Rescue and Resilience.

Reason for Recommendations:

The current model of post-mortem provision for the Surrey Coroner's Service is not sustainable due to increasing costs and ongoing challenges in providing a high-quality service for the deceased and bereaved families. There is currently no digital post-mortem capability in Surrey. This technology is used for only a small number of deceased (predominately faith and child deaths) who must be transported out of county. Other areas with digital post-mortem capability report that approximately 70-75% of all post-mortems can be done digitally. Investing in digital capability and the necessary infrastructure needed will minimise current risks in service delivery and enable efficiencies in the longer term through a significant reduction in invasive post-mortems.

Executive Summary:

Background:

1. Surrey County Council has a statutory duty under Sections 2 & 5 of the Coroners and Justice Act 2009 to provide sufficient resources to enable the practical and effective delivery of the Coronial function. Coroners are independent judges who investigate certain deaths to establish who the deceased was and how, when and where they came by their death. Alongside staffing and court facilities, the Council must also provide transport and storage for the deceased and post-mortems/diagnostics to establish cause of death.
2. Surrey is a busy and complex Coronial area due to its population size and several other factors, including five prisons, five acute hospitals, two large military barracks, long sections of motorway and railway, proximity to the UK's two largest airports and stretches of the River Thames. The Coroner receives an average of 3,500 referrals per year.
3. Approximately 2,400 Coronial post-mortems are carried out each year. Other areas with digital capability report that approx. 70-75% of all post-mortems can be done digitally (using a CT scanner). Initial analysis shows that with digital capability, the need for invasive post-mortems in Surrey would reduce to approximately 600 cases p/a.
4. Provision for storage and post-mortem services for the Surrey Coroner's deceased (community / hospital) is currently delivered by Berkshire Surrey Pathology Service (Frimley NHS Trust) at three hospital sites across Surrey, namely, Royal Surrey Hospital, Guildford, St Peters Hospital, Chertsey and

East Surrey Hospital at Redhill. A Service Level Agreement (SLA) is in place for the commissioning of this service.

5. Coronial post-mortems are carried out by pathologists paid for by the local authority under the terms of a service level agreement (SLA), using facilities in NHS mortuaries. Most post-mortems are invasive due to a lack of digital post-mortem infrastructure in the county.
6. Deceased requiring digital post-mortems (predominately faith and child deaths at present) must be transported out of county due to the lack of a digital facility.

Case for change:

7. The service is facing significant risks and issues, which means the current model of post-mortem provision is no longer sustainable:
 - Uncontrolled rising costs year-on-year due to conditions outside Surrey County Council's control – specialist services in a limited market
 - National shortage in pathologists trained in invasive post-mortems – hard to attract and retain specialists
 - Current NHS partner cannot guarantee required service levels – capacity, equipment and staffing challenges causing delays and inconsistent experience
 - Crisis of capacity in winter months within hospital mortuaries, alongside inadequate surge capacity
 - Delays and distress caused to bereaved families
8. From a total budget of £4.6m p/a, the Coroner's Service spends approximately £1.5m p/a on post-mortems and mortuary services. If the 'as is' continues and no investment is made, operational costs for these services will rise at an estimated minimum of £100k year-on-year. In addition, because these are specialist services in a limited market, the service carries an ongoing risk of having to manage increases to market rate that are difficult to control.

Benefits and Delivery of a Digital Post-Mortem Service:

9. While a digital approach will require some initial investment and adjustments to operational costs, financial modelling suggests that the cost of running a digital CT scanning service will be offset from Year 2 onwards by the savings generated from reducing the need for invasive post-mortems.
10. Switching to a digital service would also lead to improved service levels with the ability to conduct more post-mortems in a day from a single site. This would enable deceased persons to be released more quickly into the care of a family appointed funeral director and improve service efficiency. It will be a better experience for the bereaved and maintain the dignity of the deceased.

11. Initial analysis has identified that there would be an increased throughput of total post-mortems by a minimum of 30%, from 15 per day (across 3 sites), to 20 per day (at one site) with a digital scanning capability, at negligible change to annual cost.
12. SCC also possesses a key enabling property asset – a temporary body storage facility with capacity for 330 deceased - which is ideally positioned to facilitate a digital post-mortem service. The ability to enhance an existing facility reduces the level of capital investment required and drives intensified use aligned to the Council's Corporate Asset and Place Strategy. Its continued use will need to be secured through the planning process, as the facility currently has temporary planning permission. This will be a Regulation 3 determination, and early conversations have been positive. To note this is a core dependency for successful delivery of the proposal.
13. An estimated maximum capital investment of £1.15m would enhance the existing temporary body storage facility to deliver the provision of a digital imaging suite, including:
 - Design, construction, consultancy (includes contingency)
 - Construction of an external hardstanding area with essential infrastructure (power/water) to accommodate a mobile digital unit
 - Refurbishment of welfare facilities for staff
14. An options analysis identified that the most effective operational delivery model would be based on using contracted services and scanning equipment leased from a specialist provider, with a set of agreed standards, fees and add-ons. This will require a procurement exercise and award of contract. The annual costs of this contract will be met by the service revenue budget and will be offset by a planned reduction in the current service expenditure associated with conducting invasive post-mortems in existing mortuary facilities.
15. Having a digital post-mortem facility in Surrey would also create opportunities for income generation to help offset the cost of borrowing, as other areas without digital capability may wish to use the facility at an agreed rate. Informal conversations have suggested that there would be interest in such a proposal; however, income generation opportunities would need to be properly scoped following approval to proceed.
16. Operating a digital mortuary would require a licence from the Human Tissue Authority (HTA) and specific regulatory requirements to be met. Surrey County Council has successfully been issued with a HTA licence previously when it had to stand up its temporary body storage facility in December 2022 and care for deceased persons prior to post-mortem.

17. The Council will also need to consider the findings of The Fuller Inquiry¹ to take all appropriate steps to safeguard the security and dignity of the deceased in developing its operating procedures and staffing model to run a digital mortuary.

18. In summary, a digital post-mortem service will give the Council the ability to:

- Mitigate financial risks
- Guarantee service quality
- Create income-generating opportunities
- Manage times of high demand (e.g. winter pressures)
- Future-proof the Coroner's Service
- Safeguard the dignity of the deceased and provide an improved experience for the bereaved

Consultation:

19. The proposal has the full support of the Senior Coroner for Surrey who has been fully engaged and provided input throughout its development.

20. Subject to approval to proceed, engagement activity will be undertaken with key stakeholders including NHS partners, Faith Groups, Human Tissue Authority and other Coronial areas. Affected residents will be consulted through the planning process.

Risk Management and Implications:

21. Key risks associated with the proposal have been identified (below) and will be actively managed:

	Risk Description	Mitigation action / strategy
a.	Insufficient funding to deliver project / cost escalation	<ul style="list-style-type: none"> • Feasibility study will reflect risks and contingencies • The Council will monitor delivery • All stages will be managed by an in-house project team • Contingency built into estimated cost
b.	Do not receive permanent planning permission for proposed site	<ul style="list-style-type: none"> • Engage in early conversations with planning officers • Proactive engagement and consultation
c.	Lack of interest amongst specialist scanning providers to provide contracted services	<ul style="list-style-type: none"> • Early market engagement

¹ [Independent Inquiry into the Issue Raised by the David Fuller Case](#)

d.	Increased operational costs to run a digital post-mortem service (short to medium-term)	<ul style="list-style-type: none"> • Detailed understanding of expenditure • Offset against efficiencies elsewhere within the service • Robust contract management
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Financial and Value for Money Implications:

22. This proposal will enable the Council to deliver value for money by mitigating the financial risks and increasing year-on-year costs associated with the current need to commission highly specialised services within a limited market.
23. If no investment is made, it is projected that operational costs for this area of the service will rise by an estimated minimum of £100k in 2025/26 and a further £100k the following year, with an ongoing financial risk of further uncontrolled cost increases due to needing to match market rate for specialist services in a limited market.
24. With this proposal, an initial estimated increase of £87k in pathology costs (from £1.5m to £1.6m) is expected in Y1 due to the need for specialist mortuary roles that are not part of the current staffing structure. These are needed to meet Regulator (Human Tissue Authority) requirements and to provide necessary professional expertise.
25. It is anticipated that additional revenue costs for operating a digital facility will be offset by a reduction in costs associated with invasive post-mortems. A digital facility will also provide opportunities to generate income.
26. Table 1 (below) sets out the estimated revenue impact of the proposal. This includes the additional running costs of the pathology service, offset by other costs savings. Further details are shown in the Part 2 report. The annual cost of borrowing £1.15m is £90k. Any net efficiencies will be built into the Medium-Term Financial Strategy.

Table 1: Revenue Impact

Income and expenditure	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	2030/31 £m	Total £m
Income	-	-	-	-	-	-	-
Savings	(0.83)	(1.65)	(1.65)	(1.65)	(1.65)	(1.65)	(9.08)
Gross savings/income (input positive)	(0.83)	(1.65)	(1.65)	(1.65)	(1.65)	(1.65)	(9.08)
Revenue Cost							
Revenue costs	0.81	1.62	1.62	1.62	1.62	1.62	8.92
Net costs / (efficiencies) before borrowing)	(0.01)	(0.03)	(0.03)	(0.03)	(0.03)	(0.03)	(0.16)
Borrowing Costs	0.04	0.09	0.09	0.09	0.09	0.09	0.49
Net Cost / (efficiency)	0.03	0.06	0.06	0.06	0.06	0.06	0.33
Do Nothing revenue increase	0.11	0.22	0.22	0.22	0.22	0.22	1.19

27. Table 2 (below) sets out the Capital Profile.

Table 2: Capital Profile

Capex and Funding Profile	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	Total £m
Total Scheme cost	1.15	-	-	-	-	1.15
Funded by:						
Third Party	-	-	-	-	-	-
Government Grant	-	-	-	-	-	-
Revenue Funding	-	-	-	-	-	-
Capital Receipts	-	-	-	-	-	-
SCC Funding Required	(1.15)	-	-	-	-	(1.15)
Total Funding	(1.15)	-	-	-	-	(1.15)

28. Further work will be carried out to provide more accurate revenue and capital estimates. These will be scrutinised by Property Panel and Capital Programme Panel ahead of delegated approval to proceed.

29. In addition, this proposal will also enable the Council to maximise use of a body storage facility that has been invested in but currently only operates as a contingency, making best use of an existing asset.

Section 151 Officer Commentary:

30. The Council continues to operate in a very challenging financial environment. Local authorities across the country are experiencing significant budgetary pressures. Surrey County Council has made significant progress in recent years to improve the Council's financial resilience and whilst this has built a stronger financial base from which to deliver our services, the cost-of-service delivery, increasing demand, financial uncertainty and government policy changes mean we continue to face challenges to our financial position. This requires an increased focus on financial management to protect service

delivery, a continuation of the need to deliver financial efficiencies and reduce spending to achieve a balanced budget position each year.

31. In addition to these immediate challenges, the medium-term financial outlook beyond 2024/25 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, to ensure the stable provision of services in the medium term.
32. The recommendation limits both the capital expenditure and revenue impacts to levels included in the current MTFs. As such, the Section 151 Officer supports the recommendations.

Legal Implications – Monitoring Officer:

33. The Coroners and Justice Act 2009 provides for a Coroner to investigate deaths of certain individuals in certain circumstances. S5 (1) of that Act provides that the investigation should enable the Coroner to determine who the deceased was and how and when they died. The proposal contained in this report would enable the Coroner to fulfil that statutory function.

Equalities and Diversity:

34. The proposal will enable the Council to meet the needs of faith groups as part of the death management process and will provide an improved service for all Surrey residents. An Equality Impact Assessment will be completed as part of the design and planning of operational procedures to deliver a digital post-mortem service to understand the impacts for bereaved families and staff.

Other Implications:

35. 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 implications arising from this report.
Safeguarding responsibilities for vulnerable children and adults	Ability to safeguard the security and dignity of the deceased will be a fundamental requirement of a successful application for a HTA licence and the facility will be regulated.
Environmental sustainability	The facility has already had air source heat pumps installed. Any additional modifications/ additions

	to the site will include consideration for enhanced asset efficiency.
Compliance against net-zero emissions target and future climate compatibility/resilience	No implications arising from this report.
Public Health	No implications arising from this report.

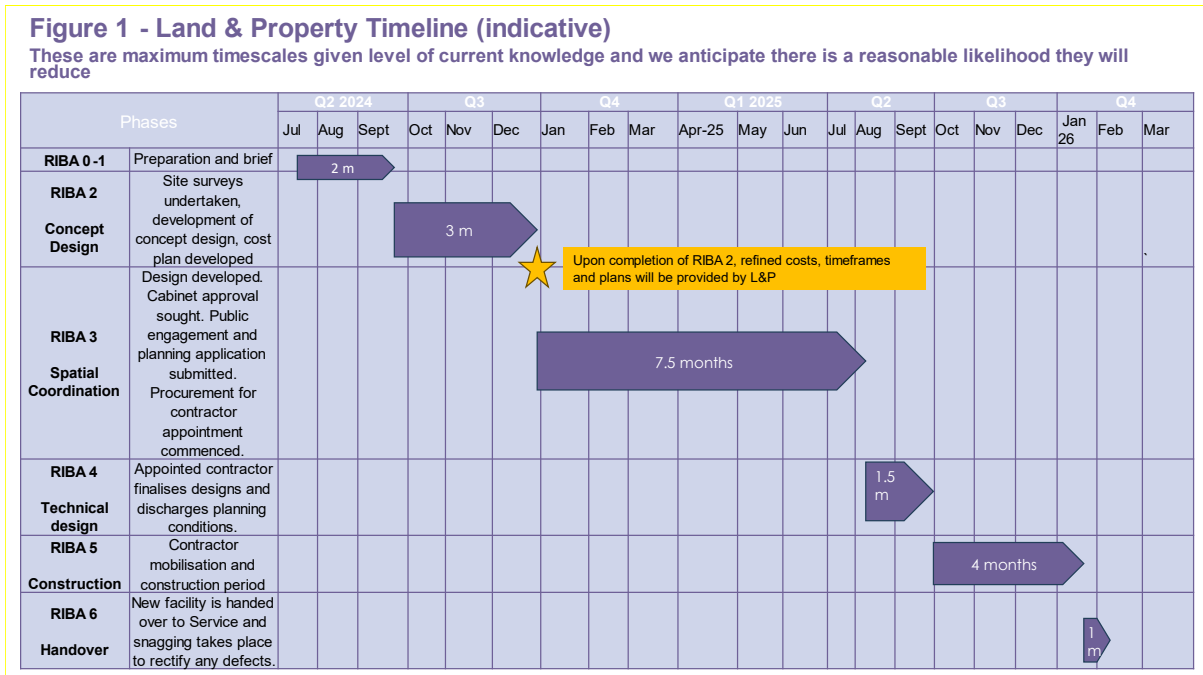
What Happens Next:

36. Subject to approval to proceed, the specific project details will be developed and delivered via Surrey County Council’s in house team, over seen by Land & Property Programme Management Office and the service.

37. Anticipated project steps include:

- Assembling the project team to develop design work to RIBA 2 (3 months). Following design, surveys and planning consultation, a fully costed project plan and timeline will be delivered.
- Applying for planning permission to retain the existing facility and introduce additional functionalities.
- Tender process and award of contract with a digital scanning provider
- Application for a Human Tissue Authority licence

38. An initial timeline of activities is shown at Figure 1 (below).



Report Author:

Sarah Bogunovic, Assistant Director Registrations, Coroner's Service & Customer Strategy, Sarah.bogunovic@surreycc.gov.uk

Consulted:

- Property Panel and Capital Programme Panel
- Communities, Environment & Highways Select Committee
- Senior Coroner for Surrey

Annexes:

Part 2 report

Sources/background papers:

None.

SURREY COUNTY COUNCIL**CABINET**

DATE:	26 NOVEMBER 2024
REPORT OF CABINET MEMBER:	DENISE TURNER-STEWART – DEPUTY LEADER AND CABINET MEMBER FOR CUSTOMER & COMMUNITIES
LEAD OFFICER:	LIZ MILLS, STRATEGIC DIRECTOR CUSTOMER TRANSFORMATION
SUBJECT:	APPROVAL TO PROCEED: REGISTRATION & NATIONALITY SERVICE – NEW OPERATING MODEL
ORGANISATION STRATEGY PRIORITY AREA:	NO ONE LEFT BEHIND / ENABLING A GREENER FUTURE / EMPOWERED AND THRIVING COMMUNITIES / HIGH PERFORMING COUNCIL

Purpose of the Report:

The Registration and Nationality Service is seeking approval to take forward a new operating model to modernise delivery of the service. A review of how the Registration Service delivers its statutory and non-statutory functions found that the current service model and associated property estate is no longer fit for purpose. The proposed new operating model will provide a more localised, efficient and commercially minded service. This will create an improved experience for residents, support increased income generation and will align with the Council's new dynamic customer operating model and wider organisation re-design. Maximising the use of existing Council assets across more areas of the county will also deliver co-location efficiencies. This proposal supports the Council's vision of No One Left Behind, along with delivery of the strategic objectives of Enabling a Greener Future, Empowered and Thriving Communities and being a High Performing Council.

Recommendations:

It is recommended that Cabinet agrees to:

1. Approve the proposed new operating model for the Registration & Nationality Service.
2. Approve (in principle) capital expenditure of up to £2m (excluding VAT) as included in the Medium-Term Financial Strategy (MTFS) for the delivery of the new service model, noting that the proposal will be self-funding through a later capital receipt from asset disposal and increased service income.

3. Delegate authority (i) to approve individual schemes/projects within the overall budget and a 10% tolerance (ii) to enter into any required legal documentation agreements and (iii) any procurement and contract award, to the Deputy Chief Executive & Executive Director for Resources, in consultation with the Cabinet Members for Customer & Communities and Property, Waste & Infrastructure.

Reason for Recommendations:

The current model of delivery for the Registration & Nationality Service is not fit-for-purpose in the long term. The proposed new operating model will reduce the number of dedicated single-use sites, whilst expanding provision across the county through greater co-location with other Council services and innovative use of existing assets for ceremonies. Whilst requiring some upfront investment, which is largely repaid within the programme period, the new service model will intensify use of the Council's property estate and enhance services for residents that can flex with changing needs, i.e. Government reform or Council priorities. This will enable the delivery of a sustainable operating model; generate increased income from maintainable and appropriate assets and provide services from locations that align with customer demand.

Executive Summary:

Background:

1. Surrey County Council's (SCC) Registration and Nationality Services is the 2nd and 3rd busiest in England and Wales for birth and death registrations respectively (based on volume of registrations). The service establishes a permanent legal record of every birth, death, marriage, and civil partnership in the county of Surrey, conducts and registers civil marriage and civil partnership ceremonies, issues certificates from all records held, and administers the oath and pledge taken by new British Citizens. The service also provides a facility for the legal preliminaries to all religious marriages but excluding those of the Church of England (except in specific circumstances).
2. The service's statutory responsibilities include the provision of ceremonies for marriage/civil partnerships, commonly known as a Register Office ceremony for the couple and two witnesses. However, larger ceremonies are a discretionary service that can be offered and that customers can choose to pay for. Local Authorities have the power to set their own fees and charges for additional discretionary services above and beyond the core statutory service offer, as well as the approval of private venues and for registration officers to conduct ceremonies at those venues.
3. The service is self-funding both through the collection of statutory fees and charges and the income generated from discretionary services (ceremonies). Any surplus income (approx. £1.7m forecast for 24/25) contributes to the Council's overall budget.
4. The service currently operates from 5 Register Offices across the county:

- Weybridge - a single-use freehold site
 - Guildford - a single-use freehold site
 - Leatherhead - a freehold asset co-located with library, family services and additional tenants
 - Camberley – a leasehold and co-located with office accommodation in Surrey Heath Borough Council’s offices
 - Reigate - a freehold asset and co-located with a library
5. Guildford, Leatherhead and Weybridge also have dedicated ceremony rooms. Staff offices are split across these three main sites.

The Case for Change:

6. A review of how the Registration and Nationality Service delivers its statutory and non-statutory functions was completed earlier this year. This identified the following risks and issues:
- a) Current estate no longer fit-for-purpose**
 - Sub-optimal locations – customers in the East and South of the county have far to travel
 - Maintenance and capacity issues in existing buildings
 - Accessibility issues
 - Historic lack of investment in ceremony rooms
 - Administrative functions spread across multiple sites
 - Lack of flexible space to accommodate changing ways of working
 - b) Potential for future Government Reform**
 - Any changes to the process to give notice of marriage or civil partnership will likely remove the need for face-to-face appointments
 - Ceremonies could take place anywhere, increasing the competition for venues
 - Ceremonies could be conducted by anyone with a licence, increasing competition for Registrars
 - c) Opportunities to deliver differently**
 - Existing historic and beautiful ceremony venues have potential, with investment, to generate significant commercial income
 - Centralising and streamlining administrative functions will improve resilience and generate efficiencies
 - Providing a more local service and maximising co-location opportunities will deliver better outcomes and improve the experience for residents

Proposed new operating model:

7. An options appraisal was undertaken (outlined in Annex 1), which included scaling back non-statutory functions. Options were reviewed against the below assessment criterion:

- Strategic Alignment
- Financial Impact
- Supports Growth
- Deliverability of Statutory Service
- Meets customer/resident needs
- Feasibility/Deliverability
- Future Proof

8. The following were the recommended options for the three key areas of service delivery:

a) Localised Registration Offer (11 locations)

- A service site in more District & Borough areas across the county aligned to customer demand and opportunities within the Council's property estate (e.g. through Libraries and Hubs)
- Reduces the carbon footprint of people traveling across county
- Will only require enhancements / refurbishments, so costs will be contained within self-financing budget
- Enhancement of statutory service
- Cross-organisational working and shared operating models, with opportunities for efficiencies
- Drives intensified use of Council assets aligned to Corporate Asset and Place Strategy

b) Enhanced Ceremonies Offer

- Investment in existing ceremony building(s) to provide a better offer for customers & increase income
- Trial a premium ceremonies venue at Rylston, Weybridge – aligning refurbishment works with previously approved Greener Futures decarbonisation works and planned workplace & facilities work at this venue
- Opportunity to attract more customers from out-of-county to increase income

c) Central Admin Office

- Co-locating and centralising administrative functions to improve resilience and service delivery
- Aligns with organisation re-design principles, will streamline the service and deliver efficiencies

9. Analysis of customer demand across the county and applying a travel distance of 3 miles or less identified the following as the preferred locations for delivery of the localised statutory service offer:

- Camberley
- Epsom
- Esher
- Farnham
- Guildford

- Horley
- Leatherhead
- Reigate
- Staines
- Weybridge
- Woking

10. Rylston, our venue at Weybridge, has been identified as the preferred location to trial a premium ceremonies venue because i) decarbonisation and capital improvement works have already been approved and will be undertaken for this building, ii) it generates the highest amount of ceremonies revenue for the service at present and; iii) it is well located, offers unique characteristics and costs less per m2 to run than other viable sites.
11. Delivery of a localised statutory service offer will be phased depending on opportunities and sequencing of other programmes (e.g. Libraries and Hubs capital programmes).
12. Approval to proceed will formalise plans to include the Registration & Nationality Service within property solutions, mapping opportunities to deliver a localised offer in identified locations (set out earlier in the report) as part of the Council's Corporate Asset and Place Strategy.
13. Service demand will be reviewed on an ongoing basis to see if proposed locations and property options are practical / feasible. This will help make decisions for each site as opportunities are identified, which might change the overall delivery plan.

Consultation:

14. Subject to approval to proceed, engagement activity will be undertaken with key stakeholders, including the General Register Office (GRO).

Risk Management and Implications:

15. Key risks associated with the proposal have been identified (below) and will be actively managed:

	Risk description	Mitigation action/strategy
1.	Cost of construction rising	Inflation figure added in contingency
2.	Works being carried out cause issue with current service provision	Pre-start meeting to discuss programme and planned work areas
3.	Material Shortages	Early procurement to confirm contractor/s
4.	Material price increase	Risk and inflation figure included in financial modelling

	Risk description	Mitigation action/strategy
5.	Delivery is dependent on Hubs and Libraries capital programmes for some identified localities	Senior stakeholders engaged and preferred locations identified at an early stage to enable opportunities to be explored
6.	"Do nothing" option creates a risk for future service income to decline; both once any proposed legislative changes are approved and due to the lack of investment within the estate	Proposal for new operating model developed and brought to Cabinet for approval
7.	Capital receipt from disposal of asset/s required for the proposal to be self-funding is not realised	See Part 2.

Financial and Value for Money Implications:

16. This proposal will enable the Council to demonstrate Value for Money by:

- a) **Asset optimisation** – ability to facilitate service change to help deliver; the Council’s 2030 “net zero”, optimisation of existing assets and release of asset/s for capital receipt.
- b) **Financial resilience** – ability to deliver the changes under self-financing programme and drive income from enriched service offer. Also offers flexibility and change of use of spaces should changes in Government reform be implemented.
- c) **Increased commercial activity** – investment in existing ceremony building(s) will provide a better offer to customers and increase income through improved commercialisation opportunities.

17. Capital will be drawn from Pipeline included in the MTFS. The scheme capital cost will be largely offset by a capital receipt generated as part of the programme as set out in the Part 2 report.

18. Should the capital receipt be lower than the total spend required, financial modelling shows that the residual revenue cost of borrowing and any additional revenue costs will be offset by income generation / savings (as shown in Table 1 below):

Table 1: High-level Revenue Impact

Income and expenditure	2024/25 £m	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	Total £m
Additional service income	-	(0.05)	(0.15)	(0.15)	(0.15)	(0.15)	(0.65)
Building running cost savings	-	(0.02)	(0.06)	(0.06)	(0.06)	(0.06)	(0.26)
Gross savings/income (input positive)	-	(0.07)	(0.21)	(0.21)	(0.21)	(0.21)	(0.91)
Revenue Cost							
Additional building running cost	-	0.02	0.06	0.06	0.06	0.06	0.26
Net costs / (efficiencies) before borrowing)	-	(0.05)	(0.15)	(0.15)	(0.15)	(0.15)	(0.65)
Borrowing Costs	0.00	0.04	0.03	0.02	0.02	0.02	0.12

19. No additional expenditure beyond the £2m from pipeline is required. The overall programme will remain within a proposed self-financing £2m capital budget envelope.
20. Specific projects will come forward via internal governance on an individual basis. As plans are developed, more accurate estimates will be scrutinised by Property Panel and Capital Programme Panel ahead of delegated approvals.
21. The high-level estimate is that additional service revenue surplus will exceed the revenue cost of borrowing and additional running costs. Any such excess will be reflected in the MTFs as an efficiency.
22. At the point programme implementation enables a capital receipt to be realised from the sale of assets, the programme will generate a year-on-year net surplus to support wider Council priorities.
23. No additional staffing costs are anticipated because the proposal will enable a more flexible staffing model that will be able to service more locations.
24. The long-term ambition is that the new service operating model will reduce costs incurred for buildings that are no longer fit for purpose and provide buildings that better serve customer and service needs.

Section 151 Officer Commentary:

25. The Council continues to operate in a very challenging financial environment. Local authorities across the country are experiencing significant budgetary pressures. Surrey County Council has made significant progress in recent years to improve the Council's financial resilience and whilst this has built a stronger financial base from which to deliver our services, the cost-of-service delivery, increasing demand, financial uncertainty and government policy changes mean we continue to face challenges to our financial position. This requires an increased focus on financial management to protect service delivery, a continuation of the need to deliver financial efficiencies and reduce spending to achieve a balanced budget position each year.
26. In addition to these immediate challenges, the medium-term financial outlook beyond 2024/25 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, to ensure the stable provision of services in the medium term.

27. The recommendation limits both the capital expenditure and revenue impacts to levels included in the current MTFS. It will also generate efficiencies which will be reflected in the MTFS. As such, the Section 151 Officer supports the recommendations.

Legal Implications – Monitoring Officer:

28. This paper seeks Cabinet approval of a new operating model for the delivery of the Registration and Nationality Service and a service improvement programme including the refurbishment of several sites across the County.
29. Under Section 2(1) of the Local Authorities (Land) Act 1963 a local authority has extensive development powers and may, for the benefit or improvement of its area, erect, extend, alter or re-erect any building and construct or carry out works on land. The Council therefore has the power to carry out the refurbishment works outlined in this paper, subject to obtaining any necessary consents for each site. It should be noted that for any leasehold assets, the Council may need to obtain the formal consent of the landlord prior to carrying out works.
30. Cabinet is under fiduciary duties to local residents in utilising public monies and in considering this business case Cabinet Members will want to satisfy themselves that it represents an appropriate use of the Council's resources.
31. Legal advice should be sought at all relevant stages to ensure that the Council meets its obligations.

Equalities and Diversity:

32. This proposal will provide an enhanced statutory service offer to all residents, making the Registration & Nationality Service more accessible across the county. Detailed Equality Impact Assessments will be completed on a project-by-project basis as they are developed within the programme.
33. This proposal will also enable the Registration & Nationality Service to operate from physical spaces that meet accessibility regulations.

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:

Area assessed:	Direct Implications:
Corporate Parenting/Looked After Children	No implications arising from this report.
Safeguarding responsibilities for vulnerable children and adults	No implications arising from this report.
Environmental sustainability	Any additional modifications/ additions to buildings will include consideration for enhanced asset efficiency.
Compliance against net-zero emissions target and future climate compatibility/resilience	Proposal will reduce the carbon footprint of people travelling across the county to access Registration Services.
Public Health	Co-location and opportunities for shared service operating models will enable the Registration & Nationality Service to support prevention through maximising opportunities with face-to-face contacts to connect residents to early help and support, helping reduce health inequalities.

What Happens Next:

35. Subject to approval of the operating model, specific project details will be developed and delivered via Surrey County Council's in house provision, overseen by Land & Property Programme Management Office and the service as key stakeholders.

Report Author:

Sarah Bogunovic - Assistant Director - Registrations, Coroner's Service & Customer Strategy
 Email: sarah.bogunovic@surreycc.gov.uk

Consulted:

List of internal members/groups/stakeholders who have been consulted on the proposals contained within the report:

- Property Panel and Capital Programme Panel

- Communities, Environment & Highways Select Committee

Details of groups, partners or organisations who have been or will be consulted on the proposed decision:

- General Register Office

Annexes:

Annex 1 – Summary of Options Appraisal

Part 2 report

Sources/background papers:

None.

Annex 1: Summary of Options Appraisal

	Option	Strategic alignment	Financial impact	Supports growth	Statutory services	Customer / resident needs	Feasibility	Future proof
0	Local registration offices	Green	Yellow	N/A	Green	Green	Green	Green
1	Stop provision of Registrars for ceremonies	Yellow	Red	Red	Green	Red	Green	Red
2	Stop providing ceremony venues	Yellow	Yellow	Red	Yellow	Red	Green	Yellow
3	Stop both Registrars and ceremony venues	Yellow	Yellow	Red	Yellow	Red	Green	Yellow
4	Do nothing	Red	Yellow	Red	Yellow	Red	Green	Red
5	Use spare capacity and new products	Yellow	Yellow	Yellow	Yellow	Red	Green	Red
6	Refurbishment of current buildings	Yellow	Red	Yellow	Yellow	Yellow	Yellow	Red
7	1 admin hub plus 2 venues	Yellow	Red	Yellow	Yellow	Yellow	Yellow	Red
8	1 admin hub and 1 flagship ceremony venue	Green	Yellow	Green	Yellow	Green	Yellow	Green
9	Source new admin hub	Green	Green	Green	Yellow	Green	Green	Green
10	Source new flagship venue	Yellow	Red	Green	Green	Yellow	Red	Yellow
11	Source new flagship venue and admin hub	Yellow	Yellow	Green	Green	Yellow	Yellow	Yellow

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SURREY COUNTY COUNCIL**CABINET****DATE: 26 NOVEMBER 2024****REPORT OF CABINET MEMBER: SINEAD MOONEY, CABINET MEMBER FOR ADULT SOCIAL CARE****NATALIE BRAMHALL, CABINET MEMBER FOR PROPERTY, WASTE, AND INFRASTRUCTURE****LEAD OFFICER: CLAIRE EDGAR – EXECUTIVE DIRECTOR, ADULTS, WELLBEING AND HEALTH PARTNERSHIPS
SIMON CROWTHER, INTERIM EXECUTIVE DIRECTOR, ENVIRONMENT, PROPERTY AND GROWTH****SUBJECT: RIGHT HOMES, RIGHT SUPPORT: OLDER PEOPLE'S RESIDENTIAL AND NURSING CARE DELIVERY STRATEGY****ORGANISATION STRATEGY PRIORITY AREA: NO ONE LEFT BEHIND / TACKLING HEALTH INEQUALITY / EMPOWERED AND THRIVING COMMUNITIES / HIGH PERFORMING COUNCIL / ENABLING A GREENER FUTURE****Purpose of the Report:**

This report seeks Cabinet approval for our Residential and Nursing Care Delivery Strategy to improve our residential and nursing care offer for older residents in Surrey within the wider Right Homes, Right Support Strategy¹ (RHRS). Its inclusion ensures that Surrey County Council (the Council) has a comprehensive strategy across Supported Independent Living for working age adults, affordable Extra Care Housing, and Residential and Nursing Care for older people.

Our Residential and Nursing Care Strategy recognises the importance that the Council places on having the right accommodation, in the right place to meet future need and demand for our residents, that is high quality and financially sustainable. It will enable us to deliver care homes that are fit for purpose and offers a wide range of services to meet complex needs. This supports the Surrey Way by tackling health inequalities, empowering our communities and ensuring no one is left behind.

An initial assessment of the Council owned residential settings has been undertaken and it has been identified that some of the homes will not be fit for the future and will require investment to ensure that they meet the future resident needs. A detailed assessment of sites and future delivery options is required to ensure we achieve the aims of the Residential and Nursing Care Strategy.

¹ Formerly known as the Accommodation with Care and Support Strategy [16. Accommodation with Care support Cabinet report July 2019.pdf \(surreycc.gov.uk\)](#)

Recommendations:

It is recommended that Cabinet:

1. Approves the Right Homes, Right Support: Older People's Residential and Nursing Delivery Strategy.
2. Approves £3.6m of capital funding from the Council's capital pipeline for the Older People's Residential and Nursing Delivery Strategy to:
 - i. Undertake the necessary Royal Institute of British Architects (RIBA) Stage 0 Strategic Definition Studies, RIBA Stage 1 Feasibility Studies, and market engagement across the whole Council owned care home portfolio.
 - ii. Enable a strategic business case to be developed across the whole care home portfolio.
3. Notes the direction of travel for care homes on Council owned land (set out in recommendation 2) and the possible need for public consultation on the proposed future use of sites.

Reason for Recommendations:

Approval of the Strategy set out within this report will:

- a) Enable independence and improved outcomes for Surrey's older residents for as long as possible through delivering specialist care home accommodation, which will play a key role in the prevention of early admissions into acute hospitals and into long term care home placements that may not be necessary.
- b) Ensure that there is sufficient care home provision available to meet the increasing older peoples' population in Surrey and that can support people with complex mental health needs and complex physical frailty.
- c) Enable us to address the current, and future, deficit in available capacity from the wider care market. Despite extensive steps taken to address prices paid, developing new contracting arrangements, and investing in care home capabilities across the Surrey care market, we need new opportunities and improved capacity to enable the best outcomes for residents.
- d) Enhance our offer of support to providers to improve quality and outcomes for all residents receiving care and enable them to deliver services to meet increased demand and complex needs.
- e) Long standing strategic contracts commissioned by the Council will be managed through robust expiry planning to ensure there is minimal disruption to residents, carers, families and operational teams.
- f) Ensure that we develop (subject to detailed market engagement, feasibility studies and outcomes of possible public consultation) the most commercially viable and financially sustainable strategic business case for the Council to achieve its Residential and Nursing Care Strategy for Surrey's older residents.

- g) Ensure effective use of the Council's assets to deliver improved outcomes for our residents, that is financially sustainable and means 'no one is left behind'.

Background and Context:

Strategic Context and Our Vision for Surrey

1. In 2018 the Council embarked on a large-scale engagement activity with residents, staff, members, partners and businesses to shape our community vision for Surrey in 2030². Together we agreed that: 'By 2030 we want Surrey to 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.' It is essential that the care and support provided by Adults, Wellbeing and Health Partnerships (AWHP) promotes independence and improves outcomes for our residents in all we do and offer.
2. We have developed our new Right Homes, Right Support: Residential and Nursing Care Delivery Strategy to focus on responding to the increase in demand for more complex residential and nursing care needs. This will also support the Council to respond to challenges faced due to limited affordable capacity, which leads to increased costs and time delays in sourcing residential care placements for residents whose care is commissioned and paid by the Council.
3. Initial assessment of the 16 Council owned residential care homes has identified that several care homes are not fit for the future and will require investment to ensure that we achieve the aims of the Residential and Nursing Care Strategy. A more detailed review of the estate is required to ensure we establish the most economically viable plan, which will ensure that we have the most suitable, viable and efficient estate to meet the current and future needs of our residents.

Our ageing population and future demand for enhanced residential and nursing care

4. Surrey has an increasingly ageing population with a life expectancy above the national average for both men and women³. 230,000 people in Surrey are over the age of 65 with an expected growth to 270,000 people by 2030, with the largest growth expected in the number of people who are 85+. The average age for residents living in Surrey's older people's care homes is 85 years old.
5. Surrey is seeing more people living at home for longer, through accessing home-based care packages and community services through Direct Payments. This means we are seeing a decrease in need for lower levels of residential care. These community services are an alternative to low-level residential care, until the individual's care and support needs develop to such a point, that these arrangements are no longer sufficient and then require more formal care settings. We also anticipate that with future affordable Extra Care Housing in the pipeline, this will further reduce demand for low level residential care and should prevent individuals requiring additional placements in enhanced residential or nursing care.
6. For older people in care homes, the number of permanent admissions to residential and nursing care home per 100,000 people aged 65+ decreased by 17% from 558.0

² [Community Vision for Surrey in 2030](#)

³ [Joint Strategic Needs Assessment \(JSNA\) for Surrey's Population](#)

in 2010 to 464.1 in 2020. However, AWP admissions to care homes have remained static over the last few years, averaging 2,160 admissions a year (with a slight dip in 2021 due to the pandemic). Multimorbidity (defined as the co-occurrence of two or more chronic conditions) and frailty (which commonly coexist) contribute to more complex care needs for residents. We estimate that there are around 90,000 residents aged 65 and over with multimorbidity and 22,000 with frailty. This is outlined in detail in our Older People’s Residential and Nursing Care - Market Positioning Statement⁴ and the Living Well in Later Life Strategy 2021 – 2030⁵.

7. We are experiencing an increase in the number of residents placed in care home settings that have complex care and support needs, placed under the category ‘enhanced residential’ and ‘enhanced nursing’. Complex care has been defined as ‘older people with complex mental health needs’ specifically referring to people with mental health conditions including dementia, functional mental health problems and behaviour that challenges.
8. To enable us to plan for future residential and nursing care requirements we have forecasted projected demand for Council-funded placements up to 2030 (using data from between 2016 and 2023). Our analysis explored the following areas that impact demand: the population of older people in Surrey, the response to the Covid-19 pandemic, the introduction of a strengths based approach⁶ in AWP, the use of Direct Payments (or other alternative services such as Extra Care Housing), an estimate for the financial eligibility of those requesting support, and the prevalence of health conditions which result in older people no longer being able to safely stay in their own homes. The projected future demand is presented in Table 1, and we will continue monitor the projected demand for these services over the course of the Strategy.

Table 1. Projected future demand for residential, enhanced residential and nursing care

Accommodation Type	Estimated No. Older People in Jan 2030	Difference from Jan 2024
Residential	55 - 100	-290
Enhanced Residential	1,070 – 1,130	+120
Nursing	1,460 – 1,530	+110
Total	2,585 – 2,760	-60

The existing residential and nursing care market

9. In March 2024, CQC data shows that there are currently 213 residential and nursing care homes registered (10,468 beds) within Surrey who predominantly provide services for older people. The Market Sustainability Plan developed in 2023 evidenced that within this care home market approximately 28% is Council funded and 72% is private funded individuals, other local authority placements and NHS.
10. The non-nursing care home market in Surrey has decreased in size since 2017. Eight Council residential care homes were closed in 2022, as well as some small provider homes closing due to financial sustainability from high operational costs and newer

⁴ [Older People’s Residential and Nursing Care Home – Market Position Statement](#)

⁵ [Living Well in Later Life: Older People’s Commissioning Strategy 2021 - 2030](#)

⁶ [Strength Based Approach](#)

homes opening close by. CQC data indicates that the number of beds in non-nursing care homes has decreased by approximately 14% (814 beds) over the last 5 years, whilst during the same time period beds in nursing homes have increased by 6% (269 beds).

11. Furthermore, care home providers are increasingly risk-averse due to concerns about potential reputational damage. The complexity of care needs presents higher risks of incidents or issues occurring within care homes, which are viewed by providers to negatively impact on their reputation and lead to regulatory scrutiny. Some care home providers have also struggled to adapt and meet the demand in the rapid changes in the level of care needs, particularly since the COVID-19 pandemic. Council commissioners are supporting the market through additional resources, training, and workforce planning to address these concerns.
12. The relative affluence of Surrey's residents means there is a high percentage of self-funded placements in the market, which presents the Council with challenges when securing affordable placements. The lack of affordable provision remains a significant barrier for long-term care placements, creating inequitable access to quality care services for Surrey's residents. With a high proportion of self-funder providers often supporting residents with lower needs than would be placed by the Council and at higher prices.
13. A key challenge for the Council is that the self-funder market also places additional cost risks and capacity constraints based on growing numbers of self-funders reaching capital threshold, the point at which an individual's financial assets fall below a level that means the Council has a responsibility to fund some or all of the cost of their care. Alongside developing new capacity, the Council will continue to provide information and advice to residents, carers, families and care homes, relating to financial affordability and suitability of care home placements for many residents who could, with support, remain at home for longer.
14. We commission individual and block contracts through the Integrated Residential and Nursing Contract (RNC), developed in July 2022. To date the contract is working with 175 care homes both in Surrey and out of county, which is 67% of Surrey's care home market with each home offering approx. 30% capacity for residential and nursing care. The RNC supports placements at AWHP guide price for approximately 80% of placements, however the continued increase in demand and complexity results in some placements being made outside of this contract through 'exceptions' and often at rates above AWHP guide price.
15. Alongside the RNC, various initiatives are underway to enhance the quality of care in residential and nursing settings in Surrey, as well as supporting the provider market. This includes actively seeking new capacity opportunities through the Residential and Nursing Contract, promoting positive practices through the 'My Home Life' project to improve leadership and quality of life, and providing support to staff in dementia care homes through the 'Surrey Admiral Dementia Nurse Care Home Project'. Community health provision is being delivered in care homes to address complex needs and prevent delays.

Existing residential care delivered on Surrey County Council owned land

16. Within the whole older people's care home market capacity, the Council owns 16 care homes that are currently leased to Care UK and Anchor until January 2027 and March 2028 respectively, with one of the homes leased to Care UK in an agreement until 2101. These care homes are presented in Annex 1. The Council commissions care and support via a block contract with Care UK and individual placements to Anchor to support residential and residential dementia care placements.
17. Care UK operates across 7 care homes on a 25-year block contract from January 2002 to January 2027. This contract offers residential, residential dementia and respite care capacity, but no nursing. Within this contract there are Council 293 beds (69%) at affordable rates within the total 425 beds in the homes. The remaining 132 beds (31%) are occupied by self-funders.
18. Anchor operates across 9 care homes with a total of 529 beds, offering residential, residential dementia and respite care capacity, but no nursing, to the Council and self-funders under individual placement agreements since April 2019. Previously, these 9 homes were operated under a block contract between 1998 and 2019 with 8 additional homes that were returned to the Council in 2019. These homes were subsequently closed by the Council in August 2022, following a public consultation, as they were at the end of their natural life span and investing in the services would not provide environments that are fit for the future.

'Homes for the future' – our residential and nursing care ambition for Surrey's residents

19. Our Strategy will address market challenges, support the Council's long term financial sustainability and support older people to maintain their independence and wellbeing for as long as possible, we will focus on preventative services and not wait until an emergency develops before supporting people. Our commissioning approach will focus on preventative actions, to keep people living independently and well for longer, as well as ensuring there is high quality provision to meet those with more complex needs and 'no one is left behind'.
20. Our ambition is to create a 'Homes for the future' model of care, which has been included in Annex 2. This will enable residents to remain in the same home (where possible) as their care needs increase, by potentially offering some dual-registered facilities that provide both residential and nursing care in one location to meet the increasing needs for more complex care, as well as residential only sites. We will look to develop future care homes on Council owned land that offer affordable capacity and are designed in a flexible and modern way to meet emerging needs.
21. New care homes will be developed in line with 'Surrey's Residential and Nursing Generic Design Brief' (GDB) and will support innovative Technology Enabled Care (TEC) environments. The GDB has been developed with an internal working group comprising of occupational therapist leads, quality assurance and AWHP locality managers and external provider expertise. The Brief details optimal care home design for individuals over 65, focusing on residential and nursing care facilities. The GDB will ensure residents' safety, comfort, and ease of access while fostering a sense of community and well-being.

22. Our 'Homes for the future' model of care will support older people with all levels of residential and nursing care including complex needs, as well as planned and urgent respite care. They will also support those with a primary need for learning disabilities over the age of 65+. Additionally, capacity that is available could be utilised to support services across the system for Discharge to Recover and Assess (D2RA), which will free up hospital bed capacity, support winter pressure surges and enable rehabilitation and step-down provision to be delivered with community services working with providers. There is also an emerging need to develop capacity to support an increase in individuals with bariatric needs. Outside of supporting people over 65+, future capacity development could support increases in early onset dementia for working age adults.
23. We will develop integrated partnership opportunities with health partners to prevent hospital admissions and promote innovative community-based care. We will co-design and co-produce our new care home services with residents, care providers, and strategic partners, including the NHS. This partnership approach aims to build on existing expertise within the market to develop innovative care models, enhance service quality, and increase affordable capacity for Surrey's residents.

Delivering our ambition with the residential and nursing care market

24. To deliver our ambition and respond to the increasing demand for enhanced residential and nursing care we will employ a mixed approach by continuing to work with the market, as well as explore how these services can be delivered on Council owned land.
25. We will continue to shape the residential and nursing care market. Our '*Older People Residential and Nursing Care - Market Positioning Statement*' (2023)⁷, which we jointly developed with local providers, outlines the type of residential care (with or without nursing) that is required, what is available at present, and the gaps in provision that need to be addressed to meet future demand. It provides an overview of how the Council will shape the market and work with local providers to develop a viable and sustainable market for older residents, ensuring high-quality care by supporting providers and addressing workforce issues. Key market challenges that this Strategy will help address are:
- Improving rapid hospital discharges. This will prevent people remaining in hospital for longer than they need to, which will support their independence and health. This will result in improved outcomes, limit reliance on hospital services, and increase the availability of beds for new admissions.
 - Increase the availability of 'enhanced residential' and 'enhanced nursing' care for people with complex needs.
26. Through existing contracting arrangements, commissioners will continue to try and increase available capacity from RNC providers and the wider Surrey care home market. It is however unlikely that any significant additional capacity will be made available from 'new' providers agreeing to join the RNC as extensive efforts have already been made over the last two years to increase this. We will therefore continue to expand our block contract opportunities to support the wider care home market and

⁷ [Older People Residential and Nursing Care - Market Positioning Statement \(surreycc.gov.uk\)](https://www.surreycc.gov.uk/older-people-residential-and-nursing-care-market-positioning-statement)

think innovatively about how we use existing available capacity. Block contracts offer providers continuity and more financial sustainability. An area of development could also see providers that currently deliver a lower level of residential care (that is projected to decrease in need), supported to change their service models to meet the increasing demand for more complex residential services.

Developing a strategic business case to deliver residential and nursing care on Council owned land

27. Due to the contracts and lease agreements ending with Care UK and Anchor, the Council must review the current arrangements and develop a strategic case to ensure it can continue to afford to place residents in appropriate care home settings to meet demand and needs beyond 2027. The work must be delivered at pace to avoid financial or reputational risk to the Council and ensure we deliver good outcomes for our residents.
28. Historically, these 16 homes were designed and contracted to meet low level residential care needs and not nursing or complex needs. There has been a strategic shift since the pandemic with placements for lower levels of residential care decreasing. As a result, over time, the residents moving into care home settings have more complex needs, as well as high physical frailty.
29. We have completed initial suitability assessments on all the 16 Council owned care homes with representatives from Land and Property (L&P) and AWP Commissioners, alongside work completed on our Residential and Nursing Generic Design Brief for future care home provision and geographical demand for affordable provision. We have considered each of the existing homes against the following options: retain, refurbish, redevelop, and release. This approach is in line with other decisions the Council has previously made on its care home portfolio sites.
30. Early analysis has shown that some of the 16 homes are not designed to support future needs. There are limited ensuite facilities, and considerable refurbishment works are required to transform them to meet future care requirements. Some of the buildings are reaching the end of their operational life and potential redevelopment will need to be considered.
31. We have started high level commercial modelling to evaluate the options for delivering the Strategy and support the development of a strategic business case. Following Cabinet endorsement, we will further develop our commercial modelling and continue market engagement to identify the potential delivery models, which are the most commercially viable and protect the Council's long term financial interests. We expect the costs for capital works for each of the sites to be high and therefore we will assess all models of delivery to minimise the capital costs that the Council will need to invest.
32. Our initial market engagement has identified an appetite within Surrey's care home market to work closely with us to deliver care home capacity on Council owned land. In August 2023, an online survey was distributed to the entire Surrey care home market and a total of 65 responses were received from both single and multiple care home providers, representing 45 providers in total. Follow-up calls were completed with 28 providers and the outcomes were positive. 14 providers expressed an interest in refurbishing and redeveloping existing Council owned sites to accommodate future demand, with five providers having available funds to construct new care homes.

Additionally, various providers showed interest in expanding capacity either through a single care home increase or clusters to optimise operational costs across a designated area. The next stage of developing the strategy will require more detailed market engagement as outlined above.

33. We will build on the previous market engagement to support the development of a strategic business case for delivering residential and nursing care on Council owned land. The strategic business case will include:

- Analysis of further in-depth market engagement
- Analysis of site feasibility studies
- Commercial modelling to identify the most financially and operationally suitable delivery route
- The outcome of potential public consultation
- The outcome of coproduction and engagement with residents, carers and families
- The overall procurement strategy for this element of the Strategy.

34. Subject to the identification of a commercially viable and financially sustainable delivery model, we plan to present the strategic business case for delivering residential and nursing care to Cabinet for approval at a later date.

Whole Residential and Nursing Care Strategy delivery

35. The table below summarises the Strategy for delivering residential and nursing care in Surrey. It specifies the anticipated number of beds and corresponding proportions which will come from the Council owned sites and the rest of the market. These numbers are based on the assumption that the Council owned care homes will have a 69% occupancy rate of Council funded residents. The total capacity refers to the forecasted number of residential and nursing care residents from our projected demand for 2030.

Table 2. Overview for delivery of 2,610-2,750 beds of residential and nursing care

Delivery Lead	Residential and Nursing Care
Council	24% (620-655 beds)
Market	76% (1,990-2,090 beds)
Total capacity	2,610-2,750

36. Mixed models of delivery are recommended as it allows the Council to strike a balance between purchasing some provision from the market whilst maintaining a market presence to offer affordable provision and guide rates. It allows flexibility to help meet demand whilst investing in future proofing council-owned assets.

Consultation:

Public Consultation

As soon as we have clear proposals for the future of the 16 homes, we will need to consider the need for a public consultation.

Coproduction, engagement and communications

- 14
37. Coproduction and engagement are essential parts of this delivery strategy. This ensures that the experiences, ideas and recommendations of key stakeholders such as residents, family members, carers, care staff, community partners, and providers are listened to and integrated into the design and delivery of care services.
 38. This collaborative approach will support the development of services that will truly meet the needs and expectations of those who will both use and provide the services. It promotes a strengths-based and person-centred care approach, enhancing the quality of life for residents by incorporating their input into areas like care and support services and daily activities, by understanding what is important to them.
 39. We will implement a comprehensive communications plan to support the delivery strategy, ensuring transparency and consistency for all stakeholders, including residents, families, carers, and the current workforce. Key elements include communicating in plain English across accessible formats, keeping local Surrey County Council councillors and strategic partners informed, and tailoring communication plans for each site based on the impact of change. Coordination with the Council's Communications Team will play a critical role in ensuring our communications are well-managed and delivered.

Risk Management and Implications:

40. We understand that whilst our Strategy will bring about a new opportunity to improve the residential and nursing care offer in Surrey, any change to service delivery can be unsettling. We will be open and transparent with residents, families, carers and staff currently residing and working in the homes that may be impacted by the proposed future use. We will work closely with the care home providers to limit disruption as best as possible and maintain an open and trusted dialogue between all parties. This approach is further set out in the 'Consultation' section of this report.
41. There is a risk that if the Council continues as is and does not deliver this Strategy, the current commissioned care contracts will not account for the changing demand and higher level of resident needs and is likely to cost the Council more to place people with higher needs elsewhere. The condition and suitability of some of the sites is also a risk as they are not considered fit for the future.
42. There is a risk that there may not be sufficient interest from the market to deliver what the Council proposes. Engagement with the market to date has proven positive and further market engagement is planned in the delivery of this Strategy. The existing care home market is significant nationally and locally, and is a long-standing integral part of the older people's sector, which demonstrates that it is attractive for third party operators to either expand or enter the market. On this basis, although further market engagement is required, we are confident that we will secure the required level of interest to ensure the approach is viable.
43. There is a risk that the programme will not be affordable for the Council. Benchmarking data has been used to inform modelling to date. This will be further refined through feasibility studies to achieve value for money. The Council will develop a strategic business case that represents best value for money and ensures that the Strategy can be delivered within the allocated Council resources. This will include key policy considerations such as greener futures. Various delivery models and procurement routes will be tested during the feasibility studies to develop the

strategic business case. Regular 'gateway' reviews will be undertaken to ensure the direction of the Strategy continues to be best value for the Council.

Financial and Value for Money Implications:

44. The £3.6m of capital funding requested in this report to complete RIBA Stages 0 and 1 will be funded from the allocation included in the Council's Medium Term Financial Strategy (MTFS) capital pipeline for the Right Homes Right Support Older People's Residential and Nursing Delivery Strategy.
45. The Council's capital programme assumes that any expenditure on the Older People's Residential and Nursing delivery strategy is fully self-financing. The working assumption is an external delivery partner will be secured through a tender and this partner (or partners) will build any new care homes/refurbish existing care homes, secure a proportion of the beds for private sale to self-funders and pay a financial contribution to the Council, with the remaining beds guaranteed to the Council through block contracts at affordable rates. The financial contribution to the Council would be funded by the partner(s) out of profit they make on the sale of self-funder beds, and either paid as a lump sum capital receipt or an annual revenue income stream.
46. Initial market engagement with the older people nursing and residential care sector has indicated an appetite for this sort of commercial arrangement, but this will need to be tested through further, more detailed market engagement which will only be proven through competitive tendering. Cabinet is therefore asked to approve the feasibility funding requested in this paper on the assumption that the planned delivery model is successfully implemented. If through further market engagement or a tender this model does not prove to be viable, then there is a risk that the borrowing costs may not be funded. The required market engagement will be undertaken early in the process to minimise the costs incurred during feasibility studies and reduces the exposure to costs being incurred should an external delivery route not be viable in whole or part.
47. Although developing the care homes will meet service needs and help to avoid the cost of placements the Council buys escalating above affordable levels (£3m cost avoidance is estimated), this will not release care package savings that could fund the borrowing costs.
48. It is therefore essential that there are 'gateway' checkpoints during the feasibility studies to assess at each stage the likelihood of a fully funded delivery model being achieved through a tender process based on market engagement. Should at any point the likelihood of a fully funded delivery model not be viable, or if it considered likely that the Council's capital expenditure required to complete the Strategy is likely to be above the current budget in the Council's capital pipeline, then the feasibility studies must be paused to enable a review of the Strategy and decisions on next steps. This will avoid significant further expenditure on care homes which may not be fully funded and therefore may need to be changed or stopped depending on affordability, in the context of the Council's overall capital programme and broader financial position.
49. Early analysis of construction costs has identified that significant capital resources is required to bring this aspect of the estate up to an acceptable standard, which further reinforces the need to identify and appraise an external delivery model.

50. If no action is taken, then the cost pressure on the council is estimated to be a minimum of £3m per annum in additional revenue care package costs due to having to pay higher prices for care home beds. Although this would not be a cost reduction saving that could fund the borrowing costs, developing the homes as intended is anticipated to avoid the additional care package expenditure that would otherwise be incurred. Modelling undertaken to date demonstrates that this mixed model of delivery is the most cost-effective way of meeting demand for residential and nursing care going forward.

Section 151 Officer Commentary:

51. The Council continues to operate in a very challenging financial environment. Local authorities across the country are experiencing significant budgetary pressures. The Council has made significant progress in recent years to improve its financial resilience and whilst this has built a stronger financial base from which to deliver our services, the cost-of-service delivery, increasing demand, financial uncertainty and government policy changes mean we continue to face challenges to our financial position. This requires an increased focus on financial management to protect service delivery, a continuation of the need to deliver financial efficiencies and reduce spending to achieve a balanced budget position each year.
52. In addition to these immediate challenges, the medium-term financial outlook beyond 2024/25 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 the stable provision of services in the medium term.
53. In this context the Section 151 Officer recognises the importance of delivering the Right Homes Right Support Older People's Residential and Nursing Delivery Strategy in order to ensure there is sufficient supply of the right types of care home provision to meet the growing complexity of care needs of older residents in Surrey who the Council has a responsibility to commission care and support arrangement for at affordable rates.
54. The Section 151 Officer would highlight the importance of the Strategy being developed on a fully self-financing basis in line with the assumptions built into the Council's Medium Term Financial Strategy. Further detailed market engagement should commence as soon as possible to test the commercial appetite for the external delivery model set out in this paper. Expenditure on feasibility studies should be paused if at any point it is considered that a fully self-financing external delivery model is not likely to be achievable, so that a review of the Strategy can be undertaken to determine the appropriate next steps before any further expenditure is incurred.

Legal Implications – Monitoring Officer:

55. We note that the approach to be adopted in respect of the operational premises, outlined in this paper, is subject to further detailed feasibility studies. Prior to the estates service making its recommendation it may need to seek further specific property legal input on the issues around the terms and conditions of any existing leases, any proposed new leases, and possible title restrictions on development. However, at this stage Cabinet should note the following.

- 56. In respect of any new leases that may be granted, this Council has general powers under Section 122 of the Local Government Act 1972, to dispose of properties, by way of lease, subject to the usual best value considerations under Section 123 of that Act.
- 57. In respect of any refurbishment works, or redevelopment, this Council has comprehensive powers under Section 2(1) of the Local Authorities (Land) Act 1963 to erect, extend, alter or redevelop its property for the benefit or improvement of its area.
- 58. Cabinet has duties to local residents, when utilising public funds to consider the business case for any such works and satisfy itself that such expenditure represents an appropriate use of funds. Insofar as they may be required, the Council should ensure that it obtains any necessary planning and other consents for works.
- 59. In addition to the property issues, the Council will need to be mindful of the public law issues that arise with any proposals to change or withdraw services. This will be particularly relevant with any proposal to close a care home. Public consultations will need to take place before Cabinet is asked to take any final decisions around the future of the homes currently being operated by Anchor and Care UK.
- 60. In procuring the services outlined in this report the Council must comply with the Council's Constitution and any relevant National legislation, alongside the Council's Procurement and Contract Standing Orders and the Public Contracts Regulations 2015 (including any superseding legislation) (where appropriate).
- 61. As this Strategy progresses, legal advice may also be necessary in relation to employment issues.

Equalities and Diversity:

62. An Equality Impact Assessment (EIA) has been completed to address how the Strategy may impact current residents of the care homes on Council owned land, future residents that may require residential or nursing care, their relatives, and carers and current staff working within the homes with protected characteristics. The EIA will be updated regularly to ensure equality issues are considered in decision-making. The EIA is available in full in Annex 3.

63. Early quality considerations include:

‘Homes for the future’: New care homes will better support those over 65, particularly those with dementia, offering improved outcomes and adaptable rooms for changing needs. Enhanced environments will support residents with disabilities, especially with larger rooms and improved building layouts. Care specifications can support ethnic or religious dietary needs and strengthen links with faith communities, while ensuite bathrooms will improve privacy and dignity.

Changes to existing care homes: Residents with physical or cognitive impairments may struggle with changes and building work. Potential relocation to alternative provision may affect residents' proximity to ethnic communities or faith groups where connections have been established. We will work with residents and the care home providers to ensure that any potential disruptions are minimised as best as possible, and residents are supported through any change that may occur.

64. The EIA will be updated as the Strategy continues to ensure that the public sector equality duty is reflected in any decisions going forward.

Other Implications:

65. 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	Improving our residential and nursing care offer available to residents can have a positive impact in terms of safeguarding, ensuring that vulnerable adults can live within safe, secure environments with appropriate care and support services designed around them.
Environmental sustainability	Environmental sustainability will be assessed during feasibility studies through relevant surveys and any implications reported as part of the strategic business case.
Compliance against net-zero emissions target and future climate compatibility/resilience	Decarbonisation of existing estate to be considered as part of the strategic business case for any sites to be retained or refurbished, as required. The Council's net zero carbon ambition will be explored during design development for any new build.
Public Health	Residential and nursing care can positively impact on public health outcomes, including reductions in social isolation and/or loneliness; improved nutrition and hydration; increased wellbeing for residents through participating in activities and linking with local communities.

What Happens Next:

66. If Cabinet approve the recommendations in this report, we will:

- i. We will implement the Right Homes, Right Support: Residential and Nursing Care Delivery Strategy.
- ii. We will undertake the necessary RIBA Stage 0 Strategic Definition Studies and RIBA Stage 1 Feasibility Studies, and market engagement across the whole Council owned care home portfolio to enable a strategic business case to be developed.

- iii. We will commence any necessary public consultations on the proposed future use of the sites. This will ensure that the voices of stakeholders, such as residents, families, carers, staff, and the wider community, are listened to and considered.
- iv. We will present to Cabinet a strategic business case for approval at a later date, subject to the outcomes of the market engagement, public consultation, RIBA Stage 0 Strategic Definition Studies and RIBA 1 Feasibility Studies, commercial analysis, procurement strategy and financial sustainability of our plans.

Report Author:

Katie Newton, Senior Commissioning Manager – Older People’s Commissioning Team
Katie.newton@surreycc.gov.uk 07805 815 045

Consulted:

Sinead Mooney, Cabinet Member for Adults, Wellbeing and Health Partnerships
 Natalie Bramhall, Cabinet Member for Property, Waste, and Infrastructure
 Claire Edgar, Executive Director, Adults, Wellbeing and Health Partnerships
 Simon Crowther, Interim Executive Director Environment, Property and Growth
 Jonathan Lillistone, Director of Integrated Commissioning, Adults, Wellbeing and Health Partnerships
 Diane Wilding, Director Land and Property
 Surrey County Council’s Adults and Health Select Committee
 Surrey County Council’s Corporate Leadership Team
 Surrey County Council’s Finance Team
 Surrey County Council’s Legal Team
 The residential care and nursing provider market
 Surrey County Council Operational Teams & Surrey Heartlands Operational Staff

Annexes:

Annex 1 – Surrey County Council Residential Care Home Portfolio
 Annex 2 – Residential and Nursing Care: ‘Homes for the future’
 Annex 3 – Residential and Nursing Projected Demand Modelling
 Annex 4 – Residential and Nursing Care Strategy Equality Impact Assessment

Sources/background papers:

Adult Social Care Accommodation with Care and Support Strategy for Extra Care Housing for Older People and Independent Living Schemes for adults with a learning disability and/or autism
<https://mycouncil.surreycc.gov.uk/ieListDocuments.aspx?CIId=120&MIId=6328&Ver=4>

Community Vision for Surrey in 2030 <https://www.surreycc.gov.uk/council-and-democracy/finance-and-performance/vision-strategy-and-performance/our-organisation-strategy/community-vision-for-surrey-in-2030>

Joint Strategic Needs Assessment (JSNA) for Surrey's Population
https://public.tableau.com/app/profile/surrey_public_health_intelligence_and_insight_team/viz/JSNA_Surrey_population_published/Currentpopulationestimates

Living Well in Later Life: Older People's Commissioning Strategy 2021 – 2030 [Living Well in Later Life - Older People's Commissioning Strategy 2021-2030](#)

Older People's Residential and Nursing Care Home – Market Position Statement
https://www.surreycc.gov.uk/_data/assets/pdf_file/0019/330166/MarketPositioningStatementv2.pdf

Strength Based Approach <https://www.scie.org.uk/strengths-based-approaches/guidance/>

Annex 1: Surrey County Council Residential Home Portfolio

Provider	Home Name	Registered Bed	Care Contract End	Lease End
Care UK	Appleby House	75	7 January 2027	7 January 2027
	Broadwater Lodge	67		
	Echelforde	50		
	Kingsleigh	67		
	Stanecroft	50		
	Tiltwood	50		
	Whitebourne	66		
		425		

Annex 1: Surrey County Council Residential Home Portfolio

Provider	Home Name	Registered Bed	Care Contract End	Lease End
Anchor	Eastlake	53	Individual placement agreements per resident	31 March 2028
	Glendale	61		
	Greenacres	62		
	Limegrove	55		
	Linwood	67		
	Oakleigh	51		
	Ridgemount	66		
	Thameside	61		
	The Beeches	54		
		530		

Annex 2: Residential and Nursing Care – 'Homes for the future'

Current Service Provision

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- Residential (low level)
- Residential Dementia
- Respite Planned



'Homes for the futures'

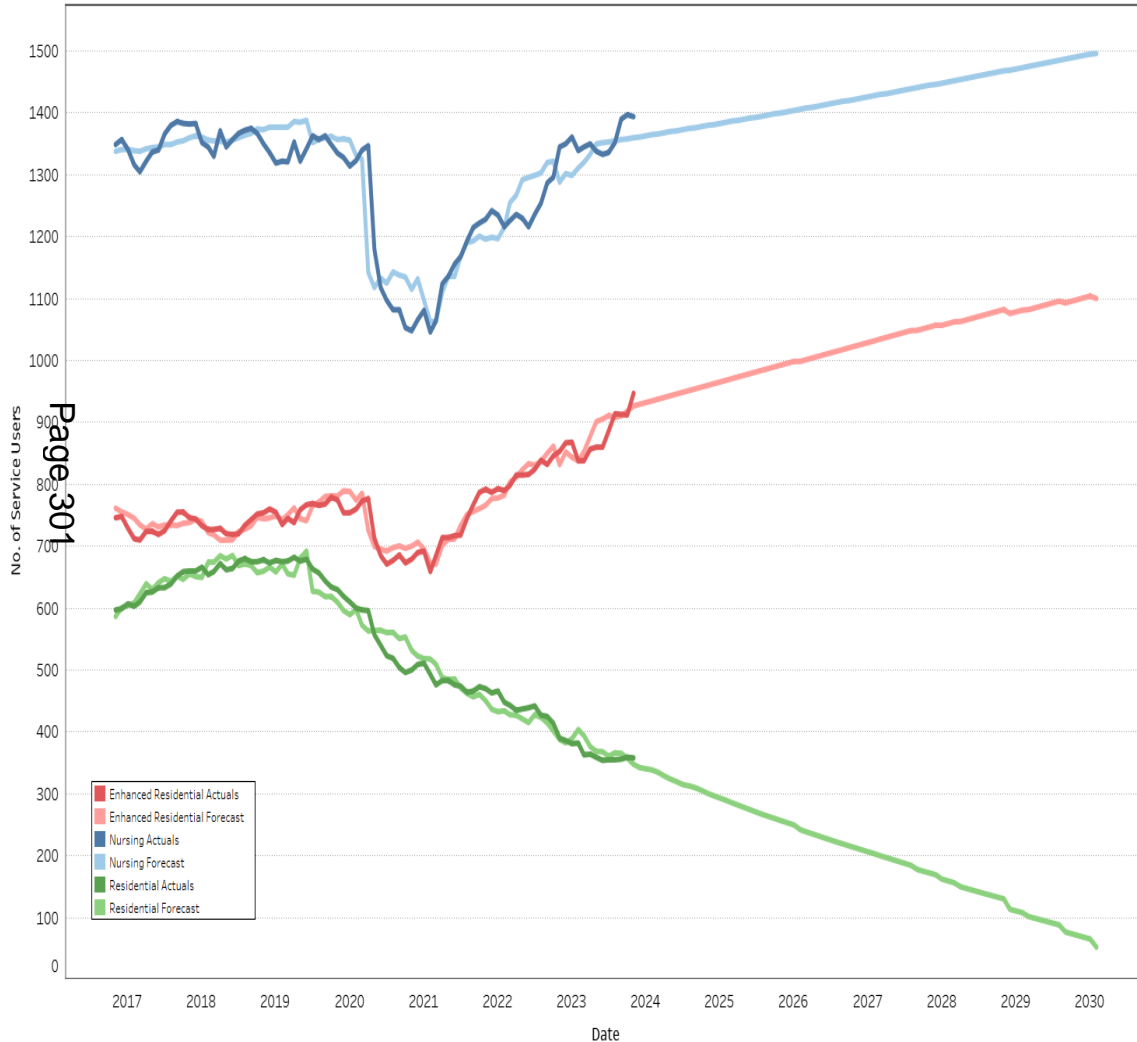
- Residential (low level)
- Enhanced Residential (dementia)
- General & Enhanced Nursing (dementia)



- CHC Funded Nursing
- Planned and Urgent Respite
- Reablement
- Rehabilitation
- Step Down / Step Up
- Discharge to Recover and Assess (D2RA)
- Winter Pressures
- Bariatric
- Working Age Adults – Early Onset Dementia
- Learning Disabilities – Residential Care
- Technology Enabled Care

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Annex 3: Residential and Nursing Projected Demand Modelling



A model has been generated to forecast the number of council funded care home beds required by Surrey's Older People population up to 2030. The model explores the relationship between the number of care home beds needed previously and several variables, such as the Older Person population, health of the Older Peoples population, the response to Covid-19, and the prevalence of other care services available. By quantifying these relationships, it is then able to project forward what the future demand will look like.

The forecasts predict continued growth of the residential enhanced and nursing placements, and further decline of general residential placements.

Demand for general residential care is decreasing as more people opt for home-based care, Extra Care Housing or community services until their needs require more formal care settings.

There is an opportunity for the Council to shift some of the focus and resources away from traditional residential care home beds in the future, to support more residents with increasingly complex physical or medical care needs.

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Older People's Residential and Nursing Care Homes, New Service Delivery Strategy

Did you use the EIA Screening Tool? No

1. Explaining the matter being assessed

14

Is this a:

- Change to a service or function

Summarise the strategy, policy, service(s), or function(s) being assessed. Describe current status followed by any changes that stakeholders would experience.

Now and in the coming years, Surrey County Council (SCC) faces unprecedented financial challenges to meet requirements with the increase in complex care and support needs and the changing demand for older people's residential and nursing care placements. The nature of the Surrey residential and nursing care home market adds complexity to these challenges as it is typified by a self-funder focused offer aimed at those with the means and willingness to pay for their care at levels above what is affordable and sustainable for SCC. With approximately 70% of current provision is focused on the self-funder market this also influences providers' willingness to support people with more complex care needs.

The Residential and Nursing Care Delivery Strategy, part of the Right Homes, Right Support Programme and the Transformation Programme will respond to these challenges by meeting the following objectives:

- Enable independence for as long as possible through several delivery programmes that will play a key role in the prevention of early admissions into acute hospitals and into long term care home provision.
- Ensure that there is enough affordable care home provision available to meet Surrey's increasing older people's (OP) population, demand for complex mental health needs and complex physical frailty, as well as supporting reablement capacity.
- Improve the offer of training and support to providers/staff to improve quality and outcomes for all residents receiving care by enabling providers to deliver services that meet the increase in demand and complex needs.
- Manage the exit strategy of the long-standing contracts and lease agreements with Care UK and Anchor that end in 2027 and 2028 respectively, ensuring that existing residents, carers and staff face minimal impact.

Older people's residential and nursing care home provision is focused on providing accommodation based services tailored to address the care and support requirements of individuals who may no longer be able to live independently in their own homes. This could be for a range of reasons including long term conditions, disability that requires health and social care input along with a broad range of age related frailty support needs.

Equality Impact Assessment

Residential care homes offer a non-clinical supportive environment where residents receive assistance with daily activities like personal care, meals, and social engagement, fostering a sense of community while ensuring their well-being outcomes are being met. This service can support different levels of residential needs, however, there has been an increase in complex mental health needs' specifically referring to people with mental health conditions including dementia, functional mental health problems and behaviour that challenges.

Conversely, nursing care homes provide support to similar levels of complex residents with the additional level of clinical supervision, with round-the-clock nursing staff managing differing levels of health needs and offering rehabilitative or palliative care as necessary.

This EIA helps us to build up a profile of the existing users of residential and nursing care in Surrey, and from this profile consider how both current and future users of residential and nursing care may be affected by the Residential and Nursing Care Delivery Strategy.

The anticipated impacts will be assessed with regard to those with protected characteristics, as identified under the Equality Act 2010. This is to identify actions to, where possible, minimise any potential negative impacts, maximise positive impacts associated with the Residential and Nursing Care programme and address issues and challenges that may arise.

The strategy provides information on the 16 care homes where SCC own the buildings and land which are currently leased out to Care UK until January 2027 and Anchor until March 2028. Adults, Wellbeing and Health Partnerships (AWHP) currently commissions a block contract to Care UK (293 beds) and individual spot placements to Anchor to both deliver residential and residential dementia care from these homes. Any changes to services will severely impact on the residents living in these homes with any future changes to the contracts or buildings that may take place.

In preparation for this long term contract coming to an end SCC is now needing to work through a strategic change process to ensure future provision is able to meet current and projected need. While this is a complex transformation programme it presents the council with an opportunity to consider the future shape of its assets and services for the benefit of local residents. Service needs and policy priorities will have changed since the initial contracts/leases were established. New contracts and buildings can incorporate new technology, structures and standards that have evolved since 2002 when provision was established.

All future considerations are dependent on approval from Cabinet and subject to the outcome of a full public consultation.

The proposals will affect:

- Future residents that will require residential and care home service provision, their relatives, and carers.
- Current residents residing in the 16 Care UK and Anchor Homes where there are four options for the sites:
 1. Retain as-is
 2. Refurbish
 3. Redevelop
 4. Release
- Current staff and providers working within the Care UK and Anchor homes. These care provider staff groups are highly valued and do an excellent job in providing care and support to residents and their families/carers. As the employers, Care UK and Anchor will

Equality Impact Assessment

be responsible for assessing any potential equality impacts on their staff. Adults Health and Wellbeing Partnerships (AHWP) commissioning and communications teams will work closely with Care UK and Anchor to engage with their staff, ensuring that there is minimal impact on service delivery.

How does your service proposal support the outcomes in [the Community Vision for Surrey 2030](#)?

The delivery of high quality, sustainable and affordable residential and nursing care home provision to support over 65+ adults is vital for SCC to deliver the Community Vision for 2030.

The Older People's (65+) Residential and Nursing Care Home Delivery Strategy focuses on ensuring that there is the right care home provision available for the increasing Surrey population. As well as meeting the increased demand for complex mental health needs and complex physical frailty.

This strategy will support following ambitions from the Community Vision for Surrey 2030:

- 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.
- Residents live in clean, safe, and green communities, where people and organisations embrace their environmental responsibilities.
- Everyone has a place they can call home, with appropriate housing for all.

Are there any specific geographies in Surrey where this will make an impact?

- County-wide

Assessment team – A key principle for completing impact assessments is that they should not be done in isolation. Consultation with affected groups and stakeholders needs to be built in from the start, to enrich the assessment and develop relevant mitigation.

Detail here who you have involved with completing this EIA:

- Residential & Nursing Care Project Team – made up of Commissioning, Land & Property, Special Projects, Communications, Legal and Procurement
- Locality Senior Manager

2. Service Users / Residents

Age including younger and older people

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

Surrey's population in 2021 was recorded at 1,208,400. According to the Joint Strategic Needs Assessment (JSNA), Surrey has an increasingly ageing population with a life expectancy above the national average for both men and women. 230,000 people in Surrey are over the age of 65 with an expected growth to 270,000 people by 2030, with the largest growth expected in the number of people who are 85+.

Whilst rising life expectancy is a cause for celebration, inevitably longer lives can mean that more Surrey residents will potentially need some form of care and support at some point in their life. There are also changes in the structure of our society which mean that increasingly older people are living alone with less family support. The average age for residents living in Surrey's older people's care homes is 85 years old.

Multimorbidity and frailty (which commonly coexist) contribute to more complex care needs for residents. We estimate that there are around 90,000 residents aged 65 and over with multiple morbidity and 22,000 with frailty. In addition, there is an increasing number of children and younger adults with highly complex needs surviving into older age. One of the morbidities closely linked to the provision of care and support is dementia, associated with an ongoing decline of brain function. Dementia is most common amongst older people and in Surrey it is estimated that between 2020 and 2030 the overall number of people with dementia is forecast to increase by 28%, from 17,700 to 22,672.

As of July 2024, the breakdown by age of those living in SCC-funded placements in Residential & Nursing Care Homes in Surrey, is as follows, with 80-89 years making up the most significant age group:

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Age	No. of SCC-funded Service Users in all R&N Care Homes
60 to 69 years	406
70 to 79 years	815
80 to 89 years	1,256
90 to 99 years	859
100 to 109 years	69
110+ years	<5

We will work with Care UK and Anchor to capture the self-funder data throughout consultation to further inform this Equality Impact Assessment.

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

Impacts Identified	How will you maximise positive / minimise negative impacts?	When will this be implemented by?	Owner
<p>Positive impact (option 1):</p> <p>No change to environment or routines creates short-term stability for older people currently living in Care UK and Anchor sites.</p>	n/a		

<p>Negative impact (option 1):</p> <p>If the assets and services are not redesigned around the increasing needs of the population, there may not be sufficient care home provision to meet the demand of future residents with more complex health needs.</p>	<p>Work with the existing care home market to increase capacity in order to meet the need.</p>	<p>Ongoing</p>	<p>Older people commissioning</p>
<p>Negative impact (option 1):</p> <p>Considering the age of some of the sites and in the event of potential infrastructure failure in buildings, residents may need to move to a different home in an emergency. Concern about the impact any move would have on the health and wellbeing of older people if done with urgency, without enough planning and phased movement etc.</p>	<p>Business continuity plans in place. Review annually.</p> <p>Carry out condition surveys and building reviews to assess building infrastructure, risk of infrastructure failure, and ensuring building standards and regulatory requirements are being met. Carry out feasibility surveys for refurbish/redevelop plans.</p>	<p>Ongoing</p>	<p>Commissioning Lead, Land and Property Team and Provider</p>

Equality Impact Assessment

<p>Negative impact (option 1):</p> <p>Residents may have to move to a different home as the homes may not be able to meet their-increase in needs as they grow older because of the layout of the buildings and the current care services provided. Older people may therefore need to be moved when they are more frail.</p>	<p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p>	<p>Ongoing</p>	<p>Locality teams and Provider</p>
<p>Negative impact (option 1):</p> <p>It will continue to be difficult to provide privacy and dignity as non-gender specific shared bathroom and toilet facilities will remain for older people with no ensuite facilities.</p>	<p>Continue to treat residents with respect and dignity.</p>	<p>Ongoing</p>	<p>Quality Assurance Manager, Locality teams and Provider</p>
<p>Negative impact (option 1):</p> <p>The control of infectious viruses and diseases will continue to be a challenge to manage as older</p>	<p>Regular review of practice to ensure guidelines are being followed to minimise the risk of infections spreading.</p>	<p>Ongoing</p>	<p>Quality Assurance Manager and Provider</p>

<p>residents share bathroom facilities.</p>			
<p>Positive impact (option 2):</p> <p>Opportunity to improve outcomes for older residents (including helping them thrive relationally and actively) through upgraded facilities and alternative services.</p>	<p>Co-design and engagement to understand what people value about care to inform care home design and service specification development.</p> <p>Formal public consultation to have informed discussions with residents and their families/carers on the different options</p> <p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p>	<p>Jan-April 2025</p> <p>May-August 2025</p> <p>Ongoing</p>	<p>Older People Commissioning</p> <p>Locality Teams</p>
<p>Positive impact (options 2 and 3):</p> <p>Refurbished and/or redeveloped care homes will meet the needs of a high number of older people (in some homes) over the age of 85, particularly for those with complex mental health needs specifically referring to people with mental health conditions including dementia, functional mental health</p>	<p>Continuation of demand and commercial modelling to inform the provision of ASC-funded beds and number of nursing beds required to meet the need in Surrey.</p> <p>Development of a new care specification to improve outcomes for older people with experts in the provider market, operational colleagues and commissioning.</p>	<p>Ongoing</p> <p>Jan 2025 onwards</p>	<p>Older People Commissioning, Provider Experts and Operational Colleagues</p>

Equality Impact Assessment

<p>problems and behaviour that challenges.</p>			
<p>Negative impact (option 2):</p> <p>Short-term disruption to routines, activities and visiting for elderly residents of prolonged building work conducted whilst they are still living at the home. Worry and distress of living with noise, dust and workmen in their home.</p>	<p>Implement phased plans across the care homes / care home refurbishment to move clients to alternative units / homes whilst work is being done.</p>	<p>In line with implementation plan</p>	<p>Commissioning, Locality teams and Provider</p>
<p>Positive impact (option 3):</p> <p>Potential to improve outcomes for older residents through new buildings and provision of alternative services, integrated within the building space.</p>	<p>Co-design and engagement to understand what people value about care to inform care home design and service specification development.</p> <p>Formal public consultation to have informed discussions with residents and their families/carers on the different options</p> <p>Development of a new care specification to improve outcomes for older people with experts in the provider market, operational colleagues and commissioning.</p>	<p>Jan-April 2025</p> <p>May-August 2025</p> <p>January 2025 onwards</p>	<p>Older People Commissioning</p>

<p>Positive impact (option 3):</p> <p>New care home buildings will provide more suitable environments for older people such as larger bedrooms to enable more space for staff and equipment use and ensuite facilities in all bedrooms.</p>	<p>Development of the Generic Design Brief with input from practitioners, industry experts and residents.</p> <p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p>	<p>Jan-April 2025</p> <p>Ongoing</p>	<p>Land & Property</p> <p>Commissioning</p> <p>Locality Teams</p>
<p>Positive impact (option 3):</p> <p>Residents being able to have a 'home for the future' as they grow older through their room and home adapting to their changing needs (e.g. from residential to nursing) and a service specification that is flexible to meet increases in demand.</p>	<p>Development of the Generic Design Brief with input from practitioners, industry experts and residents.</p> <p>Development of a new care specification to improve outcomes for older people with experts in the provider market, operational colleagues and commissioning.</p> <p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p>	<p>Ongoing</p> <p>Ongoing</p>	<p>Land & Property and Commissioning</p> <p>Commissioning and expert provider market</p> <p>Locality Teams and Provider</p>
<p>Negative impact (option 3):</p> <p>Short-term disruption of moving older residents.</p> <p>Concern about the impact</p>	<p>Learn from research and best practice from other home closures in Surrey and nationally.</p>	<p>Ongoing</p>	<p>Commissioning, Brokerage and Locality Teams</p>

Equality Impact Assessment

<p>any move would have on the health and wellbeing of older people.</p>	<p>Consider reducing placements to care homes 18 months prior to any redevelopment works taking place, based on the average length of stay (LOS) in care homes.</p> <p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p>	<p>In line with implementation plan.</p>	
<p>Negative impact (option 4):</p> <p>Demand for ASC funded services will increase with Surrey's ageing population. More affordable provision is needed for older people and there may be challenges in identifying a suitable alternative placement in the wider market.</p>	<p>Continuation of demand and commercial modelling to inform the provision of ASC-funded beds and number of nursing beds required to meet the need in Surrey.</p> <p>Work with the existing care home market to increase capacity in order to meet the need.</p>	<p>Ongoing</p>	<p>Older People Commissioning</p>

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?

- Focus on early intervention and prevention services and information and advice to ensure care home placements are only accessed when other home-based care and community services have been reviewed that meet residents' needs.
- SCC is currently developing an alternative tenure type that delivers care and support services, Extra Care Housing. This will be offered to residents who have a lower level of needs and can continue to live independently.

- The centralised brokerage team draws on the shared knowledge of Surrey as a whole to be able to better meet resident's individual needs, including relating to the equalities protected characteristics.

Any negative impacts that cannot be mitigated?

n/a

Equality Impact Assessment

Disability

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

There are a range of support needs including; personal care, memory and cognition, physical and sensory impairments and learning difficulties. A significant percentage of residents have dementia both diagnosed and undiagnosed.

As of July 2024, 65% of SCC-funded “Older People” client group living in ASC placements in R&N homes, have personal care support needs, and almost a quarter of clients require support with their memory and cognition.

Latest Primary Support Reason	No. of SCC-funded Service Users in all R&N Care Homes
Learning Disability Support	9
Mental Health Support	257
Physical Support - Access and Mobility Only	115
Physical Support - Personal Care Support	1,987
Sensory Support - Support for Dual Impairment	<5
Sensory Support - Support for Hearing Impairment	<5
Sensory Support - Support for Visual Impairment	8
Social Support - Substance Misuse Support	<5
Social Support - Support for Social Isolation / Other	18
Social Support - Support to Carer	0
Support with Memory and Cognition	455

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

Impacts Identified	How will you maximise positive / minimise negative impacts?	When will this be implemented by?	Owner
<p>Positive impact (option 1):</p> <p>No change to environment or routines creates stability for people with disabilities.</p>	<p>n/a</p>		
<p>Negative impact (option 1):</p> <p>In the event of infrastructure failure, residents that require support physically for personal care, memory and cognition and mental health support may become agitated if they need to move to a different home quickly in an emergency. Concern about the impact any move would have on the health and wellbeing of an individual with a disability.</p>	<p>Business continuity plans in place. Reviewed annually.</p> <p>Carry out condition surveys and building reviews to assess building infrastructure, risk of infrastructure failure, and ensuring building standards and regulatory requirements are being met. Carry out feasibility surveys for refurbish/redevelop plans.</p>	<p>Ongoing</p>	<p>Commissioning Lead, Land and Property Team and Provider</p>
<p>Negative impact (option 1):</p> <p>Some residents with disabilities may need to move out of the homes if their changing needs mean they need equipment such</p>	<p>Training is provided to staff to encourage good practice when moving or handling residents. If care and support needs cannot safely be met, residents should be assessed and transferred to</p>	<p>Ongoing</p>	<p>Quality Assurance Manager, Locality Teams, Provider and Commissioning</p>

Equality Impact Assessment

<p>as hoists which cannot be accommodated because of the small room sizes/potential ceiling structure. Would remain challenging to accommodate and use specialist equipment in small rooms.</p>	<p>a care setting that can meet their assessed needs.</p>		
<p>Negative impact (option 1): Residents with dementia and visual and physical impairments may be at risk of injury due to the built environment of the sites, e.g. non-sighted areas due to subsequent building extensions.</p>	<p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p>	<p>Ongoing</p>	<p>Locality Teams, Provider and Commissioning</p>
<p>Positive impact (option 2): Residents with a disability may be able to remain in the home whilst the building work is completed causing less disruption.</p>	<p>Implement phased plans across the care homes / care home refurbishment to move clients to alternative units / homes whilst work is being done.</p>	<p>Ongoing</p>	<p>Commissioning, Land and Property, Locality Teams and Brokerage</p>
<p>Negative impact (option 2): Residents with physical or cognitive impairments may struggle to cope with the noise and potential changes to routine that living with prolonged building work may cause.</p>	<p>Implement phased plans across the care homes / care home refurbishment to move clients to alternative units / homes whilst work is being done.</p> <p>Consider reducing placements to care homes 18 months prior to any redevelopment works taking place, based on the average length of stay (LOS) in care homes.</p>	<p>Ongoing</p>	<p>Commissioning, Land and Property, Locality Teams and Brokerage</p>

<p>Positive impact (option 3):</p> <p>More capacity for clients who present with complex mental health needs and complex physical frailty.</p>	<p>Co-design and engagement to understand what people value about care to inform care home design and service specification development.</p> <p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p> <p>Development of a new care specification to improve outcomes for older people with experts in the provider market, operational colleagues and commissioning.</p>	<p>Ongoing</p>	<p>Older People Commissioning and Locality Teams</p>
<p>Positive impact (option 3):</p> <p>Potential to improve outcomes for older people with disabilities (including sensory impairments) through alternative services, such as assistive technology.</p>	<p>Co-design and engagement to understand what people value about care to inform care home design and service specification development.</p> <p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p> <p>Development of a new care specification to improve outcomes for older people with experts in the provider market, operational colleagues and commissioning.</p> <p>Support providers to deliver awareness training to staff on how to support residents with sensory impairments.</p>	<p>Ongoing</p>	<p>Older People Commissioning</p>

Equality Impact Assessment

<p>Positive impact (option 3):</p> <p>Residents with a disability being able to have a ‘home for the future’, with a home that is fit-for-purpose as their needs change e.g. transitioning smoothly to nursing. Larger rooms can adapt to their equipment needs e.g. hoists and specialist equipment. Technology enabled environments ensure that different technology can be added as required.</p>	<p>Co-design and engagement to understand what people value about care to inform care home design and service specification development.</p> <p>Formal public consultation to have informed discussions with residents and their families/carers on the different options.</p> <p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p> <p>Development of a new care specification to improve outcomes for older people with experts in the provider market, operational colleagues and commissioning.</p>	<p>Jan-April 2025</p> <p>May-August 2025</p>	<p>Older People Commissioning and Technology Enabled Care</p>
<p>Positive impact (option 3):</p> <p>A more specialist environment may be beneficial to those with dementia e.g. open lines of sight.</p>	<p>Co-design and engagement to understand what people value about care to inform care home design and service specification development.</p> <p>Formal public consultation to have informed discussions with residents and their families/carers on the different options.</p> <p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p> <p>Development of a new care specification to improve outcomes for older people with experts</p>	<p>Jan-April 2025</p> <p>May-August 2025</p>	<p>Older People Commissioning</p>

	in the provider market, operational colleagues and commissioning.		
<p>Positive impact (option 3):</p> <p>Some disability related needs are better met in different environments. Larger bedrooms, reinforced ceilings, en-suite facilities, closed staircases, assistive technology in new care homes may mean buildings can better cater for residents' needs.</p>	<p>Co-design and engagement to understand what people value about care to inform care home design and service specification development.</p> <p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p>	Jan-April 2025	Older People Commissioning and Land and Property colleagues
<p>Positive impact (option 3):</p> <p>Greater accessibility and mobility for people with a disability through wider doorframes, wider corridors, accessible outdoor spaces, secure entrances and central communal areas.</p>	<p>Co-design and engagement to understand what people value about care to inform care home design and service specification development.</p> <p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p>	Jan-April 2025	Older People Commissioning
<p>Negative impact (option 3):</p> <p>Residents with learning disabilities, sensory impairments or difficulties with</p>	<p>Transition planning and any resident moves will include a plain English communications plan, translation services and involve current care home staff and families/carers.</p>	Ongoing	Older People Commissioning

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<p>memory/cognition may struggle to adjust to their new environment.</p>	<p>Adult Social Care team locality staff would plan to review new placements after 6 weeks.</p>		
<p>Negative impact (option 4): Lack of available local affordable provision, particularly for those with a disability.</p>	<p>Continuation of demand and commercial modelling to inform the provision of ASC-funded beds and number of nursing beds required to meet the need in Surrey. Work with the existing care home market to increase capacity in order to meet the need.</p>	<p>Ongoing</p>	<p>Older People Commissioning</p>

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?

- Focus on early intervention and prevention services and information and advice to ensure care home placements are only accessed when other home-based care and community services have been reviewed that meet residents' needs.
- Introduction of another tenure and care type for older people – Extra Care Housing, which would offer an alternative accommodation and care offer that could suit an individual's needs better.
- The centralised brokerage team draws on the shared knowledge of Surrey as a whole to be able to better meet resident's individual needs, including relating to the equalities protected characteristics.

Any negative impacts that cannot be mitigated?

n/a

Equality Impact Assessment

Gender reassignment

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

The considerations and concerns for this equality group, will be based on the Surrey-wide population data gathered in the 2021 Census.

A total of 918,205 residents aged 16+ (94.42%) answered “Yes”, indicating that their gender identity was the same as their sex registered at birth. A total of 3,628 residents (0.37%) answered “No”, indicating that their gender identity was different from their sex registered at birth. Within this group:

- 1,361 (0.14%) answered “No” but did not provide a write-in response
- 731 (0.08%) identified as a trans man
- 756 (0.08%) identified as a trans woman
- 495 (0.05%) identified as non-binary
- 287 (0.03%) wrote in a different gender identity

There is no gender identity data available for residents living in the R&N homes across Surrey.

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

Impacts Identified	How will you maximise positive / minimise negative impacts?	When will this be implemented by?	Owner
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<p>Positive impact (options 1, 2, 3, 4):</p> <p>Residents will want assurance that their needs will be met by the care worker and home in the way they wish to be identified.</p>	<p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p> <p>Development of a new care specification to improve outcomes for older people with experts in the provider market, operational colleagues and commissioning.</p> <p>Support providers to deliver EDI-focused cultural competency training for care workers. This can ensure they are sensitive to diverse backgrounds when providing care. This will also cover the specific needs and challenges older LGBTQ+ people may face. This training should cover how to provide care without making assumptions and how to treat everyone with respect.</p> <p>Ensure staff know how to handle sensitive information about a resident's gender identity and sexuality respectfully and keep it confidential.</p> <p>Display LGBTQ+ symbols, like rainbow flags, to show the care setting is a safe and welcoming space for everyone. Encourage residents to feel comfortable being themselves.</p> <p>When creating care plans, ask about the resident's preferences related to gender, pronouns, and care. Understand any family situations or past experiences with discrimination.</p>	<p>Ongoing</p>	<p>Older people commissioning</p>
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Equality Impact Assessment

	Partner with local LGBTQ+ organisations for guidance and support to make sure we're using the best practices for inclusive care.		
<p>Negative Impact (options 2 & 3):</p> <p>Residents may have formed strong bonds and connections with staff members that understand their gender reassignment. Potential move to a new home could lead to emotional distress and anxiety with the new staff team.</p>	<p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p> <p>Support providers to deliver EDI-focused cultural competency training for care workers. This can ensure they are sensitive to diverse backgrounds when providing care.</p>	On going	Locality Teams and Brokerage

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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?

- Introduction of another tenure and care type for older people – Extra Care Housing, which would offer an alternative accommodation and care offer that could suit an individual's needs better.
- The centralised brokerage team draws on the shared knowledge of Surrey as a whole to be able to better meet resident's individual needs, including relating to the equalities protected characteristics.

Any negative impacts that cannot be mitigated?

n/a

Pregnancy and Maternity

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

Some families/carers visiting residents may be pregnant and/or raising infants, and their needs have been considered.

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

Impacts Identified	How will you maximise positive / minimise negative impacts?	When will this be implemented by?	Owner
<p>Positive impact (option 2):</p> <p>The retrofitting of ensuites/wet rooms in rooms will be helpful for family/carers who require facilities for baby changing.</p>	<p>Co-design and engagement to understand what people value about care to inform care home design and service specification development.</p> <p>Development of a new care specification to improve outcomes for older people with experts in the provider market, operational colleagues and commissioning.</p>	Jan-April 2025	Older People Commissioning
<p>Positive impact (option 3):</p> <p>The needs of pregnant family/carers and those caring for infants can be considered when designing new care home provision for the future. Ensuring care homes are welcoming and inclusive for the wider community will benefit residents.</p>	<p>Co-design and engagement to understand what people value about care to inform care home design and service specification development.</p> <p>Development of a new care specification to improve outcomes for older people with experts in the provider market, operational colleagues and commissioning.</p>	Jan-April 2025	Older People Commissioning

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<p>Positive impact (option 3):</p> <p>Accessible site locations with various transport connections and adequate space for parking for family/carers who may be pregnant or have infants.</p>	<p>Co-design and engagement to understand what people value about care to inform care home design and service specification development.</p> <p>Development of a new care specification to improve outcomes for older people with experts in the provider market, operational colleagues and commissioning.</p>	<p>Jan-April 2025</p>	<p>Older People Commissioning and Land and Property colleagues</p>
<p>Negative impact (options 3, 4):</p> <p>Families/carers who are pregnant/with young children may be required to travel further to a temporary or new care home to visit their loved one.</p>	<p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p>	<p>Ongoing</p>	<p>Locality Teams</p>

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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?

n/a

Any negative impacts that cannot be mitigated?

n/a

Race including ethnic or national origins, colour or nationality

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

The representation of different ethnic groups across SCC-funded “older people” placements in Surrey’s residential & nursing care homes, is as follows:

Equality Impact Assessment

Ethnicity	No. of Service Users in all R&N Care Homes
White British	2,440
Information Refused, Not Stated, Undeclared	164
White Any Other White Background	111
White Irish	43
Oth Ethnic Group	32
Asian/Asian British Indian	18
Black/Black British Caribbean	17
Asian/Asian British Any Other Asian Background	12
Mixed Any Other Mixed Background	5
Black/Black British Any Other Black Background	<5
Arab	<5
Asian/Asian British Bangladeshi	<5
Black/Black British African	<5
Chinese	<5
Asian/Asian British Pakistani	<5
Mixed White & Asian	<5
Mixed White & Black African	<5
Mixed White & Black Caribbean	0
White Gypsy/Roma	0

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

Impacts Identified	How will you maximise positive / minimise negative impacts?	When will this be implemented by?	Owner
<p>Negative impact (option 1):</p> <p>In the event of infrastructure failure, residents with English as a second language may find it harder to cope if they need to move to a different home in an emergency and a change to the current staff that have been supporting residents. Concern about the impact any move would have on the health and wellbeing of an individual.</p>	<p>Transition planning and any resident moves will include a plain English communications plan, translation services and involve current care home staff and families/carers.</p> <p>Adult Social Care team locality staff would plan to review new placements after 6 weeks.</p>	<p>Ongoing</p>	<p>Commissioning, locality teams and Brokerage</p>
<p>Positive impact (option 2 & 3):</p> <p>The inclusion of en-suite facilities will be welcomed by those uncomfortable sharing bathroom facilities because of their cultural background.</p>	<p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p>	<p>Ongoing</p>	<p>Commissioning, locality teams and Brokerage</p>

Equality Impact Assessment

<p>Positive impact (option 3):</p> <p>Opportunities to create links with local community e.g. schools and community groups in order to create positive outcomes for clients.</p>	<p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p> <p>Engagement with local care market to understand local community services that can meet residents' needs.</p>	<p>Ongoing</p>	<p>Commissioning</p>
<p>Negative impact (option 3 & 4):</p> <p>Current care homes may be based or nearby to an individual's particular ethnic community. If the new/temporary home is not in the same vicinity it may have a negative impact on their general wellbeing as they may be unable to continue to access.</p>	<p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p> <p>Engagement with local care market to understand local capacity that can meet residents' needs.</p>	<p>Ongoing</p>	<p>Commissioning, locality teams and Brokerage</p>
<p>Negative impact (option 3 & 4):</p> <p>Residents with English as a second language may find it more difficult to form relationships with staff and other residents in a new/temporary home.</p>	<p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p> <p>Transition planning and any resident moves will include a plain English communications plan, translation services and involve current care home staff and families/carers.</p> <p>Brokerage team to use knowledge to match language needs to care home where there are staff members who speak the resident's first language.</p>	<p>Ongoing</p>	<p>Commissioning, locality teams and Brokerage</p>

	Support providers to deliver EDI-focused cultural competency training for care workers. This can ensure they are sensitive to diverse backgrounds, including race, religion, and sexual orientation, when providing care.		
<p>Negative impact (option 3 & 4):</p> <p>Residents' needs may not be fully met because of a language barrier between themselves and a new worker.</p>	<p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p> <p>Transition planning and any resident moves will include a plain English communications plan, translation services and involve current care home staff and families/carers.</p> <p>Brokerage team to use knowledge to match language needs to care home where there are staff members who speak the resident's first language.</p> <p>Engagement with local care market to understand local capacity that can meet residents' needs.</p>	Ongoing	Commissioning, locality teams and Brokerage
<p>Negative impact (option 3 & 4):</p> <p>Some residents may request that care is provided by workers from a specific ethnic group.</p>	<p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p> <p>Transition planning and any resident moves will include a plain English communications plan, translation services and involve current care home staff and families/carers.</p> <p>Engagement with local care market to understand local capacity that can meet residents' needs.</p>	Ongoing	Commissioning, locality teams and Brokerage

Equality Impact Assessment

	Support providers to deliver EDI-focused cultural competency training for care workers. This can ensure they are sensitive to diverse backgrounds, including race, religion, and sexual orientation, when providing care.		
<p>Negative impact: (option 3 & 4):</p> <p>Residents may have dietary and other requirements relating to their ethnic heritage which care providers will need to be aware of and respond to.</p>	<p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p> <p>Engagement with local care market to understand local capacity that can meet residents' needs.</p> <p>Support providers to deliver EDI-focused cultural competency training for care workers. This can ensure they are sensitive to diverse backgrounds when providing care.</p>	Ongoing	Commissioning, locality teams and Brokerage

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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?

- Introduction of another tenure and care type for older people – Extra Care Housing, which would offer an alternative accommodation and care offer that could suit an individual's needs better.
- The centralised brokerage team draws on the shared knowledge of Surrey as a whole to be able to better meet resident's individual needs, including relating to the equalities protected characteristics.

Any negative impacts that cannot be mitigated?

n/a

Religion or belief including lack of belief

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

The picture of “older people” SCC-funded clients according to their religion and/or belief across Surrey’s residential & nursing care homes, is as follows:

Religion	No. of Service Users in all R&N Care Homes
Not Known / Declined	776
Christian and All Other Christian	618
Church of England/Anglican	605
None	337
Other & Other Religion or Belief	333
Catholic (Roman)	130
Jehovah Witness	15
Jewish	10
Muslim	10
Hindu	9
Buddhist	<5
Sikh	<5
Baha'i	<5
Mormon	<5
Personal Belief System	<5
Spiritualist	<5
Zoroastrian	<5

Equality Impact Assessment

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

Impacts Identified	How will you maximise positive / minimise negative impacts?	When will this be implemented by?	Owner
<p>Positive impact (option 1):</p> <p>Can retain link with local faith community e.g. if religious leader comes into current home to complete a service.</p>	<p>n/a</p>		
<p>Positive impact (option 3):</p> <p>Opportunity to create new links with the local faith community, particularly if this wasn't in place previously.</p>	<p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p> <p>Engagement with local care market to understand local capacity that can meet residents' needs.</p> <p>Development of a new care specification to improve outcomes for older people with experts in the provider market, operational colleagues and commissioning.</p>	<p>Ongoing</p>	<p>Commissioning</p>
<p>Negative impact (option 3 & 4):</p> <p>Loss of contact with local faith community if new/temporary</p>	<p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p> <p>Engagement with local care market to understand local capacity that can meet residents' needs.</p>	<p>Ongoing</p>	<p>Commissioning, Brokerage</p>

<p>care home is not in the same vicinity.</p>	<p>Support providers to respect residents’ religious practices, including providing a prayer space and ensuring religious dietary requirements are met.</p> <p>Development of a new care specification to improve outcomes for older people with experts in the provider market, operational colleagues and commissioning.</p>		
<p>Negative Impact (options 2 & 3):</p> <p>Residents may have formed strong bonds and connections with staff members that understand their religious beliefs. Potential move to a new home could lead to emotional distress and anxiety with the new staff team.</p>	<p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p> <p>Development of a new care specification to improve outcomes for older people with experts in the provider market, operational colleagues and commissioning.</p> <p>Support providers to respect residents’ religious practices, including providing a prayer space and ensuring religious dietary requirements are met.</p> <p>Support providers to deliver EDI-focused cultural competency training for care workers. This can ensure they are sensitive to diverse backgrounds when providing care.</p>	<p>Ongoing</p> <p>Ongoing</p>	<p>Locality Teams and Brokerage</p> <p>Commissioning</p>

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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?

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- Introduction of another tenure and care type for older people – Extra Care Housing, which would offer an alternative accommodation and care offer that could suit an individual's needs better.
- The centralised brokerage team draws on the shared knowledge of Surrey as a whole to be able to better meet resident's individual needs, including relating to the equalities protected characteristics.

Any negative impacts that cannot be mitigated?

n/a

Sex

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

Almost 70% of “older people” SCC-funded residents are female across Surrey’s residential & nursing homes:

Gender	No. of SCC-funded Service Users in all R&N Care Homes
Female	1,963
Male	893

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

Impacts Identified	How will you maximise positive / minimise negative impacts?	When will this be implemented by?	Owner
<p>Negative impact (option 1):</p> <p>It will continue to be a challenge to ensure privacy and dignity as non-gender specific shared bathroom and toilet facilities will remain.</p>	Continue treating clients with respect and dignity.	Ongoing	Locality Teams

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<p>Negative impact (option 1, 2, 3, 4):</p> <p>Some residents may feel uncomfortable on mixed gender units.</p>	<p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p>	<p>Ongoing</p>	<p>Quality Assurance Manager and Locality Teams</p>
<p>Positive impact (option 2 & 3):</p> <p>Ensuite bathrooms are included within the Generic Design brief and would be included within any refurbishment and redevelopment of homes, providing residents with more privacy and dignity.</p>	<p>Co-design and engagement to understand what people value about care to inform care home design and service specification development.</p> <p>Formal public consultation to have informed discussions with residents and their families/carers on the different options.</p>	<p>Jan-April 2025</p> <p>May-August 2025</p>	<p>Older People Commissioning</p>

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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?

- Introduction of another tenure and care type for older people – Extra Care Housing, which would offer an alternative accommodation and care offer that could suit an individual’s needs better.
- The centralised brokerage team draws on the shared knowledge of Surrey as a whole to be able to better meet resident’s individual needs, including relating to the equalities protected characteristics.

Any negative impacts that cannot be mitigated?

n/a

Sexual orientation

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

Unfortunately, there is not adequate data to inform this protected characteristic, so assumptions have been made.

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

Impacts Identified	How will you maximise positive / minimise negative impacts?	When will this be implemented by?	Owner
<p>Positive impact (option 1, 2, 3, 4):</p> <p>Residents may want assurance that their needs will be met by the care worker and home in a way they wish to be identified</p>	<p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p> <p>Support providers to deliver EDI-focused cultural competency training for care workers. This can ensure they are sensitive to diverse backgrounds when providing care. This will also cover the specific needs and challenges older LGBTQ+ people may face. This training should cover how to provide care without making assumptions and how to treat everyone with respect.</p> <p>Ensure staff know how to handle sensitive information about a resident's gender identity and sexual orientation respectfully and keep it confidential.</p> <p>Display LGBTQ+ symbols, like rainbow flags, to show the care setting is a safe and welcoming space for everyone. Encourage residents to feel comfortable being themselves.</p>	<p>On going</p>	<p>Locality Teams</p>

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	<p>When creating care plans, ask about the resident's preferences related to gender, pronouns, and care. Understand any family situations or past experiences with discrimination.</p> <p>Partner with local LGBTQ+ organisations for guidance and support to make sure we're using the best practices for inclusive care.</p>		
<p>Negative Impact (options 2 & 3):</p> <p>Residents may have form strong bonds and connections with staff members that understand their sexual orientation. Potential move to a new home could lead to emotional distress and anxiety with the new staff team.</p>	<p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p> <p>Support providers to deliver EDI-focused cultural competency training for care workers. This can ensure they are sensitive to diverse backgrounds when providing care.</p>	On going	Locality Teams and Brokerage

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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?

- Introduction of another tenure and care type for older people – Extra Care Housing, which would offer an alternative accommodation and care offer that could suit an individual's needs better.
- The centralised brokerage team draws on the shared knowledge of Surrey as a whole to be able to better meet resident's individual needs, including relating to the equalities protected characteristics.

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Any negative impacts that cannot be mitigated?

n/a

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Marriage/civil partnerships

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

Below is a breakdown of marital status for “older people” SCC-funded residents across Surrey’s residential and nursing homes. Unfortunately, marital status is unknown for the majority of clients.

There is reportedly less demand for couples who enter care homes wanting to share a room. Older people are coming into care homes later in life with more complex conditions, and it can prove more physically and emotionally challenging to share a room.

Married Status	No. of SCC-funded Service Users in all R&N Care Homes
No Data	1,269
Widowed	674
Married	527
Single	278
Divorced/Separated	90
Cohabiting	10
Civil Partnership	8

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

Impacts Identified	How will you maximise positive / minimise negative impacts?	When will this be implemented by?	Owner
Negative impact (option 1): Currently difficult to accept couples who may want to live	Formal public consultation to have informed discussions with residents and their families/carers on the different options.	May-August 2025	Older People Commissioning

<p>together in the home due to smaller rooms.</p>			
<p>Positive impact (option 2):</p> <p>May be opportunities to include provision for couples in refurbishment with larger bedrooms to support two beds.</p>	<p>Co-design and engagement to understand what people value about care to inform care home design and service specification development.</p> <p>Formal public consultation to have informed discussions with residents and their families/carers on the different options.</p>	<p>Jan-April 2025</p> <p>May-August 2025</p>	<p>Older People Commissioning</p>
<p>Positive impact (option 3):</p> <p>May be opportunities to include provision for couples in redevelopment with larger bedrooms to support two beds.</p>	<p>Co-design and engagement to understand what people value about care to inform care home design and service specification development.</p> <p>Formal public consultation to have informed discussions with residents and their families/carers on the different options.</p>	<p>Jan-April 2025</p> <p>May-August 2025</p>	<p>Older People Commissioning</p>
<p>Negative impact (option 3 & 4):</p> <p>The journey to any new/temporary home may be longer / more costly, making it difficult for partners to visit each other and stay in regular contact.</p>	<p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p> <p>Transition planning and any resident moves will include a plain English communications plan, translation services and involve current care home staff and families/carers.</p>	<p>Ongoing</p>	<p>Older People Commissioning, locality teams and Brokerage</p>

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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?

- Introduction of another tenure and care type for older people – Extra Care Housing. This would give more opportunities for couples to share accommodation together.

Any negative impacts that cannot be mitigated?

N/a

Carers by Association

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

This section has been used to identify impacts for families / carers of people using services. There are no data on numbers, but the majority of residents have relatives recorded as next of kin and receive regular visitors.

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

Impacts Identified	How will you maximise positive / minimise negative impacts?	When will this be implemented by?	Owner
<p>Positive impact (option 1):</p> <p>No change in location. Carers can continue their visits and contact.</p>	n/a		
<p>Negative impact (option 1):</p> <p>Considering the age of some of the sites and in the event of potential infrastructure failure in the buildings, residents may need to move to a different home in an emergency. Carers may not have the capacity to be involved in decisions around any new home.</p>	<p>Business continuity plans in place. Reviewed annually.</p> <p>Carry out condition surveys and building reviews to assess building infrastructure, risk of infrastructure failure, and ensuring building standards and regulatory requirements are being met. Carry out feasibility surveys for refurbish/redevelop plans.</p> <p>Transition planning and any resident moves will include a plain English communications plan, translation services and involve current care home staff and families/carers.</p>	Ongoing	Locality teams and Brokerage

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<p>Positive impact (option 3):</p> <p>Opportunity to look at more flexible options for short term, respite and emergency care, to support the health and wellbeing of carers.</p>	<p>Co-design and engagement to understand what people value about care to inform care home design and service specification development.</p>	<p>Jan-April 2025</p>	<p>Older People Commissioning</p>
<p>Positive impact (option 3):</p> <p>Accessible site locations with various transport connections and adequate space for parking for visiting carers.</p>	<p>Development of the Generic Design Brief with input from practitioners, industry experts and residents.</p>	<p>Ongoing</p>	<p>Older People Commissioning and Land & Property</p>
<p>Positive impact (option 3):</p> <p>Opportunity for new/temporary care home to be closer to family and friends.</p>	<p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p> <p>Transition planning and any resident moves will include a plain English communications plan, translation services and involve current care home staff and families/carers.</p>	<p>Ongoing</p>	<p>Locality teams and Brokerage</p>
<p>Negative impact (option 3):</p> <p>Journey to any new/temporary home may be more difficult/costly and may be harder for family/carers to stay in contact.</p>	<p>Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.</p> <p>Transition planning and any resident moves will include a plain English communications plan, translation services and involve current care home staff and families/carers.</p>	<p>Ongoing</p>	<p>Locality teams and Brokerage</p>

	Consider reducing placements to care homes 18 months prior to any redevelopment works taking place, based on the average length of stay (LOS) in care homes.		
<p>Negative impact (option 4):</p> <p>Concern of carers and relatives about losing a valued care home and having to rely on alternative homes. Concerns around the quality of alternative homes and whether needs can be fully met by them.</p>	<p>Transition planning and any resident moves will include a plain English communications plan, translation services and involve current care home staff and families/carers.</p> <p>Consider reducing placements to care homes 18 months prior to any redevelopment works taking place, based on the average length of stay (LOS) in care homes.</p>	Ongoing	Locality teams and Brokerage

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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?

- “Planning for your future” events across Surrey – sharing information with families/carers about what support is available, planning finances and how to be prepared.

Any negative impacts that cannot be mitigated?

N/a

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Socio Economic Disadvantage

Describe here the considerations and concerns in relation to the programme/policy for the selected group.

Surrey's affluent status results in a high percentage of self-funded placements in the market which presents challenges. While there may be sufficient bed capacity for care home placements, affordability remains a significant barrier for long-term care placements, creating inequalities in access to quality care services across Surrey.

In addition, the UK is facing its biggest cost of living crisis in decades. Surrey County Council and its partners across the county have seen more people coming for help with crisis support, energy problems and not having enough money to make ends meet than ever before. According to SCC's "Looking at the Cost of Living Crisis", these are the ways the crisis is impacting on residents and the local economy:

- 14,006 Surrey residents aged 65 and over were on Pension Credit which can represent levels of poverty in older residents (2024)
- 8.3% of Surrey households are estimated to be in fuel poverty (2022)
- Census 2021 Tenure figures indicate that 11.4% of households in Surrey, amounting to 55,055, are classified as Social rented. This is lower than both the national (17.1%) and regional (13.6%) averages.
- The lowest paid 10% of Surrey residents in full-time employment have a median hourly wage of £12.10 (the real living wage is £12.00) (2023)
- 14.6% more Surrey residents on Universal Credit while in work (representing 8,927 residents) in July 2024 compared to the previous year
- National private rental prices increased by 6.0% in January compared to last year

Describe here suggested mitigations to inform the actions needed to reduce inequalities.

Impacts Identified	How will you maximise positive / minimise negative impacts?	When will this be implemented by?	Owner
Positive impact (option 1):	n/a		

<p>Self-funding residents will continue paying existing rates.</p>			
<p>Positive impact (option 2 & 3):</p> <p>Delivery of the strategy will enable SCC to have more affordable capacity to ensure there is equitable access to quality care homes in Surrey, regardless of a person's socio-economic status.</p> <p>By providing ASC-funded beds on SCC owned sites, SCC is ensuring they have a market presence to enable affordable capacity, so there is not 100% reliance on the self-funder market.</p>	<p>Continuation of demand and commercial modelling to inform the provision of ASC-funded beds and number of nursing beds required to meet the need in Surrey.</p> <p>Co-design and engagement to understand what people value about care to inform care home design and service specification development.</p> <p>Work with the existing care home market to increase capacity in order to meet the need.</p>	<p>Ongoing</p> <p>Jan-April 2025</p> <p>Ongoing</p>	<p>Older People Commissioning</p>
<p>Negative impact (option 2, 3, 4):</p> <p>Potential for an increase in operating costs and an increase charge to self-funders living in the home if temporarily relocated to a home that is more expensive.</p>	<p>Work with providers approved SCC Residential and Nursing Care Contract to maintain residents existing price for self-funders so that there is not an increase. Choice Guidance to be considered.</p>	<p>Ongoing</p>	<p>Locality teams and Brokerage</p>

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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?

- Introduction of another tenure and care type for older people – Extra Care Housing, which would offer an alternative accommodation and care offer that could suit an individual's needs better.
- The centralised brokerage team draws on the shared knowledge of Surrey as a whole to be able to better meet resident's individual needs, including relating to the equalities protected characteristics.
- "Planning for your future" events across Surrey – sharing information about what support is available, planning finances and how to be prepared.
- Working with Residential & Nursing Care Home providers to promote information for self-funders about the implications of reaching capital threshold so that individuals are better prepared.

Any negative impacts that cannot be mitigated?

N/a

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 three. It is recommended that the delivery of the Residential & Nursing Care Delivery Strategy, is continued.

Explanation:

This EIA demonstrates that there are significant long-term benefits of delivering the Residential & Nursing Care Delivery strategy for Surrey's population. In particular, older people and people with disabilities, stand to gain from increased affordable provision that is designed to meet complex physical frailties and complex mental health needs. According to demand modelling, Surrey requires 230 more enhanced residential and nursing beds by 2030 to meet the population's needs. Furthermore, the design of "homes of the future", gives older people and people with disabilities accommodation that is fit-for-purpose. Their home will adapt as their needs change, allowing them consistent care and smooth transitions.

Delivery of the strategy gives SCC more affordable capacity to ensure there is equitable access to quality care homes across Surrey, regardless of a person's socio-economic status.

Some short-term negative impacts have been considered, but there is a comprehensive minimisation action plan in place.

5. Action plan and monitoring arrangements

Insert your action plan here, based on the mitigations recommended.

Item	Initiation Date	Action/Item	Person Actioning	Target Completion Date	Update/Notes	Open/ Closed
1	January 2025	Co-design and engagement to understand what people value about care to inform care home design and service specification development.	Older People Commissioning	April 2025		
2	May 2025	Formal public consultation to have informed discussions with residents and their families/carers on the different options	Older People Commissioning	August 2025		
3	Ongoing	Work with the existing care home market to increase capacity in order to meet the need.	Older People Commissioning	Ongoing		
4	Ongoing	Business continuity plans in place. Review annually.	Land & Property	Ongoing		

Equality Impact Assessment

5	Ongoing	Continue to treat residents with respect and dignity.	Locality Teams	Ongoing		
6	Ongoing	Regular review of practice to ensure guidelines are being followed to minimise the risk of infections spreading.	Locality Teams	Ongoing		
7	In line with implementation plan	Implement phased plans across the care homes / care home refurbishment to move clients to alternative units / homes whilst work is being done.	Older People Commissioning	In line with implementation plan		
8	Ongoing	Development of the Generic Design Brief with input from practitioners, industry experts and residents.	Older People Commissioning	Ongoing		

9	Ongoing	Training is provided to staff to encourage good practice when moving or handling residents. If care and support needs cannot safely be met, residents should be assessed and transferred to a care setting that can meet their assessed needs.	Locality Teams	Ongoing		
10	Ongoing	Support providers to deliver awareness training to staff on how to support residents with sensory impairments.	Older People Commissioning	Ongoing		
11	In line with implementation plan	Transition planning and any resident moves will include a plain English communications plan, translation services and involve current care home staff and families/carers.	Older People Commissioning	In line with implementation plan		

Equality Impact Assessment

12	In line with implementation plan	Adult Social Care team locality staff would plan to review new placements after 6 weeks.	Locality Teams	In line with implementation plan		
13	In line with implementation plan	Support providers to deliver EDI-focused cultural competency training for care workers. This can ensure they are sensitive to diverse backgrounds, including race, religion, and sexual orientation, when providing care. This will also cover the specific needs and challenges older LGBTQ+ people may face. This training should cover how to provide care without making assumptions and how to treat everyone with respect.	Older People Commissioning	In line with implementation plan		

14	In line with implementation plan	Ensure staff know how to handle sensitive information about a resident's gender identity and sexuality respectfully and keep it confidential.	Older People Commissioning	In line with implementation plan		
15	In line with implementation plan	Display LGBTQ+ symbols, like rainbow flags, to show the care setting is a safe and welcoming space for everyone. Encourage residents to feel comfortable being themselves.	Older People Commissioning	In line with implementation plan		
16	Ongoing	When creating care plans, ask about the resident's preferences related to gender, pronouns, and care. Understand any family situations or past experiences with discrimination.	Locality Teams	Ongoing		

Equality Impact Assessment

17	In line with implementation plan	Partner with local LGBTQ+ organisations for guidance and support to make sure we're using the best practices for inclusive care.	Older People Commissioning	In line with implementation plan		
18	In line with implementation plan	Engagement with local care market to understand local community services that can meet residents' needs.	Older People Commissioning	In line with implementation plan		
19	In line with implementation plan	Engagement with local care market to understand local capacity that can meet residents' needs.	Older People Commissioning	n line with implementation plan		
20	Ongoing	Brokerage team to use knowledge to match language needs to care home where there are staff members who speak the resident's first language.	Brokerage	Ongoing		

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21	Ongoing	Support providers to respect residents' religious practices, including providing a prayer space and ensuring religious dietary requirements are met.	Older People Commissioning	Ongoing		
22	In line with implementation plan	Work with providers approved SCC Residential and Nursing Care Contract to maintain residents existing price for self-funders so that there is not an increase. Choice Guidance to be considered.	Older People Commissioning			
23	September 2025	Implement robust person-centred assessments of all residents in the 6 care homes to ensure their individual needs are fully understood.	Locality teams	In line with implementation plan		

Equality Impact Assessment

24	Ongoing	Continuation of demand and commercial modelling to inform the provision of ASC-funded beds and number of nursing beds required to meet the need in Surrey.	Performance & Data Analysis	Ongoing		
25	December 2024	Carry out condition surveys and building reviews to assess building infrastructure, risk of infrastructure failure, and ensuring building standards and regulatory requirements are being met. Carry out feasibility surveys for refurbish/redevelop plans.	Land & Property	April 2025		
26	January 2025	Development of a new care specification to improve outcomes for older people with experts in the provider market, operational colleagues and commissioning.	Older People Commissioning	September 2025		

27	September 2025	Consider reducing placements to care homes 18 months prior to any redevelopment works taking place, based on the average length of stay (LOS) in care homes.	Older People Commissioning	January 2027		
28	March 2027	Follow up engagement with residents, particularly those in equality protected characteristics groups, to monitor how the changes have impacted on them and how their needs relating to equality, diversity and inclusion, are being met.	Older People Commissioning / Locality	August 2027		

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6a. Version control

Equality Impact Assessment

Version Number	Purpose/Change	Author	Date
1	Draft EIA	Sarah Rajendram	4 October 2024
2	To reflect comments from AWHP EDI Manager and Chief of Staff	Sarah Rajendram	17 October 2024

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.

Equality Impact Assessment

6b. Approval

Secure approval from the appropriate level of management based on nature of issue and scale of change being assessed.

The level of EIA sign off will depend on who the change affects. Generally speaking, for strictly internal changes, Head of Service/ Exec Director sign off should suffice. For changes affecting residents, the Cabinet Member is required to approve completed EIAs.

14

Approved by	Date approved
Director	Jon Lillistone, Director of Integrated Commissioning, Adults, Wellbeing and Health Partnerships 31 October 2024
Directorate Equality Group/ EDI Group (If Applicable) (arrangements will differ depending on your Directorate. Please enquire with your Head of Service or the CSP Team if unsure)	Kathryn Pyper, Chief of Staff, Adults, Wellbeing and Health Partnerships 16 October 2024

Publish:

It is recommended that all EIAs are published on Surrey County Council's website.

Please send approved EIAs to: equalityimpactassessments@surreycc.gov.uk

EIA author:

6c. EIA Team

Name	Job Title	Organisation	Team Role
Sarah Rajendram	Commissioning Manager, Adults, Wellbeing and Health Partnerships	Surrey County Council	Commissioning
Katie Newton	Senior Commissioning Manager, Adults, Wellbeing and Health Partnerships	Surrey County Council	Commissioning Lead

If you would like this information in large print, Braille, on CD or in another language please contact us on:

Tel: 03456 009 009

Textphone (via Text Relay): 18001 03456 009 009

SMS: 07860 053 465

Equality Impact Assessment

Email: contactcentre@surreycc.gov.uk

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SURREY COUNTY COUNCIL**CABINET**

DATE:	26 NOVEMBER 2024
REPORT OF CABINET MEMBER:	NATALIE BRAMHALL, CABINET MEMBER FOR PROPERTY, WASTE AND INFRASTRUCTURE
LEAD OFFICER:	SIMON CROWTHER, EXECUTIVE DIRECTOR PROPERTY, ECONOMY AND GROWTH
SUBJECT:	DISPOSAL OF THE FORMER ABBEYWOOD CARE HOME, ASH
ORGANISATION STRATEGY PRIORITY AREA:	GROWING A SUSTAINABLE ECONOMY SO EVERYONE CAN BENEFIT/ TACKLING HEALTH INEQUALITY/ ENABLING A GREENER FUTURE/ EMPOWERING COMMUNITIES

15

Purpose of the Report:

This report seeks approval of Cabinet to the freehold disposal of the former care home at Abbeywood, Ash, following an open market campaign. The asset is offered with full vacant possession and the transaction conditional on several factors outlined in this report.

A separate Part 2 report contains information which is exempt from Access to Information Requirements by virtue of Schedule 12A Local Government Act 1972, paragraph 3, "Information relating to the financial or business affairs of any particular person (including the authority holding that information")

Recommendations:

It is recommended that Cabinet:

1. Formally declares the asset surplus to operational requirements.
2. Approves the sale of the former Abbeywood Care home at Ash to the party noted in the part 2 report and on the terms recommended.
3. Delegates authority to the Executive Director Environment Property and Growth, in consultation with the Director of Land & Property, to finalise the transaction and conclude all associated legal agreements.

Reason for Recommendations:

Cabinet has previously endorsed rationalisation of the surplus estate, and the reported bid follows an open marketing campaign of the former Abbeywood care home at Ash, where bids were received after eleven viewings and enquiries. The bids are as reported in the part 2 report.

Full status and funding enquiries have been made of the recommended bidder and further information on the company is in the part 2 report.

To enable the disposal, Cabinet is to formally declare an asset surplus to operational requirements under the Surrey County Council's (The Council) Constitution.

Executive Summary:

1. The property comprises of a purpose-built care home that was constructed in the 1980s and provided accommodation for up to fifty-one occupiers over ground and first floors. The asset was formally closed by the Council in 2022 as deemed not fit for purpose and has been vacant since.
2. The asset sits on a site extending to 0.4 hectare (1.04 acres).
3. At close of marketing, a range of bids were received from a mix of private sector residential and care home developers (see part 2 report).
4. All bids were reviewed for deliverability risk between our agents and planning consultants against which recommendations were made. The full capital receipt has been forecast in Medium Term Financial (MTFS).
5. Although the Council continues to bring forward projects for care, extra care and supported living schemes across its Adult and Children Services, the Abbeywood site has been rejected as it does not support their current modelling and locality needs. On that basis it is recommended as a surplus declaration.
6. Options considered as part of the pre-marketing included:
 - i) Demolition of the asset to mitigate site security risk, and void holding costs. Estimate demolition and full site clearance £225,000. Year 1 void costs include site hoarding and security of £50,000.
 - ii) A disposal unconditional on planning: This normally gives a lower land value as the purchasers take on the full site and planning risk, including potential ground condition issues.
 - iii) A disposal conditional upon planning: On the basis that a sale would be subject to the successful outcome of planning submitted by the successful bidder. This would pass controls on planning over the site to a third party and defers any capital receipt until all conditions are satisfied, whilst the Council still holds the land risk in the interim.
 - iv) The Council submitting and securing an outline scheme to de risk a future sale. This premarketing activity would have required direct investment in town planning, ground and site survey activities, but may not ultimately have been used by a bidder (i.e. a consented scheme for houses would be jettisoned by a care home developer bidder).
 - v) Retained service use: After extensive reviews across all services, the asset was not required, hence this report seeks a formal surplus declaration.
 - vi) Halsey Garton Residential (HGR) declined the opportunity on the grounds that it does not take on speculative development risk and its current portfolio is currently existing income producing assets. Whilst the Council is keen to support housing of all types, it is not a direct housing developer.

7. The site is a previously developed site within the urban settlement boundary. As such, it is in an area where the principle of development is supported as it makes the most efficient use of land in the most sustainable areas of the district. Furthermore, the site exists within a defined urban settlement, Ash, which remains a focus for new housing as outlined by the emerging Local Plan. The part 2 report includes the Agents report and recommendations and the schedule of bids.
8. Legal Services has been appointed to provide conveyancing services and to ensure all disposals accord with statutory obligations.

Risk Management and Implications:

	Risk Description	Mitigation
1	Planning permission	The purchaser would be fully responsible for funding and securing their own consents as may be required
2	Bidders withdraw	Ability to remarket site
3	Cost increases: Inflation and Market Costs	All funding and construction risks are passed to the purchaser
4	Delay to Project or Non delivery	See part 2 report.
5	Net Zero Carbon targets	Any new development will have to accord with Waverley Borough Council planning policy and design standards, which include NZC targets.
6	Site/ground conditions	The Purchaser will undertake early due diligence and their own surveys to confirm their bid
7	Site security	See part 2 report

Financial and Value for Money Implications:

9. The transaction arises from an open marketing campaign which secured valued bids as outlined in the part 2 report.
10. The recommended bid was confirmed as supporting best value by the marketing agents and their summary report, is attached as an Appendix 1, part 2 report.
11. After extensive reviews across all services, the asset is not required for other capital schemes. The receipt will contribute to the MTFS capital receipt targets and the sale will ensure there are no ongoing revenue and void costs to maintain the site, (which are currently estimated at £25,000 per annum). This saving is assumed in the MTFS.
12. Legal Services has been instructed to conclude conveyancing matters and to ensure the Council complies with its legal and statutory obligations.

Section 151 Officer Commentary:

13. The Council continues to operate in a very challenging financial environment. Local authorities across the country are experiencing significant budgetary pressures. Surrey County Council has made significant progress in recent years to improve the Council's financial resilience and whilst this has built a stronger financial base from which to deliver our services, the cost-of-service delivery, increasing demand, financial uncertainty and government policy changes mean we continue to face challenges to our financial position. This requires an increased focus on financial management to

protect service delivery, a continuation of the need to deliver financial efficiencies and reduce spending in order to achieve a balanced budget position each year.

14. In addition to these immediate challenges, the medium-term financial outlook beyond 2024/5 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 most of the past decade. This places an onus on the Council to continue to consider issues of financial sustainability as a priority, to ensure the stable provision of services in the medium term.
15. The proposal in this report supports the wider strategy for asset rationalisations and the capital receipt supports the funding of the capital programme, as assumed in the MTFS. Furthermore, there is a small revenue saving for this building as assumed in the MTFS. As such, the Section 151 Officer supports the recommendation.

Legal Implications – Monitoring Officer:

16. This paper seeks Cabinet approval for the disposal of the former Abbeywood Care Home, Ash, as outlined in the part 2 report.
17. Under Section 123 of the Local Government Act 1972 (LGA 1972), local authorities have the power to dispose of land in any manner they wish, subject to the disposal being for the best consideration reasonably obtainable. In pursuing any options to dispose, the Council should ensure that the price for any such disposal is 'market value' to comply with Section 123 LGA 1972.
18. It is noted that Cabinet have also been asked to formally declare this asset as surplus to operational requirements at recommendation 1. For any such declaration, all relevant guidance and the Council's internal processes must be followed.
19. Cabinet is under fiduciary duties to residents in respect of utilising public monies and Cabinet Members will want to satisfy themselves that the recommendations set out in this report should represent an appropriate use of the Council's resources.
20. All relevant steps and necessary checks as to the source of funds should be carried out during the transaction in accordance with the Council's Anti-Money Laundering procedures.
21. It is noted that the title to the property contains restrictive covenants which could impact the future use of the site. Due diligence should be undertaken to facilitate the disposal.
22. Legal advice should be sought at all relevant stages to ensure the Council meets its obligations.

Equalities and Diversity:

23. A full Equality Impact Assessment is not needed as this proposed disposal does not impact adversely on any specific parties, but a sale is seen as a benefit for the wider community given it will enable the asset holding to be regenerated.

24. 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	None arising from this report.
Safeguarding responsibilities for vulnerable children and adults	None arising from this report.
Environmental sustainability	None arising from this report.
Compliance against net-zero emissions target and future climate compatibility/resilience	A property disposal has no specific implications. Future refurbishment or development if pursued falls within Waverley Borough Council planning and Net Zero Carbon policy frameworks otherwise supported by the Council
Public Health	None arising from this report.

15

What Happens Next:

25. Lawyers are instructed and seeking to exchange early contracts and completion of the land transfer, subject only to Cabinet approval.

26. The purchaser will be fully responsible for the delivery and management of any scheme, together with managing all local stakeholder enquiries.

Report Author: Graham Glenn Head of Acquisitions and Disposals Tel: 07890 561245

Consulted:

- Natalie Bramhall, County Cabinet Member, Property, Waste & Infrastructure
- Simon Crowther, Executive Director, Environment, Property and Growth
- Diane Wilding, Director of Land and Property
- Colin Galletly, Assistant Director, Estates
- Local Member
- Asset Strategy Board
- Property Panel and Capital Programme Panel
- Property Legal Teams (Kara Burnett)
- Finance Team (Louise Lawson, Rachel Wigley)

Appendices:

See part 2 report.

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SURREY COUNTY COUNCIL**CABINET**

DATE:	26 NOVEMBER 2024
REPORT OF CABINET MEMBER:	NATALIE BRAMHALL, CABINET MEMBER FOR PROPERTY, WASTE AND INFRASTRUCTURE
LEAD OFFICER:	SIMON CROWTHER, EXECUTIVE DIRECTOR ENVIRONMENT, PROPERTY AND GROWTH
SUBJECT:	DISPOSAL OF THE FORMER CARE HOME, ARUNDEL HOUSE, GARRETT'S LANE, BANSTEAD
ORGANISATION STRATEGY PRIORITY AREA:	GROWING A SUSTAINABLE ECONOMY SO EVERYONE CAN BENEFIT/ TACKLING HEALTH INEQUALITY/ ENABLING A GREENER FUTURE/ EMPOWERING COMMUNITIES

16

Purpose of the Report:

This report seeks approval of Cabinet to the freehold disposal of the former care home at Arundel House, Garretts Lane, Banstead, following an extensive open marketing campaign. The asset is offered with full vacant possession and the transaction is outlined in this report.

A separate part 2 report contains information which is exempt from Access to Information Requirements by virtue of Schedule 12A Local Government Act 1972, paragraph 3, "Information relating to the financial or business affairs of any particular person (including the authority holding that information)".

Recommendations:

It is recommended that Cabinet:

1. Formally declares the asset surplus to operational requirements.
2. Approves the sale of Arundel House, Garretts Lane, Banstead, to the party and on the terms provided in the part 2 report.
3. Delegates authority to the Executive Director, Environment, Property and Growth, in consultation with the Director of Land & Property to finalise the transaction and conclude all associated legal agreements.

Reason for Recommendations:

Cabinet has previously endorsed rationalisation of the surplus estate, and the recommended bid follows an open marketing campaign of the former care home facility at Arundel House, Garretts Lane, Banstead, where a total of twenty-nine unconditional and conditional bids were received.

To enable the disposal, Cabinet is to formally declare an asset surplus to operational requirements under the Surrey County Council's (The Council) Constitution.

Executive Summary:

1. The property is a former children's care home comprising of an original 1930s main house with a range of modern extensions to the rear, together with a rear garden. The asset was formally closed by the Council in 2023 as deemed not fit for purpose and has been vacant since.
2. The asset sits on a site extending to 0.4 hectare (0.99 acres).
3. At close of marketing, twenty-three bidders submitted (twenty-nine proposals) with parties comprising of a mix of private sector residential and care home developers with bids as outlined in the part 2 report.
4. Bids were received on both a conditional and unconditional basis and all bids reviewed for deliverability risk between our agents and planning consultants.
5. Although the Council continues to bring forward projects for children's homes, care leavers, extra care and supported living schemes across its Adult and Children Services, the Banstead site has been rejected as it does not support current modelling and locality needs. On that basis it is recommended as a surplus declaration.
6. Options considered as part of the pre-marketing included:
 - i) A disposal unconditional on planning: This normally gives a lower land value as the purchasers take on the full site and planning risk, including potential ground condition issues.
 - ii) A disposal conditional upon planning: On the basis that a sale would be subject to the successful outcome of planning submitted by the successful bidder. This would pass controls on planning over the site to a third party and defers any capital receipt until all conditions are satisfied, whilst the Council still holds the land risk in the interim.
 - iii) The Council submitting and securing an outline scheme to de risk a future sale. This premarketing activity would have required direct investment in town planning, ground, and site survey activities, but may not have been used by a bidder (i.e. a consented scheme for houses would be jettisoned by a care home developer bidder).
 - iv) Retained service use: After extensive reviews across all services, the asset was not required, hence this report seeks a formal surplus declaration.
 - v) Halsey Garton Residential (HGR) declined the opportunity on the grounds that it does not take on speculative development risk and its current portfolio is currently existing income producing assets. Whilst the Council is keen to support housing of all types, it is not a direct housing developer.
7. The site is a previously developed site within the urban settlement boundary. As such, it is located in an area where the principle of development is supported as it makes the most efficient use of land in the most sustainable areas of the district. Furthermore, the site exists within a defined urban settlement.

8. A full schedule of bids received is attached within the Agents report and recommendations in the Appendix 1 (see part 2 report).
9. Legal Services has been appointed to provide conveyancing services and to ensure all disposals accord with legal and statutory obligations.

Risk Management and Implications:
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	Risk Description	Mitigation
1	Planning permission	See part 2 report
2	Bidders withdraw	Ability to remarket site
3	Cost increases: Inflation and Market Costs	All funding and construction risks are passed to the purchaser
4	Net Zero Carbon targets	The purchaser will deliver any new scheme subject to the planning policy and design standards of the local planning authority (Reigate and Banstead) which include NZC targets
5	Site/ground conditions	See part 2 report

Financial and Value for Money Implications:
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10. The transaction arises from an open marketing campaign which secured twenty-three bidders as outlined in the part 2 report.
11. The recommended bid was confirmed as supporting best value and recommended by the marketing agents and their summary report attached as Appendix 1 (see part 2 report).
12. After extensive reviews across all services, the asset is not required for other capital schemes. The receipt will contribute to the Medium-Term Financial Strategy (MTFS) capital receipt targets and the sale will ensure there are no ongoing revenue and void costs to maintain the site (which are currently running at circa £25,000 per annum). This saving is assumed in the MTFS.
13. Whilst there is a risk that the party could withdraw from the transaction, there are other bidders who would be re-approached.
14. Legal Services has been instructed to conclude conveyancing matters and to ensure the Council complies with its legal and statutory obligations.

Section 151 Officer Commentary:
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15. The Council continues to operate in a very challenging financial environment. Local authorities across the country are experiencing significant budgetary pressures. Surrey County Council has made significant progress in recent years to improve the Council's financial resilience and whilst this has built a stronger financial base from which to deliver our services, the cost-of-service delivery, increasing demand, financial uncertainty and government policy changes mean we continue to face challenges to our financial position. This requires an increased focus on financial management to protect service delivery, a continuation of the need to deliver financial efficiencies and reduce spending in order to achieve a balanced budget position each year.

16. In addition to these immediate challenges, the medium-term financial outlook beyond 2024/25 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 much of the past decade. This places an onus on the Council to continue to consider issues of financial sustainability as a priority, to ensure the stable provision of services in the medium term.
17. The proposal in this report supports the wider strategy for asset rationalisations and the capital receipt supports the funding of the capital programme, as assumed in the MTFS. Furthermore, there is a small revenue saving for this building as assumed in the MTFS. As such, the Section 151 Officer supports the recommendation.

Legal Implications – Monitoring Officer:

18. This paper seeks Cabinet approval for the disposal of a former residential care home at Arundel House Banstead as outlined in the part 2 report.
19. Under Section 123 of the Local Government Act 1972 (LGA 1972), local authorities have the power to dispose of land in any manner they wish, subject to the disposal being for the best consideration reasonably obtainable. In pursuing any options to dispose, the Council should ensure that the price for any such disposal is 'market value' to comply with Section 123 LGA 1972.
20. Cabinet have been asked to formally declare this asset as surplus to operational requirements at recommendation 1. For any such declaration, all relevant guidance and the Council's internal processes must be followed.
21. Cabinet is under fiduciary duties to residents in respect of utilising public monies and Cabinet Members will want to satisfy themselves that the recommendations set out in this report represent an appropriate use of the Council's resources.
22. All relevant steps and necessary checks as to the source of funds should be carried out during the transaction in accordance with the Council's Anti-Money Laundering procedures.
23. It is noted that the title to the property contains restrictive covenants which would impact the future use of the site. Due diligence should be undertaken to facilitate the disposal.
24. Legal advice should be sought at all relevant stages to ensure the Council meets its obligations.

Equalities and Diversity:

25. A full Equality Impact Assessment is not needed as this proposed disposal does not impact adversely on any specific parties, but a sale is seen as a benefit for the wider community given it will enable the asset holding to be regenerated.
26. 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	None arising from this report.

Area assessed:	Direct Implications:
Safeguarding responsibilities for vulnerable children and adults	None arising from this report.
Environmental sustainability	None arising from this report.
Compliance against net-zero emissions target and future climate compatibility/resilience	A property disposal has no specific implications. Future refurbishment or development if pursued falls within Reigate and Banstead Borough Council planning and Net Zero Carbon policy frameworks otherwise supported by the Council.
Public Health	None arising from this report.

Other Implications:

27. 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	N/A
Safeguarding responsibilities for vulnerable children and adults	N/A
Environmental sustainability	N/A
Compliance against net-zero emissions target and future climate compatibility/resilience	Any future development will be subject to Town Planning Regulations and full compliance by the purchaser going forward.
Public Health	There are no specific implications from a disposal.

What Happens Next:

28. Lawyers are instructed and seeking to exchange early contracts and completion of the land transfer, subject only to Cabinet approval.

29. The purchaser will be fully responsible for securing their costs and both delivering and managing any future scheme, together with managing all local stakeholder enquiries.

Report Author: Graham Glenn, Head of Acquisitions and Disposals, Tel: 07890 561245

Consulted:

- Natalie Bramhall, County Cabinet Member, Property, Waste & Infrastructure
- Simon Crowther, Executive Director, Environment, Property and Growth
- Diane Wilding, Director of Land and Property
- Colin Galletly, Assistant Director, Estates
- Local Member
- Asset Strategy Board
- Property Panel and Capital Programme Panel
- Property Legal Teams (Kara Burnett)

- Finance Team (Louise Lawson, Rachel Wigley)

Appendices:

See part 2 report.

SURREY COUNTY COUNCIL**CABINET**

DATE:	26 NOVEMBER 2024
REPORT OF CABINET MEMBER:	NATALIE BRAMHALL, CABINET MEMBER FOR PROPERTY, WASTE AND INFRASTRUCTURE
LEAD OFFICER:	SIMON CROWTHER, EXECUTIVE DIRECTOR ENVIRONMENT PROPERTY AND GROWTH
SUBJECT:	DISPOSAL OF THE FORMER BARNFIELD CARE HOME AT UPFIELDS, HORLEY, SURREY
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 seeks approval of Cabinet to the freehold disposal of the former care home Barnfield on Upfields, Horley, following an open marketing campaign. The asset is offered with full vacant possession.

A separate part 2 report contains information which is exempt from Access to Information Requirements by virtue of Schedule 12A Local Government Act 1972, paragraph 3, "Information relating to the financial or business affairs of any particular person (including the authority holding that information)".

Recommendations:

It is recommended that Cabinet:

1. Formally declares the asset surplus to operational requirements.
2. Approves the sale of Barnfield, Upfields, Horley, to the party and upon the terms outlined in the part 2 report.
3. Delegates authority to the Executive Director, Environment, Property and Growth, in consultation with the Director of Land & Property to finalise the transaction and conclude all associated legal agreements.

Reason for Recommendations:

Cabinet has previously endorsed rationalisation of the surplus estate, and the recommended bid follows an open marketing campaign of the former Barnfield care home at Horley where a total of 10 bids (1 unconditional and 9 conditional) were received.

To enable the disposal, Cabinet is requested to formally declare an asset surplus to operational requirements under the Surrey County Council's (The Council) Constitution.

Executive Summary:

1. The property comprises a 2-storey former care home, gardens and parking originally comprising of sixty-three bedrooms. The asset was formally closed by the Council in 2023 as deemed not fit for purpose and has been vacant since.
2. The asset sits on a site extending to 0.62 hectares (1.55 acres).
3. At close of marketing, bids were received from a mix of private sector residential and care home developers with bids as outlined in the part 2 report.
4. Although the Council continues to bring forward projects for children's homes, care leavers, extra care and supported living schemes across its Adult and Children Services, the Horley site has been rejected as it does not support current modelling and locality needs. On that basis it is recommended as a surplus declaration.
5. Options considered as part of the pre-marketing included:
 - i) A disposal unconditional on planning: This normally gives a lower land value as the purchasers take on the full site and planning risk, including potential ground condition issues.
 - ii) A disposal conditional upon planning: On the basis that a sale would be subject to the successful outcome of planning submitted by the successful bidder. This would pass controls on planning over the site to a third party and defers any capital receipt until all conditions are satisfied, whilst the Council still holds the land risk in the interim.
 - iii) The Council submitting and securing an outline scheme to de risk a future sale. This premarketing activity would have required direct investment in town planning, ground and site survey activities, but may not have been used by a bidder (i.e. a consented scheme for houses would be jettisoned by a care home developer bidder).
 - iv) Retained service use: After extensive reviews across all services, the asset was not required, hence this report seeks a formal surplus declaration.
 - v) Halsey Garton Residential (HGR) declined the opportunity on the grounds that it does not take on speculative development risk and its current portfolio is currently existing income producing assets. Whilst the Council is keen to support housing of all types, it is not a direct housing developer.
6. The site is a previously developed site within the urban settlement boundary. As such, it is located in an area where the principle of development is supported as it makes the most efficient use of land in the most sustainable areas of the district. Furthermore, the site exists within a defined urban settlement.
7. A full schedule of bids received, and the agents' formal recommendations are attached as part 2 report - Appendix 1.
8. Legal Services has been appointed to provide conveyancing services and to ensure all disposals accord with legal and statutory obligations.

Risk Management and Implications:

	Risk Description	Mitigation
1	Planning permission	The purchaser will be fully responsible for funding and securing their own consent on any redevelopment proposal or change of use
2	Bidders withdraw	Ability to remarket site
3	Cost increases: Inflation and Market Costs	All funding risks are passed to the purchaser
4	Net Zero Carbon targets	The Purchaser will be responsible for securing all required approvals, which include NZC targets, as part of their proposals to the planning authority Reigate and Banstead Borough Council.
5	Site/ground conditions	Refer to part 2 report

Financial and Value for Money Implications:

9. The transaction arises from an open marketing campaign which secured bids as reported in the part 2 report.
10. The disposal will be subject to costs of sale including legal and agency fees which will be approximately 2% of the sale value.
11. The recommended bid was confirmed as supporting best value by the marketing agents.
12. After extensive reviews across all services, the asset is not required for other capital schemes. The receipt will contribute to the Medium-Term Financial Strategy (MTFS) capital receipt targets and the sale will ensure there are no ongoing revenue and void costs to maintain the site, (which are currently £25,000 per annum). This saving is assumed in the current MTFS.
13. Whilst there is a risk that the purchaser could withdraw from the transaction, the site would be remarketed incurring nominal marketing costs (£2,000 to £3,000).
14. Legal Services has been instructed to conclude conveyancing matters and to ensure the Council complies with its legal and statutory obligations.

Section 151 Officer Commentary:

15. The Council continues to operate in a very challenging financial environment. Local authorities across the country are experiencing significant budgetary pressures. Surrey County Council has made significant progress in recent years to improve the Council's financial resilience and whilst this has built a stronger financial base from which to deliver our services, the cost-of-service delivery, increasing demand, financial uncertainty and government policy changes mean we continue to face challenges to our financial position. This requires an increased focus on financial management to protect service delivery, a continuation of the need to deliver financial efficiencies and reduce spending in order to achieve a balanced budget position each year.
16. In addition to these immediate challenges, the medium-term financial outlook beyond 2024/25 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 much 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 the stable provision of services in the medium term.

17. The proposal in this report supports the wider strategy for asset rationalisations and the capital receipt supports the funding of the capital programme, as assumed in the MTFS. Furthermore, there is a small revenue saving for this building as assumed in the MTFS. As such, the Section 151 Officer supports the recommendation.

Legal Implications – Monitoring Officer:

18. This paper seeks Cabinet approval for the disposal of a former Care home at Barnfield, Horley.
19. Under Section 123 of the Local Government Act 1972 (LGA 1972), local authorities have the power to dispose of land in any manner they wish, subject to the disposal being for the best consideration reasonably obtainable. In pursuing any options to dispose, the Council should ensure that the price for any such disposal is 'market value' to comply with Section 123 LGA 1972.
20. It is noted that Cabinet have also been asked to formally declare this asset as surplus to operational requirements at recommendation 1. For any such declaration, all relevant guidance and the Council's internal processes must be followed.
21. Cabinet is under fiduciary duties to residents in respect of utilising public monies and Cabinet Members will want to satisfy themselves that the recommendations set out in this report should represent an appropriate use of the Council's resources.
22. All relevant steps and necessary checks as to the source of funds should be carried out during the transaction in accordance with the Council's Anti-Money Laundering procedures.
23. It is noted that the title to the property contains restrictive covenants, and due diligence should be undertaken to facilitate the disposal.
24. Legal advice should be sought at all relevant stages to ensure the Council meets its obligations.

Equalities and Diversity:

25. A full Equality Impact Assessment is not needed as this proposed disposal does not impact adversely on any specific parties, but a sale is seen as a benefit for the wider community given it will be brought back into full and modern care use.
26. 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	None arising from this report.

Area assessed:	Direct Implications:
Safeguarding responsibilities for vulnerable children and adults	None arising from this report.
Environmental sustainability	None arising from this report.
Compliance against net-zero emissions target and future climate compatibility/resilience	A property disposal has no specific implications. Future refurbishment or development if pursued falls within Reigate and Banstead Borough Council planning and Net Zero Carbon policy frameworks otherwise supported by the Council.
Public Health	None arising from this report.

Other Implications:

27. 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	N/A
Safeguarding responsibilities for vulnerable children and adults	N/A
Environmental sustainability	N/A
Compliance against net-zero emissions target and future climate compatibility/resilience	Any future development will be subject to Town Planning Regulations and full compliance by the purchaser going forward.
Public Health	N/A

What Happens Next:

28. Lawyers are instructed and seeking to exchange early contracts and completion of the land transfer, subject only to Cabinet approval.
29. The purchaser will be fully responsible for securing their own planning consent and both delivering and managing the scheme, together with managing all local stakeholder enquiries.

Report Author: Graham Glenn, Head of Acquisitions and Disposals, Tel: 07890 561245

Consulted:

- Natalie Bramhall, County Cabinet Member, Property, Waste & Infrastructure
- Simon Crowther, Executive Director, Environment, Property and Growth
- Diane Wilding, Director of Land and Property
- Colin Galletly, Assistant Director, Estates
- Local Member
- Asset Strategy Board

- Property Panel and Capital Programme Panel
- Property Legal Teams (Kara Burnett)
- Finance Team (Louise Lawson, Rachel Wigley)

Appendices:

Part 2 report.

SURREY COUNTY COUNCIL

CABINET

DATE: 26 NOVEMBER 2024



REPORT OF CABINET MEMBER: DAVID LEWIS, CABINET MEMBER FOR FINANCE AND RESOURCES

LEAD OFFICER: ANDY BROWN, DEPUTY CHIEF EXECUTIVE & EXECUTIVE DIRECTOR OF FINANCE AND CORPORATE SERVICES (S151 OFFICER)

SUBJECT: 2024/25 MONTH 6 (SEPTEMBER) FINANCIAL REPORT

ORGANISATION STRATEGY PRIORITY AREA: NO ONE LEFT BEHIND / GROWING A SUSTAINABLE ECONOMY SO EVERYONE CAN BENEFIT / TACKLING HEALTH INEQUALITY / ENABLING A GREENER FUTURE / EMPOWERED AND THRIVING COMMUNITIES / HIGH PERFORMING COUNCIL

Purpose of the Report:

This report provides details of the Council's 2024/25 financial position, for revenue and capital budgets, as at 30th September 2024 (M6) and the expected outlook for the remainder of the financial year.

Regular reporting of the financial position underpins the delivery of all priority objectives, contributing to the overarching ambition to ensure No One Left Behind.

Key Messages – Revenue

- Local government continues to work in a challenging environment of sustained and significant pressures. **At M6, the Council is forecasting an overspend of £18.6m against the 2024/25 revenue budget.** The details are shown in Annex 1 and summarised in Table 1 (paragraph 1 below).
- All Directorates are working on developing mitigating actions to offset forecast overspends**, to deliver services within available budgets.
- In order to ensure ongoing financial resilience, the Council holds a corporate contingency budget and over recent years has re-established an appropriate level of reserves. These measures provide additional financial resilience should the residual forecast overspend not be effectively mitigated by corrective actions before the end of the financial year.

Key Messages – Capital

- The Capital Programme Panel, alongside Strategic Capital Groups, has undertaken an assurance review of the capital programme to ensure deliverability. This has resulted in a re-phased budget for 2024/25, approved by Cabinet in July 2024.
- At M6, capital expenditure of £325.5m is forecast for 2024/25. This is £9.0m more than the re-phased budget. Further details are provided in paragraphs 11-13.

Each quarter, key balance sheet indicators are reported; these are set out in Annex 2.

Recommendations:

It is recommended that Cabinet:

1. Notes the Council's forecast revenue budget and capital budget positions for the year.
2. Approves the write off of an Adult Social Care debt which is over £100,000, in accordance with Financial Regulation 21.4. Further details are available in the Part 2 report. The write off is necessary as part of a negotiated settlement following a complaint and dispute resolution, which leaves a residual amount to be written off.

Reason for Recommendations:

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

Executive Summary:

1. At M6, the Council is forecasting a full year overspend of £18.6m against the revenue budget. This is a £1.9m deterioration on the M5 position. Table 1 below shows the forecast revenue budget outturn for the year by Directorate (further details are set out in Annex 1):

Table 1 - Summary revenue budget forecast variances as at 30th September 2024

	M6 Forecast £m	Annual Budget £m	Forecast Variance £m
Adults, Wellbeing & Health Partnerships	515.3	511.7	3.6
Children, Families and Lifelong Learning	310.4	299.9	10.4
Environment, Infrastructure & Growth	192.1	185.5	6.5
Surrey Fire and Rescue Service	44.1	44.1	0.0
Customers, Digital & Change	50.7	50.8	(0.0)
Finance & Corporate Resources	27.6	27.5	0.0
Communications, Public Affairs and Engagement	2.8	2.8	(0.0)
Central Income & Expenditure	83.2	86.0	(2.8)
Directorate position	1,226.2	1,208.4	17.8
Contingency	0.0	0.0	0.0
Corporate Funding	(1,207.6)	(1,208.4)	0.8
Overall	18.6	0.0	18.6

2. The forecast overspend relates primarily to the following:

Adults Wellbeing & Health Partnerships - £3.6m overspend, £0.8m decrease from M5.

This is due to a £4.9m overspend on the total care package budget, primarily related to starting the year with higher care package commitments combined with spending pressures during year, particularly for Older People care packages, and a £2.2m overspend on the staffing & other expenditure budget due to the underachievement against the workforce reconfiguration efficiency

target, pressures related to statutory responsibilities for Deprivation of Liberty Safeguard assessments and improved recruitment and retention to deliver core statutory duties.

These pressures are partially mitigated by a £0.9m underspend for wider support services and £0.6m of additional grant funding.

The decrease since last month relates to a number of mitigations being put in place across the Directorate, offset by reduced care package income and increased care package expenditure.

Children, Families & Lifelong Learning - £10.4m overspend, £1.6m increase from M5

The movement in month 6 has been driven by some significant packages of support for individual Children in external placements as well as support for Children with disabilities in their homes.

Significantly, within this month there has also been recognition that £4.8m of prior year stretch savings targets are now considered unachievable in this financial year. This is partially offset by favourable movements in the amount of staff vacancies, increased grant income rates received for unaccompanied asylum-seeking Children and the application of some additional funding to reduce the Directorate overspend.

The largest area of pressure continues to be the overspend related to Home to School Travel Assistance of £7.4m, reflecting several factors, including growth in eligible SEN pupil numbers exceeding the initial assumptions. New modelling taking account of current trends has led to increases in demand profiles, which has in part been led by additional in year placements being made through the EHCP recovery work, however significant work to mitigate the demand pressures have meant the forecast overspend has remained steady in year.

Environment, Infrastructure & Growth - £6.5m overspend, £3.1m increase from M5.

Highways and Transport are forecasting a £3.0m overspend in relation to verge maintenance improvements. Additional pressures of £2m mainly relating to parking and traffic enforcement (contract inflation linked to the living wage, lower than expected levels of enforcement) have been mitigated by planned drawdown of one-off prior year parking surpluses.

Land & Property forecast a pressure of £2.4m, an increase of £0.6m on last month. Issues include increased facilities management and utilities costs (including backdated electricity charges), dual operation of office buildings, and delays to anticipated rental income. The service is reviewing the new contract to manage demand and reduce current rates of spend.

Environment forecasts an overspend of £1m, an improvement of £0.6m from month 5 following a reduction in closed landfill site liabilities. The remaining pressure is due primarily to market costs of managing dry mixed recyclables, after taking account of mitigations. There are smaller pressures and mitigations in other services.

Surrey Fire & Rescue Service – a balanced position is forecast, £0.1m decrease from M5.

A balanced position is forecast, with pressures offset by mitigations. A pressure of £0.2m due to abortive prior year capital costs is offset by a net staffing underspend and efficiencies generated through shared support costs of Joint Fire Control.

Central Income & Expenditure & Corporate Funding – £2m net underspend, a £2m increase from M5. (Central Income and Expenditure forecasting a £2.8m underspend, offset by a £0.8m overspend in corporate funding).

There is a £0.8m overspend/under-recovery forecast in relation to corporate funding relating to various business rates movements, including pressures relating to appeals, partially offset by additional income through the Business Rate Pool. This is offset by a forecast underspend of £0.8m in Central Income & Expenditure mainly due a £2m forecast underspend on transformation

expenditure, reduced forecasts for secondary pension contributions and other smaller underspends.

3. In addition to the forecast overspend position, emerging risks and opportunities are monitored throughout the year. Directorates have additionally identified net risks of £10.5m, consisting of quantified risks of £11.9m, offset by opportunities of £1.4m. This is a reduction in net risks of £6.3m from M5. These figures represent the weighted risks and opportunities, taking into account the full value of the potential risk or opportunity adjusted for assessed likelihood of the risk occurring or opportunity being realised.
4. Directorates are expected to take action to mitigate these risks and maximise the opportunities available to offset them, to avoid these resulting in a forecast overspend against the budget set.

Dedicated Schools Grant (DSG) update

5. The table below shows the projected forecast year-end outturn for the High Needs Block.

Table 2 - DSG HNB Summary

2024/25 DSG HNB Summary	Budget £m	Forecast £m	Variance £m
Education and Lifelong Learning	235.5	253.2	17.7
Place Funding	24.7	24.7	0.0
Children's Services	2.3	2.6	0.3
Corporate Funding	2.0	2.0	0.0
TOTAL	264.5	282.5	18.0
FUNDING	-225.5	-225.5	0.0
In-Year Deficit	39.0	57.0	18.0

6. The Council has remained within the spending profile for the first two years of the programme and first quarter forecasts had been showing that the trajectory was still on target.
7. Significant recovery work in completing outstanding Education Health and Care Plan (EHCP) backlogs and transition reviews in the early part of 2024/25 have highlighted that the ambitious budget reductions in the initial safety valve programme are under growing pressure for delivery this year. Additional state funded places have been delayed in becoming available whilst costs and demand have grown at a faster rate than in the original assumptions.
8. The current forecast is showing that pressure is emerging in all areas of the budget, with the costs and demand for places across all provisions showing increased numbers. Costs are increasing due to the shortage of availability for specialist placements as well as increased costs and need in mainstream provision.
9. The second monitoring report for the Safety Valve agreement in 2024/25 was submitted to the Department for Education at the end of August 2024. The instalment related to this return of £1.9m was received on the 30th of September. The next monitoring return is due at the end of November.
10. To date, the Council has received £80.08m in Safety Valve payments (80% of the total DfE contributions) with a remaining £19.92m due to be paid over the next three years. Our Safety Valve monitoring report had previously confirmed that the Council was on track with its agreed trajectory, The next iteration will draw out the pressures both from demand within the system and through cost inflation, and capital programme delays including the DfE funded Specialist Free Schools. There is also a new risk arising from potential VAT charges to non-maintained independent schools which may increase the number of parents seeking council funding through an EHCP.

Capital Budget

11. The 2024/25 Capital Budget was approved by Council on 6th February 2024 at £404.9m. The Capital Programme Panel, working alongside Strategic Capital Groups, has undertaken a detailed review of the programme to validate and ensure deliverability. The re-phased capital programme reduces the 2024/25 budget to £316.5m, as approved by Cabinet in July 2024.

12. The month six forecast is £325.5m, which is £9.0m more than the re-phased budget, and a £6.3m increase from month five.

Strategic Capital Groups	Annual Budget	FY Forecast at M6	M6 Forecast Variance	M5 Forecast Variance	Change from M5 to M6	Movement
	£m	£m	£m	£m	£m	
Property						
Property Schemes	131.2	132.1	0.9	0.9	0.0	Increase
ASC Schemes	1.6	1.6	0.0	0.0	0.0	Unchanged
CFLC Schemes	4.4	4.4	0.0	0.0	0.0	Unchanged
Property Total	137.2	138.1	0.9	0.9	0.0	Increase
Infrastructure						
Highways and Transport	125.2	137.6	12.4	6.0	6.4	Increase
Infrastructure and Major Projects	29.0	26.6	(2.4)	(2.4)	0.0	Unchanged
Environment	8.7	7.6	(1.1)	(0.9)	(0.2)	Decrease
Surrey Fire and Rescue	2.5	2.4	(0.1)	(0.1)	0.0	Unchanged
Infrastructure Total	165.4	174.2	8.8	2.6	6.2	Increase
IT						
IT Service Schemes	13.9	13.2	(0.7)	(0.8)	0.1	Increase
IT Total	13.9	13.2	(0.7)	(0.8)	0.1	Increase
Total	316.5	325.5	9.0	2.7	6.3	Increase

13. The overall variance is attributable to the following:

- **Land and Property - £0.9m variance over budget** caused by acceleration of works at Extra Care (Phase 2) sites.
- **Infrastructure - £8.8m variance over budget**, this includes £9.2m additional surface dressing and safety defect spend, including the A24 emergency works which it is assumed will be recovered through Damage to County Property processes, and other smaller changes to road safety and improvement schemes. There is also a £1.3m increase in Safety Barriers to be funded by Lane Rental bids, and £2.2m increased spend on footway maintenance.

These are partly offset by a delay to part of the Farnham Town Centre programme (£1.0m), slippage across various SIP schemes (£1.5m) and the early termination of a National Highways scheme (£0.5m) for improved air quality on the A3.

Home Upgrade Grant 2 is forecasting an underspend of £0.9m due to slow down in delivery due to the general election and installer capacity.

- **IT - £0.7m variance under budget**, caused by a further reprofile of the WAN / Wi-Fi refresh programme that has reprofiled spend into future years. This is due to a recent change in the scope and sites at which the work will take place this financial year.

Consultation:

14. Executive Directors and Cabinet Members have confirmed the forecast outturns for their revenue and capital budgets.

Risk Management and Implications:

15. 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:

16. The report considers financial and value for money implications throughout and future budget monitoring reports will continue this focus.

Section 151 Officer Commentary:

17. The Council continues to operate in a very challenging financial environment. Local authorities across the country are experiencing significant budgetary pressures. Surrey County Council has made significant progress in recent years to improve the Council's financial resilience and whilst this has built a stronger financial base from which to deliver our services, the cost of service delivery, increasing demand, financial uncertainty and government policy changes mean we continue to face challenges to our financial position. This requires an increased focus on financial management to protect service delivery, a continuation of the need to deliver financial efficiencies and reduce spending to achieve a balanced budget position each year.

18. In addition to these immediate challenges, the medium-term financial outlook beyond 2024/25 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 the stable provision of services in the medium term.

19. The Council has a duty to ensure its expenditure does not exceed the resources available. As such, 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:

20. 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.

21. 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:

22. 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.

23. 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 ongoing analysis.

What Happens Next:

24. The relevant adjustments from recommendations will be made to the Council's accounts.

Report Author: Andy Brown, Deputy Chief Executive and Executive Director of Finance and Corporate Services (s151 Officer) andy.brown@surreycc.gov.uk

Consulted: Cabinet, Executive Directors, Heads of Service

Annexes:

Annex 1 – Detailed Revenue M6 position

Annex 2 – Balance Sheet indicators

Detailed Revenue M6 Position

Annex 1

Service	Cabinet Member	Net budget	Forecast	Outturn variance
Public Health	M Nuti	£37.8m	£37.8m	£0.0m
Communities & Prevention	M Nuti	£3.4m	£3.3m	(£0.1m)
Adult Social Care	S Mooney	£470.4m	£474.1m	£3.7m
Adults, Wellbeing & Health Partnerships		£511.7m	£515.3m	£3.6m
Family Resilience	C Curran	£68.4m	£68.0m	(£0.4m)
Education and Lifelong Learning	C Curran	£31.6m	£31.2m	(£0.4m)
Commissioning	C Curran	£2.1m	£2.5m	£0.4m
Quality & Performance	C Curran	£87.4m	£94.4m	£7.0m
Corporate Parenting	C Curran	£112.0m	£112.9m	£0.9m
Exec Director of CFLL central costs	C Curran	-£1.7m	£1.3m	£3.0m
Children, Families and Lifelong Learning		£299.9m	£310.4m	£10.4m
Highways & Transport	M Furniss	£71.1m	£74.1m	£3.0m
Environment	M Heath/ N Bramhall	£82.8m	£83.8m	£1.0m
Infrastructure, Planning & Major Projects	M Furniss	£2.5m	£2.6m	£0.1m
Planning Performance & Support	M Furniss	£3.4m	£3.5m	£0.1m
Land & Property	N Bramhall	£24.0m	£26.4m	£2.4m
Economic Growth	M Furniss	£1.8m	£1.7m	(£0.1m)
Environment, Infrastructure & Growth		£185.5m	£192.1m	£6.5m
Surrey Fire and Rescue	K Deanus	£40.4m	£40.4m	£0.0m
Safer Communities	K Deanus	£1.2m	£1.2m	£0.0m
Emergency Management	K Deanus	£0.7m	£0.7m	£0.0m
Trading Standards	D Turner-Stewart	£1.8m	£1.8m	£0.0m
Surrey Fire and Rescue Service		£44.1m	£44.1m	£0.0m
Armed Forces and Resilience	K Deanus	£0.1m	£0.1m	£0.0m
Comms, Public Affairs & Engagement	T Oliver	£2.7m	£2.7m	(£0.0m)
Communications, Public Affairs and Engagement		£2.8m	£2.8m	(£0.0m)
Active Surrey	D Lewis	£0.0m	£0.0m	£0.0m
Coroners	K Deanus	£4.6m	£4.6m	(£0.0m)
Customer Services	D Turner-Stewart	£3.2m	£3.4m	£0.1m
Customer Experience	D Turner-Stewart	£0.5m	£0.5m	£0.0m
Customer and Communities	D Turner-Stewart			
Leadership		£0.5m	£0.5m	£0.0m
Design & Change	D Lewis	£4.1m	£3.6m	(£0.5m)
Heritage	D Turner-Stewart	£0.9m	£0.9m	£0.0m
Information Technology & Digital	D Lewis	£21.2m	£21.1m	(£0.0m)
Libraries Services	D Turner-Stewart	£7.8m	£7.8m	£0.0m
People & Change	T Oliver	£9.4m	£9.6m	£0.3m
Registration and Nationality Services	D Turner-Stewart	-£1.7m	-£1.7m	(£0.0m)
Surrey Arts	D Turner-Stewart	£0.4m	£0.4m	£0.0m
Transformation Programmes	D Lewis	£0.0m	£0.0m	£0.0m
Customers, Digital & Change		£50.8m	£50.6m	(£0.0m)
Finance	D Lewis	£9.2m	£9.2m	£0.0m
Joint Orbis	D Lewis	£6.0m	£6.3m	£0.3m
Legal Services	D Lewis	£6.2m	£6.2m	(£0.0m)
Democratic Services	D Lewis	£3.9m	£3.9m	£0.0m
Director of Resources	D Lewis	£0.1m	£0.2m	£0.1m
Leadership Office	D Lewis	£2.3m	£2.0m	(£0.2m)
Corporate Strategy and Policy	D Lewis	£1.2m	£1.0m	(£0.1m)
Pensions	D Lewis	-£0.7m	-£0.7m	(£0.0m)
Performance Management	D Lewis	£0.2m	£0.2m	£0.0m
Procurement	D Lewis	£0.1m	£0.1m	£0.0m
Twelve15	D Lewis	-£1.0m	-£1.1m	(£0.0m)
Finance & Corporate Services		£27.5m	£27.6m	£0.0m
Central Income & Expenditure	D Lewis	£86.0m	£83.2m	(£2.8m)
Directorate position		£1,208.4m	£1,226.1m	£17.8m
Corporate Funding		-£1,208.4m	-£1,207.6m	£0.8m
Overall		-£0.0m	£18.6m	£18.6m

Prudential Indicators (capital expenditure, borrowing and commercial & service investments)

1. All Prudential Indicators have been adhered to and the Authorised Borrowing Limit and Operational Boundary have not been breached during the period.
2. The Council measures and manages its capital expenditure, borrowing and commercial and service investments with reference to the following indicators, which are reported to Cabinet on a quarterly basis.

Table 1: Estimates of Capital Expenditure

	2023/24 Actual	2024/25 Forecast	2025/26 Budget	2026/27 Budget	2027/28 Budget	2028/29 Budget
	£m	£m	£m	£m	£m	£m
Capital Programme - Budget	298	326	344	231	164	147
Capital Programme - Pipeline	-	43	250	127	60	53
Sub-total Capital Programme	298	369	594	359	223	201
Capital investment strategy	1	23	3	-	-	-
TOTAL	299	392	597	359	223	201

Estimates of Capital Financing Requirement

3. The Council's cumulative outstanding amount of debt finance is measured by the Capital Financing Requirement (CFR). This increases with new debt-financed capital expenditure on service delivery and on investments and reduces by the annual Minimum Revenue Provision and capital receipts used to replace debt.

Table 2: Estimates of Capital Financing Requirement

	2023/24 Actual	2024/25 Forecast	2025/26 Budget	2026/27 Budget	2027/28 Budget	2028/29 Budget
	£m	£m	£m	£m	£m	£m
Capital Programme	1,064	1,247	1,709	1,858	1,936	2,012
Investment Programme	439	453	446	437	428	420
TOTAL CFR	1,503	1,700	2,155	2,295	2,364	2,432

Proportion of Financing Costs to Net Revenue Stream

4. This is an indicator of affordability and highlights the revenue implications of existing and proposed capital expenditure by identifying the proportion of the revenue budget required to meet financing costs. The net annual charge is known as financing costs; this is compared to the net revenue stream i.e. the amount funded from council tax, business rates and general government grants.
5. In February 2024, the Council approved an ambitious Capital Programme to 2028/29, continuing the significant investment in infrastructure and assets to support key services. As table 3 illustrates, the mid-term financing costs are forecast to increase over the medium term (3.6% in 2023/24 to 7.5% in 2028/29). This means that financing costs will reduce the percentage of the revenue budget available for other uses, unless the revenue budget increases more than forecast and / or capital expenditure funded by borrowing is less than forecast. As part of the 2025/26 – 2029/30 Medium Term Financial Strategy Planning a review of all capital commitments is underway.

Table 3: Proportion of Financing Costs to Net Revenue Stream

	2023/24 Actual	2024/25 Forecast	2025/26 Budget	2026/27 Budget	2027/28 Budget	2028/29 Budget
Ratio of Net Financing Costs to Net Revenue Stream	3.6%	3.3%	4.7%	5.9%	6.8%	7.5%

Net Income from Commercial and Service Investments to Net Revenue Stream

- This is an indicator of affordability and highlights the net financial impact on the authority of its entire non-treasury investment income.
- The Councils reliance on non-treasury investment income is forecast to remain at 1.6% over the mid-term. This is a small proportion of the total net revenue stream and demonstrates that the Council has limited exposure to external commercial market forces.

Table 4: Net Income from Commercial and Service Investments to Net Revenue Stream

	2023/24 Actual	2024/25 Budget	2025/26 Budget	2026/27 Budget	2027/28 Budget	2028/29 Budget
Total net income from service and commercial investments (£m)	21	19	19	19	19	19
Proportion of net revenue stream	1.9%	1.6%	1.6%	1.6%	1.6%	1.5%

Investments

- The Council's average daily level of investments has been £67.0m during 2024/25 (up to the end of Q2), compared to an average of £68.0m during 2023/24 (up to the end of Q2). The lower cash investment balances reflect management of the Council's cash flow and the higher borrowing costs incurred currently for short-term borrowing.
- The Bank of England (BoE) base rate was reduced by 0.25% in August 2024 to 5.00%. The Council invests temporary cash surplus exclusively through the use of money market funds (MMF). Other investment facilities are available, including: brokers, direct dealing with counterparties through the use of call accounts or direct deal facilities, or with the government's Debt Management Office (DMO). No new fixed term deposits have been agreed during 2024/25, MMF investments ensure sufficient liquidity and to reduce credit risk exposure.
- Table 5 shows the weighted average return on all investments the Council received in the quarter to 30 September 2024 is 5.10%. This compares to a 5.08% average Bank of England (BoE) base rate for the same period.
- Table 5: Weighted average return on investments compared to Bank of England (BoE) base rate.

Period	2024/25		2023/24		2022/23	
	Average BoE Base Rate	Weighted return on investments	Average BoE Base Rate	Weighted return on investments	Average BoE Base Rate	Weighted return on investments
Quarter 4 (Mar)	-	-	5.25%	5.27%	3.85%	3.67%
Quarter 3 (Dec)	-	-	5.25%	5.29%	2.82%	2.56%
Quarter 2 (Sep)	5.08%	5.10%	5.16%	5.02%	1.61%	1.48%
Quarter 1 (Jun)	5.25%	5.23%	4.44%	4.33%	0.95%	0.77%

Note: All numbers in all tables have been rounded - which may cause a casting difference

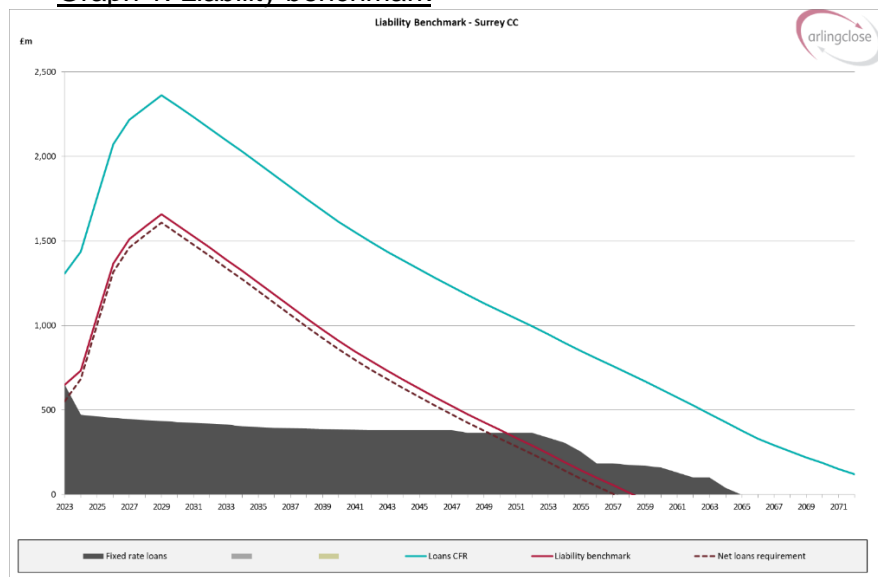
Liability Benchmark

- The liability benchmark compares the Council's actual borrowing against an alternative strategy and is updated as part of the annual Capital Investment and Treasury Management Strategy. This

is an important tool to help establish whether the Council is likely to be a long-term borrower or long-term investor in the future, and so shape its strategic focus and decision making. The benchmark itself represents an estimate of the cumulative amount of external borrowing the Council must hold to fund its current capital and revenue plans while keeping treasury investments at the minimum level required to manage day-to-day cash flow.

13. The liability benchmark as part of the 2024/25 Capital Investment and Treasury Management Strategy is as follows:

Graph 1: Liability benchmark



Debt

14. During the three months to 30 September 2024, the Council raised invoices totalling £75.1m. Overdue debt is the total debt less those balances not immediately due (i.e. less than 30 days old). There was a total of £52.6m of overdue debt at the end of September 2024, an increase of £0.4m since the last quarter. General debt has decreased by £5.3m since the last quarter, but this is offset by an increase in Integrated Care Board debt of £4.2m since the last quarter and a smaller increase in other local authority debt.

15. Unsecured social care overdue debt has remained stable since the last quarter. The Financial Assessments & Income Collection Team in ASC responsible for the recovery of social care debt take a range of actions to recover unsecured debts. In addition to undertaking probate searches, the team agree instalment arrangements, pursue recovery action, including via the Council's legal services team if necessary, and take action to secure the debt where possible.

Table 6: Age profile of the Council's debt as at 30 September 2024

Account group	<1	1-12	1 to 2	over 2	Gross	Overdue	Q1 Overdue	
	month	months	years	years	debt	debt	debt	Change
	£m	£m	£m	£m	£m	£m	£m	£m
Care debt – unsecured	6.7	11.5	5.9	6.5	30.7	24.0	24.0	0.0
Care debt – secured	0.6	5.3	3.7	4.4	14.0	0.0		
Total care debt	7.3	16.9	9.6	10.9	44.7	24.0	24.0	0.0
Schools, colleges and nurseries	1.3	0.4	0.1	0.0	1.8	1.0	1.0	0.0
Integrated Care Boards	9.7	15.5	2.1	0.9	28.2	18.5	14.2	4.2
Other local authorities	4.1	2.5	0.1	0.0	6.7	2.6	1.1	1.5
General debt	4.0	3.5	1.7	1.3	10.5	6.5	11.9	(5.3)
Total non-care debt	19.2	21.9	4.0	2.2	47.2	28.6	28.2	0.4
Total debt	26.5	38.7	13.6	13.1	91.9	52.6	52.2	0.4
Q1 2024/25	24.0	39.0	13.6	12.7	89.4	52.2		
Change	2.5	(0.3)	(0.0)	0.4	2.6	0.4		

* Secured care debt does not become due until either the property is sold or after 90 days following the death of the resident, whichever is earlier.

Note: All numbers have been rounded - which might cause a casting difference.

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