Notice of Meeting

Cabinet

SURREY
COUNTY COUNCIL

<u>Date and Time</u>	<u>Place</u>	<u>Contact</u>	<u>Web:</u>
Tuesday, 28 January 2025 2.00 pm	Surrey County Council, Council Chamber, Woodhatch Place, 11 Cockshot Hill, Reigate, Surrey, RH2 8EF	Huma Younis or Sarah Quinn huma.younis@surreycc.gov.uk or sarah.quinn@surreycc.gov.uk	[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 OBE, Denise Turner-Stewart
Maureen Attewell, Steve Bax, Paul Deach and 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.

This meeting will be held in public at the venue mentioned above and may be webcast live. Generally the public seating areas are not filmed. However, by entering the meeting room and using the public seating area or attending online, you are consenting to being filmed and to the possible use of those images and sound recordings for webcasting and/or training purposes. If webcast, a recording will be available on the Council's website post-meeting. The live webcast and recording can be accessed via the Council's website: https://surreycc.public-i.tv/core/portal/home

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 MEETINGS: 17 DECEMBER 2024 AND 8   (Pages
JANUARY 2025   1 - 18)**

To agree the minutes of the previous meetings held on 17 December
2024 and 8 January 2025 as correct records of those meetings.

3   DECLARATIONS OF INTEREST

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

(i)   Any disclosable pecuniary interests and / or

(ii) Other interests arising under the Code of Conduct in respect of
any item(s) of business being considered at this meeting

NOTES:

- Members are reminded that they must not participate in any
  item where they have a disclosable pecuniary interest

- As well as an interest of the Member, this includes any interest,
  of which the Member is aware, that relates to the Member's
  spouse or civil partner (or any person with whom the Member is
  living as a spouse or civil partner)

- Members with a significant personal interest may participate in
  the discussion and vote on that matter unless that interest could
  be reasonably regarded as prejudicial.

4   PROCEDURAL MATTERS

a   MEMBERS' QUESTIONS

The deadline for Member's questions is 12pm four working days before
the meeting (22 January 2025).

b   PUBLIC QUESTIONS

The deadline for public questions is seven days before the meeting
(21 January 2025).

c PETITIONS

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

d REPRESENTATIONS RECEIVED ON REPORTS TO BE CONSIDERED IN PRIVATE

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

5 REPORTS FROM SELECT COMMITTEES, TASK GROUPS AND OTHER COMMITTEES OF THE COUNCIL

(Pages 19 - 26)

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

  A. Scrutiny of 2025/26 Draft Budget and Medium-term Financial Strategy to 2029/30 (Cabinet Response to Select Committee Recommendations)

  B. Referral of County Council Motion to Cabinet (Motion 11 iii)

6 LEADER / DEPUTY LEADER / CABINET MEMBER/ STRATEGIC INVESTMENT BOARD DECISIONS TAKEN SINCE THE LAST CABINET MEETING

(Pages 27 - 30)

To note any delegated decisions taken by the Leader, Deputy Leader, Cabinet Members, Strategic Investment Board and Committees in Common Sub-Committee since the last meeting of the Cabinet.

7 CABINET MEMBER OF THE MONTH

(Pages 31 - 34)

To receive an update from Cllr Sinead Mooney, Cabinet Member for Adult Social Care.

8 2025/26 FINAL BUDGET AND MEDIUM-TERM FINANCIAL STRATEGY TO 2029/30

(Pages 35 - 178)

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 Full Council on 4th February 2025. Cabinet is required to recommend a budget to Council for consideration at this meeting.

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

9   COMMUNITY RISK MANAGEMENT PLAN (CRMP) 2025-2030   (Pages 179 - 400)

This report is being delivered following staff and public consultation on the next strategic plan for SFRS. This plan, known as the CRMP, will replace the current strategic plan known as the Making Surrey Safer Plan (MSSP) (2020-2024).

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

10   ADMISSION ARRANGEMENTS FOR SURREY'S COMMUNITY AND VOLUNTARY CONTROLLED SCHOOLS FOR SEPTEMBER 2026 AND SURREY'S RELEVANT AREA   (Pages 401 - 466)

The purpose of this report is to ask Cabinet to make recommendations to Full Council on the admission arrangements that will apply for Surrey's community and voluntary controlled infant, junior, primary and secondary schools for admission in September 2026, as well as a determination on Surrey's Relevant Area.

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

11   EVERYDAY LIVING OPPORTUNITIES   (Pages 467 - 496)

Cabinet is asked to approve the commissioning and procurement strategy for supporting everyday living for adults and young people in transition with eligible needs, through a Light Touch Regime procurement process.

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

N.B There is a Part 2 report at Item 16.

12   TECHNOLOGY ENABLED CARE AND HOMES (TECH)   (Pages 497 - 558)

This report seeks Cabinet approval for the future delivery of the TECH strategic approach and long-term delivery plans.

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

13   DISPOSAL OF QUADRANT COURT, 35 GUILDFORD ROAD, WOKING, GU22 7QQ

This report seeks approval of Cabinet to the freehold disposal of Quadrant Court, Woking 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 17.

14   2024/25 MONTH 8 (NOVEMBER) FINANCIAL REPORT

This report provides details of the Council's 2024/25 financial position, for revenue and capital budgets, as at 30th November 2024 (M8) 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)

15   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.

P A R T   T W O - I N   P R I V A T E

16   EVERYDAY LIVING OPPORTUNITIES

Cabinet is asked to approve the commissioning and procurement strategy for supporting everyday living for adults and young people in transition with eligible needs, through a Light Touch Regime procurement process.

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

17   DISPOSAL OF QUADRANT COURT, 35 GUILDFORD ROAD, WOKING, GU22 7QQ

This report seeks approval of Cabinet to the freehold disposal of Quadrant Court, Woking following an open marketing campaign.

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

18   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: 20 January 2025

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.

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

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

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.

This page is intentionally left blank

**MINUTES OF THE MEETING OF THE CABINET
HELD ON 17 DECEMBER 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.

<u>Cabinet Members</u>

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

<u>Deputy Cabinet Members:</u>

*Maureen Attewell
 *Paul Deach
 *Steve Bax
*Jonathan Hulley

<u>Members in attendance:</u>
Cllr Trefor Hogg, Chairman of the Adults and Health Select Committee
Cllr Jeremy Webster, Vice Chairman of the Children, Families, Lifelong Learning & Culture Select Committee
Cllr Steven McCormick, Vice Chairman of the Resources and Performance Select Committee

**PART ONE
<u>IN PUBLIC</u>**

178/24 APOLOGIES FOR ABSENCE [Item 1]

There were no apologies.

179/24 MINUTES OF PREVIOUS MEETING: 26 NOVEMBER 2024 [Item 2]

These were agreed as a correct record of the meeting.

238

180/24 DECLARATIONS OF INTEREST [Item 3]

There were none.

181/24 PROCEDURAL MATTERS [Item 4]

The Leader read out a statement in relation to the death of Sara Sharif in Woking.

The Leader stated that at times, members, staff and residents are faced with the toughest of circumstances and the most difficult news to digest. A moment was taken to recognise the horrendous details that had emerged regarding the unspeakably sad death of Sarah Sharif in Woking. Whilst some sense of justice could be taken that the evil perpetrators had been convicted and sentenced, the details that came out of the trial would never be forgotten. Now the trial had concluded, the local child safeguarding practice review would proceed. Partners including the police, health, social care and education, amongst others, under an independent author, would review the practice of all agencies involved with the family and identify any learning. The safety, well-being and care of children and young people was of the utmost importance to the Council. The Council would play a full and active role in the review to truly understand the wider circumstances around Sara's life and tragic death. The Council would always strive to improve how things are done and would do everything in its power to ensure the children are kept safe in the county. Any and every lesson that is learned through the local child safeguarding practice review would be acted upon.

182/24 MEMBERS' QUESTIONS [Item 4a]

There were none.

183/24 PUBLIC QUESTIONS [Item 4b]

There was one public question. A response from the Cabinet was published in the supplementary agenda. The questioner asked a supplementary question which was why would there routinely be a need to have additional evidence at appeals if the local authority had fulfilled their statutory duty to provide an effective assessment and process which fully identified the needs and outcomes of the children. The Cabinet Member for Children, Families and Lifelong Learning stated that the decisions being made by the Council were entirely lawful. Any tribunal decisions which overturned a Council decision did not mean that the original decision taken by the Council was unlawful. The Leader stated that the percentage of appeals that are won in whole or in part in the Council reflect the same percentage nationally which showed the system was not working for families, children and Councils.

184/24 PETITIONS [Item 4c]

There were none.

185/24 REPRESENTATIONS RECEIVED ON REPORTS TO BE CONSIDERED IN PRIVATE [Item 4d]

There were none.

186/24 REPORTS FROM SELECT COMMITTEES, TASK GROUPS AND OTHER COMMITTEES OF THE COUNCIL [Item 5]

The Chairman of the Adults and Health Select Committee, Trefor Hogg introduced the budget recommendations from the Adults and Health Select Committee explaining that there was extraordinary pressures on the Adults Wellbeing and Health Partnerships budget which showed the net expenditure budget requirement rising by £18.5m to £524.5m in 2025-26. It was essential that the rollout of Technology Enabled Care across Surrey was encouraged to ensure better outcomes for residents. There was a recognition that changes to National Insurance and the national living wage would impact the care market and in turn impact the Council. How the Council works with the NHS needed to be factored so there is one team approach. Overall, the Select Committee felt that very strong Risk Management processes with strong independent monitoring and reporting was required to keep strict control of the risks with a focus on effective early action to correct problems.

The Leader stated that the expectation was that the increase in national insurance and the national living wage for Council employees would be reimbursed by the government but this may not extend to providers. The Government had announced £680m of additional funding into the adult social care in the budget but Surrey would get no greater than £10m of this. The majority of this would be wiped out by increased costs from providers. The Leader announced that the Government had published a white paper in relation to English devolution which sets out the government's direction of travel, which will be the first major reform of the structure of local government since 1974. The Government had requested submissions from all two tier authorities on what they believe devolution would look like. The Leader also touched upon public service reform and the council's relationship with the NHS moving forward.

The Vice Chairman of the Children, Families, Lifelong Learning and Culture Select Committee, Jeremy Webster introduced the budget report in the absence of the Select Committee Chairman. In addition to a macro level review of the children, families, lifelong learning and cultural budget, the Select Committee chose to explore early help preventive spending and the impact of proposed funding changes on the voluntary, charity and social enterprise infrastructure organisations

240

as its deep dive topics. The Vice-Chairman spoke on the deep dive recommendations before turning to the recommendations on the overall CFLLC budget. The committee was convinced that the value of early help improves outcomes for children and also reduces statutory demand in the long term. The Committee recommended that this spend was protected from statutory pressures. The Select Committee wanted to undertake a deep dive on voluntary sector funding but scrutiny was inhibited when a briefing on these changes promised in October was not made available to the Committee. The Committee recognised the constraints on the Councils budget and urged the Cabinet to consider any and all opportunities to extend the budget envelope proposed for the Directorate to provide further discretionary funding being ring fenced for early years funding. The Leader thanked the Vice Chairman for his update stating that the councils primary priority is to discharge its statutory functions and secondly was around investment in prevention and early intervention. He noted that there would be some additional information within the Local Government Settlement around additional funding for children's preventative services. The Leader stated that the Council had no intention to reduce frontline staff.

The Vice Chairman of the Resources and Performance Select Committee, Steven McCormick introduced the budget report and recommendations from his Select Committee stating that the Committee had conducted a meticulous and comprehensive scrutiny of the Council's budget to ensure financial sustainability and efficiency. The Select Committee challenged officers on the deliverability of efficiencies, particularly those planned for 2024/25 and had been assured of a more rigorous governance framework to hold directorates accountable for these planned efficiencies. The Select Committee also scrutinised the Council's capital expenditure, noting the conscious effort to reduce capital financing costs in the revenue budget. Risk management had also been a focal point of the Select Committees scrutiny. The Select Committee also identified significant risks, including potential funding reform, the need to deliver efficiencies, and external economic factors such as inflation and interest rates. To mitigate these risks, the Council had established robust measures, including maintaining healthy reserves and a £20 million contingency fund, to ensure financial stability. The Committee had also scrutinised the transformation programme to ensure it will deliver long-term efficiencies.

The Leader explained that the Government had announced that from 2026 onwards there would be multi year settlements. A funding review consultation on this had been launched. Funding had been set aside for adult social care but would be distributed via a funding formula which accounts for areas of high levels of deprivation. The Leader explained that this new formula would mean that the Council would not receive any funding even though there was deprivation in the county. There was also an expectation that the Council should optimise the Council Tax it raises locally which would mean that the Council would be

241

expected to raise Council Tax to the maximum level every year. The Leader stated that he believed that the criteria for distributing funding needed to be widened or the Council would face very challenging times ahead. The Select Committees were thanked for all their input and work into to the draft budget which was welcomed.

RESOLVED:

1. That the Scrutiny of the 2025/26 Draft Budget And Medium-Term Financial Strategy To 2029/30 report be noted.

187/24 LEADER / DEPUTY LEADER / CABINET MEMBER/ STRATEGIC INVESTMENT BOARD DECISIONS TAKEN SINCE THE LAST CABINET MEETING [Item 6]

There were seven decisions for noting.

RESOLVED:

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

188/24 CABINET MEMBER OF THE MONTH [Item 7]

A Cabinet Member of the Month update was provided by the Cabinet Member for Highways, Transport and Economic Growth. The following key points were made:

- The Horizon Road and pavement programmes were on track with over half of the planned programme completed by the end of September, equating to 92 miles of roads and 29 miles of pavements. In addition, 24 miles of roads had been resurfaced through our patching programmes and in response to several diesel spills. In addition to our resurfacing programmes, we have also completed 39,987 pothole repairs between 1st April and 30th November.
- A comprehensive environmental maintenance plan had been developed, which includes additional flailing works, as well as the introduction of our new "Roadside Rangers", who will focus specifically on improving the visual quality of the County's highways. Initially, two Roadside Ranger teams were established, but due to the success of this initiative, it has been increased to eight crews as of 25th November 2024.
- So far this year, nearly 12m bus journeys had been made. Underpinning patronage growth is our close partnership working with bus operators, which has seen joint investment in more zero emissions buses, coupled with Council investment for better local bus services and more DDRT, alongside the application of our BSIP funding from Government to support service enhancements. The Cabinet Member announced a new funding

242

award of £12m for 2025/26 that will be invested in better bus services delivering the aspirations set out in our BSIP.

- The Safer Travel Team had won Team of the Year at the national Modeshift Sustainable Travel Awards for the development and roll out of the Feetfirst Child Pedestrian Training programme. In the current academic year, we are expecting to train more than 6,000 year three pupils at over 120 schools across the county; nearly half the target cohort.
- In its first year of delivery, the Surrey Careers Hub increased performance across all Gatsby Benchmarks and reached its target of 90% of schools achieving at least 3 of these nationally recognised Benchmarks.
- The Leader commented that the team had been doing a good job in proactively dealing with potholes.

RESOLVED:

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

189/24 SURREY SCHOOLS AND EARLY YEARS FUNDING 2025-26 [Item 8]

The Cabinet Member for Children, Families and Lifelong Learning explained that the report sets out the recommended funding formula principles for Surrey's mainstream schools and the early years providers for 2025/2026. The funding of all Surrey schools (including academies) and the funded entitlement to early years nursery provision are provided from the council's allocation of Dedicated Schools Grant (DSG). Each local authority is required to consult on and maintain local formula arrangements to allocate DSG to mainstream schools and early years providers. The Safety Valve agreement includes a 1% block transfer from the schools' block of the DSG to the High Needs block in each year of the five-year term of the agreement. Although schools do not have formal right of approval over the request, the Council is required to consult schools and to share the outcome with the Secretary of State. Each local authority is required to consult on and maintain those local formula arrangements to allocate the DSG to our local schools. The Council consults through the schools forum, which is a statutory body which is consulted every year on how the grant should be allocated to each school. It was explained that the report did not address pupil premium or sixth form funding as this was covered by central government.

The Leader explained that the Council was yet to receive Capital funding promised by the government to enable us to build more school facilities. This was an integral part of the safety valve agreement. The Council would continue to push for this funding.

RESOLVED:

1. That Cabinet notes and supports the application to the Secretary of State to transfer 1.0% (which was equivalent to £8.4m in 2024/25) from the schools' block DSG to the High Needs block DSG, as set out in the safety valve agreement with the Department for Education (DFE).

2. That the Schools Forum's formula recommendations for schools as set out in Annex 3, is approved by Cabinet; and the decisions in Annex 4 implemented, subject to any changes required to comply with the DfE provisional schools funding settlement announced on 28 November 20243   The proposals agreed by the Schools Forum for additional funding for mainstream schools with disproportionately high incidence of special educational needs and disabilities (SEND) are agreed.

3. That the introduction of additional funding for primary schools with temporary falls in rolls is supported by Cabinet as agreed by the Schools Forum.

4. That the principles of the early years funding formula, supported by the Schools Forum, is approved by Cabinet.

5. That authority is delegated to the Director of Education and Lifelong Learning in consultation with the Executive Director of Children, Families and Lifelong Learning and the Cabinet Member for Children, Families and Lifelong Learning to approve amendments to the funding rates in the schools formula and early years funding formula, as appropriate, following receipt of the DSG settlement and DfE pupil data in December 2024. This is to ensure that total allocations to schools under this formula remain affordable within the council's DSG settlement and to meet the DfE deadline of mid-January for submission of proposed school budgets to the DFE and the expected deadline for confirmation of early years funding rates, currently expected to be 28 February 2025.

Reasons for Decisions:

To comply with DfE regulations requiring formal council approval of the local funding formula for Surrey's primary and secondary schools and to allow budgets for schools to be submitted to the DfE by the deadline of 22 January 2025 and funding rates for early years providers to be set by the required deadlines.

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

244

190/24 CLIMATE CHANGE PROGRESS ASSESSMENT 2023/4 [Item 9]

The Cabinet Member for Environment introduced the report which sets out the key findings of the third annual climate change programme progress assessment since Surrey County Council declared a Climate Emergency in 2019 and the Greener Futures Climate Change Delivery Plan 2021-2025 (the Delivery Plan) was published in 2021. The Cabinet Member explained that lots of positive change had been made in supporting residents and businesses to reduce their carbon emissions in line with the net zero 2050 target. It was explained that the team had gone above and beyond to help the Council deliver against the net-zero targets as set out in the Greener Futures Climate Change Delivery Plan and should be commended for the work undertaken. There was a recognition that inflation would impact work to combat climate change. The Leader requested that the Cabinet Member for Environment write to the Leaders of District and Boroughs explaining the work that had been done to support the Delivery Plan and how they could support this work. The Cabinet Member explained that the Greener Future Partnerships had been set up with District and Boroughs to tackle climate change but there had been some struggles.

RESOLVED:

1. That Cabinet continues to deliver against the net-zero targets as set out in the Greener Futures Climate Change Delivery Plan 2021-2025– noting the key recommended areas of focus.

2. That Cabinet approves bringing forward the development of the next 5-year Greener Future Climate Change Delivery Plan (2026-31), for Cabinet consideration in 2025.

Reasons for Decisions:

The Delivery Plan commits to undertaking an annual assessment of progress on the plan for Cabinet. Whilst it has not changed, the progress report identifies where the council and its partners need to focus attention to address the most challenging areas and ensure the Delivery Plan is as impactful and cost effective as possible and within the resources available. The Delivery Plan is also an opportunity to identify those areas where Surrey County Council and its partners need to lobby Government. The current Delivery Plan runs up to 2025/6 which triggers a substantial review of the programme and preparation of a new Delivery Plan, setting out the actions to be delivered over the next 5 years on the council's net-zero journey.

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

191/24 ANNUAL PROCUREMENT FORWARD PLAN FY2025/26 [Item 10]

The Cabinet Member for Finance and Resources introduced the report explaining that the revised Procurement and Contract Standing Orders agreed by the Council in May 2019 (and further revised in March 2023) required the preparation of an Annual Procurement Forward Plan (APFP). The APFP had been developed for 2025/26 and Cabinet was being asked to approve the plan to allow implementation of the identified procurement activity. It was explained that Annex 2 indicated upcoming projects for 2026/2027 pipeline and were for information purposes only. Under the new Procurement Legislation (Procurement Act 2023), which comes into effect on the 24 of February 2025, the Council will be required to publish a Mandatory Pipeline Notice by 26 May each year, covering a minimum of 18-month overview of planned procurements over £2M. The Leader explained that Cabinet Members had been provided with a list of procurement projects in advance of the meeting and had an opportunity to go through each in detail with officers.

RESOLVED:

1. That Cabinet gives Approval to Procure for the projects listed in Annex 1 – "Annual Procurement Forward Plan for FY2025 26" in accordance with the Council's Procurement and Contract Standing Orders.

2. That Cabinet agrees that where the first ranked tender for any projects listed in Annex 1 is within the +5% budgetary tolerance level, the relevant Executive Director, Director, or Head of Service (as appropriate) is authorised to award such contracts.

3. That Cabinet agrees the procurement activity that will be returned to Cabinet prior to going out to market (Annex 1, column R).

4. That Cabinet notes appropriate projects will be presented to Cabinet or the Strategic Investment Board for approval of the business case.

5. That Cabinet notes projects identified in Annex 2 "Annual Procurement Forward Plan for FY 2026/27 Pipeline" are for information only.

Reasons for Decisions:

- To comply with the Procurement and Contract Standing Orders agreed by Council in May 2019 and further revised in March 2023.
- To provide Cabinet with strategic oversight of planned procurement projects for FY2025/26.

246

- To ensure Cabinet oversight is focussed on the most significant procurements.
- To avoid the need to submit multiple individual requests for Approval to Procure as well as individual contract award approvals for work taking place in FY2025/26.
- To inform Cabinet of projects identified for FY2026/27.

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

192/24 SURREY ENVIRONMENT PARTNERSHIP AND JOINT WASTE SOLUTIONS [Item 11]

The Cabinet Member for Property, Waste and Infrastructure introduced the report explaining that the part 1 report sets out Surrey County Council's plans for the future of some administrative and project management services currently provided on behalf of Surrey County Council by the Joint Waste Solutions team. The published report required one clarification in paragraph 12b of the report, with reference to the re-procurement of the waste collection service. This paragraph should refer should state that the four authorities are working together to consider options for the delivery of waste collection services after the expiry of the Amey contract in 2027. A number of functions were transferred to Joint Waste Solutions including project management, communications and website hosting. The current arrangement was no longer felt suitable to meet the strategic needs of Surrey County Council in reducing its exposure to policy changes, namely the extended producer responsibility scheme and the emissions trading scheme. The Council supported the concept of closer partnership working with District and Boroughs and believed this could be better secured by the Council managing activities.

The Leader stated that there had been a number of discussions about this with District and Boroughs. A number of efficiencies could be delivered by bringing the service in-house which would not negatively impact service delivery.

RESOLVED:

1. That Cabinet agrees the principle of SCC bringing back the Functions and associated funding to SCC and to delegate authority to the Executive Director for Environment, Property & Growth in consultation with the Deputy Chief Executive and Executive Director of Resources and the Director of Law and Governance to take such actions and decisions as are necessary to facilitate the manner and mechanisms through which this decision can be most suitably implemented.

Reasons for Decisions:

- Surrey County Council ('SCC') transferred several of its activities ("Functions"), to encourage better recycling, to the JWS team in 2018 through an Inter Authority Agreement. As part of the process, six full time employees of SCC staff were TUPE transferred to SHBC to undertake the Functions for JWS.

- JWS is the partnership organisation which manages a joint waste collection contract with Amey on behalf of Surrey Heath, Elmbridge, Mole Valley and Woking Councils. Surrey Heath Borough Council ("SHBC") hosts JWS and provides line management and back-office functions (e.g. HR).

- The Functions transferred include activities to encourage better recycling by Surrey residents: communications and website hosting; data gathering and interpretation; project administration and governance; processing of some payments; and encouragement of food waste collections.

- The wider Surrey Environment Partnership ("SEP") forum includes all eleven District and Boroughs ('D&Bs') as the Waste Collection Authorities ("WCA") for Surrey, and the group comes together with SCC at a number of meetings over the year. These meetings are part of the Functions and will be organised by SCC going forward if this recommendation is approved.

- The current arrangement is no longer felt suitable to meet the strategic needs of SCC in reducing its exposure to policy changes. Policy measures will have a disproportionate impact on SCC as the Waste Disposal Authority ("WDA"). To mitigate these, SCC needs to: engage with the public (communications, recycling behaviour); have access to data; and to have financial control on project expenditure.

- SCC clearly supports the concept of partnership with the D&Bs and would like to see a closer and more effective relationship with all 11 Councils. However, SCC feels that as long as the Functions and SEP administration remains subsumed within JWS (and hosted by Surrey Heath BC) then the wider strategic needs of the SCC will not be met.

- The recommendation to SCC members is to relocate the Functions back into SCC, noting that this could involve the transfer of affected staff under TUPE transfers and some reorganisation of the service. Officers believe this would allow

248

JWS to focus on its needs, and for SCC to mitigate its exposure to potentially very costly waste policy changes.

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

193/24 2024/25 MONTH 7 (OCTOBER) FINANCIAL REPORT [Item 12]

The report was introduced by the Cabinet Member for Finance and Resources. At the end of Month 7 the Council was forecasting an overspend of £17.7m against the 2024/25 revenue budget. This was a £0.9m improvement on the M6 position. All Directorates were continuing to work on developing mitigating actions to offset forecast overspends. The Cabinet Member gave an update on the areas where there had been a forecast overspend. In addition to the forecast overspend position, emerging risks and opportunities were monitored throughout the year. Directorates have additionally identified net risks of £11.1m, consisting of quantified risks of £11.9m, offset by opportunities of £0.8m. This is an increase in net risks of £0.6m from M6. In order to ensure ongoing financial resilience, the Council held a corporate contingency budget and over recent years had re-established an appropriate level of reserves. If the contingency budget was not required in full, then any balance would be transferred to reserves to further improve financial resilience and provide funding for future investment. At Month 7, capital expenditure of £332m was forecast for 2024/25. This was £10.9m more than the re-phased budget. The overall financial picture was still challenging but the Cabinet Member was confident that expenditure was under control.

The Leader thanked staff for all their hard work and support over the year. The Leader wished everyone a peaceful Christmas and New year.

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)

194/24 EXCLUSION OF THE PUBLIC [Item 13]

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.

195/24 ANNUAL PROCUREMENT FORWARD PLAN FY2025/26 [Item 14]

A part 2 report was presented by the Cabinet Member for Finance and Resources who provided a brief update on the commercially sensitive procurement projects within the annex.

RESOLVED:

See Minute 190/24

Reasons for Decisions:

See Minute 190/24

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

196/24 SURREY ENVIRONMENT PARTNERSHIP AND JOINT WASTE SOLUTIONS [Item 15]

A part 2 report was presented by the Cabinet Member for Property, Waste and Infrastructure who explained that the part 2 report recommends withdrawal of the administration and project management functions carried out by Joint Waste Solutions. These functions would be brought back in house to Surrey County Council. Further details were given around the contract and impacts of the changes.

RESOLVED:

See Minute 191/24.

Reasons for Decisions:

See Minute 191/24.

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

197/24 PUBLICITY FOR PART 2 ITEMS [Item 16]

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

250

2

Meeting closed at 3.21 pm

_____
Chairman

**MINUTES OF THE MEETING OF THE CABINET
HELD ON 8 JANUARY 2025 AT 2.30PM
COUNCIL CHAMBER, WOODHATCH PLACE,
11 COCKSHOT HILL, REIGATE, SURREY, RH2 8EF**

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

Members: (*present)

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

Deputy Cabinet Members

*	Maureen Attewell
*	Steve Bax
*	Paul Deach
*	Jonathan Hulley

Members in attendance:

Cllr Fiona Davidson, Chairman of the Children, Families, Lifelong Learning and Culture Select Committee
Cllr Jonathan Essex, Leader of the Green Party Group
Cllr Robert Hughes, Chairman of the Resources and Performance Select Committee
Cllr Catherine Powell, Leader of the Residents Association/Independent Group

**PART ONE
IN PUBLIC**

1/25   APOLOGIES FOR ABSENCE [Item 1]

Apologies for absence were received from Marisa Heath.

2/25   DECLARATIONS OF INTEREST [Item 2]

There were none.

3/25   RESPONSE TO THE ENGLISH DEVOLUTION WHITE PAPER [Item 3]

The report was introduced by the Leader of the Council, who noted that the Government's English Devolution White Paper, published on 16 December

2024, and the subsequent letter from the Minister for Local Government and English Devolution set a clear direction for two-tier areas to move towards establishing unitary authorities as a means of delivering devolution.

He summarised the timetable set out by the Government, whereby all two-tier authorities were asked to submit interim local government reorganisation (LGR) proposals by March 2025, with final proposals in either May 2025 or Autumn 2025 depending on whether councils were accepted onto an accelerated programme. Councils on the accelerated programme would be expected to introduce shadow unitary authorities in May 2026, which would mean the potential postponement of the May 2025 elections. Any postponement of elections would be a decision for the Government requiring the laying of secondary legislation before Parliament.

The Leader highlighted the importance of ensuring that any proposals were in the best interests of Surrey residents. This would involve considerable work with district and borough councils, as well as partners in the NHS and Surrey Police. Discussions would need to start now if we are to achieve the March deadline. It was recognised that it would be a challenge to find a solution that all partners could agree on. The situation was complicated by the issue of debt in some district and borough councils, and it was proposed that the letter to the Minister would be amended to request that the Government write off the debt of such councils.

He went on to emphasise that the timetable had been set out by Government and was not the council's choice; however, there was a necessity to engage with the Government and use leverage in order to avoid a unitary solution being imposed. Work would begin to establish a steering group and working groups with the 11 district and borough councils, and officers had already been tasked with drawing up terms of reference for these.

The Leader added that the County Council had been given the opportunity that morning to debate the report at an Extraordinary Meeting, and had voted in favour of writing to the Minister.

The Cabinet expressed their support for the recommendations. Key points raised included:

- The importance of achieving the best deal possible for Surrey.
- The inevitability of the introduction of unitary authorities, and the importance of engaging with the Government early in the process in order to maintain some control.
- Many residents would appreciate the clarity of dealing with one council for all matters as the current two-tier system could be confusing.
- The Government would consult with local residents on any proposals, and local authorities would be expected to support this process.
- The collective debt of some district and borough councils, and the reduction in their revenue streams meant that timely action was required.
- The opportunity this presented to shape the future of Surrey and ensure that residents are better off in future.
- Postponing the May 2025 elections would enable detailed proposals to be drawn up and consulted on, freeing up officer time and avoiding the restrictions of the pre-election period. Even if the election were to go

ahead, proposals would still be required by the autumn, and a newly elected cohort of councillors would be required to mobilise very quickly to prepare proposals. The current cohort of councillors had the skills, experience and knowledge of their local areas and were best placed to take the work forward.

- Misgivings around the timetable were expressed, but it was accepted that this was not the council's decision.
- Holding an Extraordinary Council to discuss this issue had been a significant step forward and it was important for residents and staff that all elected Members were given the opportunity to express their views. Although there was disagreement about the postponement of elections, there were very few dissenting voices regarding the introduction of unitary local government.
- Surrey County Council has a strong record on public engagement which it will use to support the Ministerial consultation.
- The draft letter is diligent and considerate, and sets an appropriate tone.
- Devolution provides an opportunity to take action on matters important to residents, including integrated transport, congestion, planning and housing.
- The current local government structure has hampered delivery for residents in many areas.
- The 11 district and borough councils estimate that the combined cost of running the county council elections on behalf of SCC was around £2.5 million. This cost would be incurred by SCC if the elections were to go ahead, so postponement would represent a cost saving.
- The hard work of all SCC, district and borough council staff was acknowledged. The Leader noted that the uncertainty of this situation was unhelpful for staff, and that the sooner the position could be clarified, the better.

RESOLVED:

That the Cabinet:

1. Agreed that the Leader should respond to the Government as outlined in the letter set out in Annex 2, as amended below:

    "A postponement of the county elections will also allow time to give consideration in any business case to how we can best manage the unique, significant financial risk of the level of debt currently held across the Surrey local government footprint. Any proposals for local government reorganisation will need to adequately consider how to ensure the sustainable operation of any new authority/ies ~~in the absence of exceptional financial support from Government or a level of write off~~ **and we will request the government to write off those debts.**"

Reasons for decisions:

The English Devolution White Paper presents an important opportunity for Surrey County Council to bring more expansive and flexible devolved powers and funding into the county for the benefit of residents. As such it is recommended that Cabinet agrees to respond to the Minister's letter (Annex

1) requesting the postponement of the 2025 County Council elections to allow the Surrey County Council Leader time to work with district and borough Leaders to develop a proposal for local government reform that will unlock the benefits of further devolution for Surrey.

The function of deciding whether and how to respond to the Minister's letter of 16 December 2024 is an executive function as set out in the Constitution under Responsibility for Executive Functions (Part 3), the Cabinet has the power to provide formal response to any Government White Paper "…likely to lead to policy changes or have impact upon service not otherwise delegated to officers" (Scheme of Delegation 8.2 (L)).

(In accordance with Standing Order 56.1 (Special Urgency), the Chairman of the Resources and Performance Select Committee has agreed that the decisions on this item cannot reasonably be deferred and therefore it is not subject to call in.)

4/25   EXCLUSION OF THE PUBLIC [Item 4]

There were no Part 2 items.

5/25   PUBLICITY FOR PART 2 ITEMS [Item 5]

There were no Part 2 items.

Meeting closed at 15:30

_____
Chairman

CABINET- 28 January 2025

Cabinet Response to the Recommendations from Select Committees Following Scrutiny of the Draft Budget Proposals in December 2024.

<u>**Adults and Health Select Committee**</u>

Adult Social Care:

I.   It is recommended that strong and effective Risk Management is treated as a key requirement to ensure that Surrey's Adult Social Care Services remain sustainable while delivering the services needed by Surrey's residents.

Cabinet Response:
Strong and effective risk management is essential to ensure the sustainability of Surrey's Adult Social Care Services while meeting residents' needs. Risk management in our services involves both mitigating potential negative outcomes and identifying opportunities for improvement. Our approach includes regular risk assessments, stakeholder engagement, scenario planning, and maintaining a risk register to track and manage identified risks. This proactive approach helps us address challenges such as financial pressures, staffing issues, and demographic shifts.

Data plays a critical role in both risk management and validating the impact of our services. We use data-driven insights to track service usage patterns, identify emerging risks, and monitor key performance indicators aligned with resident outcomes. We are also using predictive analytics to help us model future trends and assess how external factors may impact service delivery.
To ensure that changes and initiatives are effective, we test their impact on residents. This includes pilot programs, co-design with residents and user groups as well as commissioning independent evaluations such as using the Local Government Association to measure the impact on service users, identifying unintended consequences and then refining approaches. This helps us refine services and ensure that the voices of residents and their families are central to decision making. By evaluating the effectiveness of changes, we can quickly adjust strategies and maintain responsiveness to evolving needs.

II. It is recommended that Needs Assessment is appropriately resourced and robust as it is central to the reduction of costs and at the same time it is essential the weaknesses identified by the CQC are rectified.

Cabinet Response:
The improvements required and identified by the CQC regarding Needs Assessment will be delivered through the transformation and improvement programme in AWHP. This will include resourcing and robust scrutiny of the plans to ensure they remain on track and deliver the required outcomes.

III. A plan will be required within the next six months for review, to support the provision of Technology Enabled Care in areas where the provision of appropriate telecommunications services is weak or lacking.

Cabinet Response:

The plan for how the digital switch over is being managed, delivery progress and how issues around connectivity gaps are being addressed within this work will be presented to the committee within the next six months.

IV.   It is recommended that there is investment in the tracking of spending.

Cabinet Response:
We welcome this recommendation but can offer assurances that robust budget monitoring is already in place.

Children, Families, Lifelong Learning & Culture (CFLLC) Select Committee

I.   The Committee notes the significant pressures on the Directorate's budget of pay inflation, and the efficiencies planned through staff restructuring. As the EIA is not yet available for the planned restructuring we are concerned at the impact on front line staff and at the risk that we will not have sufficient capacity to deliver vital preventive and statutory services. We are aware of high vacancy rates for social workers, with only some of these roles covered by agency staff.

Cabinet Response:
Cabinet notes the Select Committee's comments. We can confirm that an EIA is required before all restructures.

II.   The Committee was reassured that frontline staff (including social workers, SEND caseworkers and residential caseworkers or alternatively qualified professionals) have been exempted from recruitment controls. It is important to the Committee that plans do not impact the continuing need to improve our communications and responsiveness in the area of additional needs and disability (SEND).

Cabinet Response:
Cabinet notes the Select Committee's comments.

III.   We are aware that there has been some growth in senior roles over the past few years and we recommend that restructuring does not disproportionately fall on front line roles which are so vital to the delivery of services.

Cabinet Response:
Cabinet notes the Select Committee's comments.

IV.   The Committee recommends that recruitment into vacant – or currently agency filled - front line roles is prioritised, and that difficulty recruiting some roles does not lead to budget being redirected or reallocated away from the frontline.

Cabinet Response:
Cabinet notes the Select Committee's comments. We can confirm that recruitment to front-line roles is prioritised.

Culture Budget

V.   The Committee notes the success of the transformation programme which had delivered significant efficiencies whilst also transforming libraries into inclusive hubs for the community giving access to a range of community events and services.
Cabinet Response:

Cabinet notes the Select Committee's comments.

VI.   The Committee welcomes and supports the new partnerships and funding streams that are being developed to deliver additional services.

Cabinet Response:
Cabinet notes the Select Committee's comments.

VII.   The Committee recommends that the 2025/26 CDC Budget and MTFS should ensure there are sufficient staff to provide community hubs, identified as an important aspect of the libraries' strategy and a key factor in helping to reduce isolation in society.

Cabinet Response:

There are existing resources assigned to specific community hub developments where that includes a library facility as part of the further implementation of the Libraries' transformation. Building on the success of this approach to date, additional future opportunities to make better use of community-based facilities will be identified and progressed through the One Council Transformation Programme. This will include the funding and staffing model required to deliver impact and value, with an expectation this is met through re-direction and re-prioritisation of existing council resources.

Communities, Environment & Highways Select Committee

I.   The Committee is very concerned about the deprioritisation of Greener Future's spend in the budget.

Cabinet Response:
Much of the work undertaken by the Greener Futures team is funded through grants, capital schemes or recharging. Efficiencies will result in a small reduction in staffing and in non-staffing budgets in relation to the 2050 net zero targets only. The impact of the efficiencies will be kept to a minimum as some of this work can be continued in partnership with other organisations, such as the South East Net Zero Hub.

Officers are starting to develop the next five-year Climate Change delivery plan, which will be brought to Select Committee in the summer and Cabinet thereafter. This will set out the priorities which the service can deliver with the resources that are available as well as highlight where there may be gaps where more funding will be needed. Further opportunities to bid for or leverage central government funding will be considered, especially as part of any devolution deal, to mitigate any funding gaps to support our net zero ambitions. In addition, a strong lobbying strategy will be developed to highlight shortfalls in funding and finance.

II.   Supports the investment in additional verge maintenance and area clear up gangs.

Cabinet Response:
Cabinet notes the views of the Select Committee. The budget includes significant investment in highways services including enhanced verge maintenance and area clear up gangs.

III.   Repeats its recommendation to reconsider expansion of Digital Demand Responsive Travel and further investment in light of the extreme financial challenges outlined in the draft budget papers, noting that Digital Demand

Responsive Travel investment is identified as a continued priority in Cabinet response to Committee's November recommendations and in the budget papers.

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 to 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.

IV. Supports the re-set of capital expenditure plans to bring down the capital debt financing requirement. This was highlighted by the Committee as an area of concern in its budget deep dive conclusions and recommendations.

Cabinet Response:
Cabinet notes the views of the Select Committee. 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 over the medium term.

V. In light of the large contracts that account for a large proportion of Environment Infrastructure & Growth's (EIG)'s spend, the Committee recommends a greater focus on driving value out of large Council contracts.

Cabinet Response:
Many large EIG contracts have been competitively tendered in recent years which allows the Council to evaluate the cost of providing the service(s) against the market as part of the selection process. In addition to tender stage, there is a regular focus on value for money throughout a contract's lifecycle, and a greater emphasis on contract management and other value based elements including Social Value, reducing carbon emissions and delivering continuous and ongoing improvements including bringing forward innovations from the respective sector of the contract.

VI. Recommends that Members be advised of any changes to the capital programme that affect their divisions.

Cabinet Response:
Not all capital programmes are split by division, however where possible local members should always be advised of changes to the capital programme that

affects their division. This includes updating local members on capital scheme progress, rescoping or any other significant change as is already current practice.

Resources and Performance Select Committee

I. The select committee welcomes the council's work to deliver a balanced budget in an extremely challenging financial context through aligning revenue budgets, capital investment and transformation plans within both Directorates and the organisation and recommends that this integrated approach continues to be employed in future years.

Cabinet Response: Cabinet notes the Select Committee's comments

II. The select committee appreciates the importance of ensuring continued financial resilience to protect services for residents and the important progress made to close the budget gap to the remaining £17.4m, but recognises that the Council will need to make difficult decisions to close the gap that is likely to continue to grow over the remainder of the medium term.

Cabinet Response: Cabinet notes the Select Committee's comments

III. The select committee welcomes the completion of Equality Impact Assessments for proposed budget efficiencies. The Committee notes that they are in different stages of completion and that further work is required to fully complete them to a high and consistent standard (using the agreed template and process). The select committee recommends that this continues to be assessed as part of its work overseeing Equalities & Diversity.

Cabinet Response: Cabinet notes the Select Committee's comments

IV. The select committee welcomes the reduced capital financing costs in the revenue budget, but voices concern about the deliverability of the scale of the remaining capital programme, and risks that this may therefore pose to key priority areas of investment.

Cabinet Response:

Cabinet notes the Select Committee's comments. Delivery of the capital programme will continue to be overseen by the Capital Programme Panel and Strategic Capital Groups. Capital expenditure against budget will be reported to Cabinet on a monthly basis as part of the ongoing monitoring of the Council's financial position.

V. The select committee endorses the council's attitude to risk and the budget's risk profile and recommends that work continues to revise overall risk downward across the medium term (recognising the work of the Audit and Governance Committee to monitor risk). The Committee notes the significant risk associated with transformation programmes and has continued concerns about siloed working and effective governance and oversight across the programmes at the heart of the Council's efficiencies savings (noting the experience with MySurrey) and urges the S151 officer to prioritise focus in this area.

Cabinet Response:

Cabinet notes the views of the Select Committee. The Transformation programme has been refocused, there is a new streamlined governance approach to monitoring and oversight, there is a move to a "One Council" approach to transformation work and a clear approach to ensuring delivery.

VI. Accountability for delivery of efficiencies: The Committee supports the additional focus on good governance and increased oversight of the delivery of savings through implementation of efficiency delivery plans and robust monitoring to hold directorates to account; and looks forward to reviewing the success of this approach.

Cabinet Response: Cabinet notes the Select Committee's comments

VII. The Committee notes concern about the Maintenance backlog and requests to review past and current maintenance reports in more detail. *(Possibly via a Task & Finish Exercise)*

Cabinet Response:

Cabinet notes the Select Committee's comments and agrees to a review. The Resources & Performance Scrutiny Officer is liaising with Land & Property to agree the best way to carry this out.

SURREY COUNTY COUNCIL

CABINET

DATE: **28 JANUARY 2025**

REPORT OF: **COUNTY COUNCIL**

SUBJECT: **REFERRAL OF COUNTY COUNCIL MOTION (MOTION 11 iii) (10 DECEMBER 2024)**

SUMMARY OF ISSUE:

At the County Council meeting on 10 December 2024, Councillor Liz Townsend moved a motion under Standing Order 11.

Under Standing Order 12.3, Councillor Clare Curran, the Cabinet Member for Children, Families and Lifelong Learning moved a proposal that the motion be referred to the Cabinet for more detailed consideration.

The proposal to refer the motion was put to the vote and received support.

RESOLVED:

That the motion be referred to the Cabinet for consideration.

MOTION DETAIL:

This Council recognises that:

Children and young people have a legal right to special educational provision and support that meets their needs. However, currently too many children and young people are not getting the education and support they need, with long-term consequences for their educational outcomes and overall wellbeing, together with that of their families.

Many parents and carers of children and young people with additional needs often find the system to access education an arduous and expensive battle that brings families to breaking point.

Part of the process that they report causes much distress is the panel decision making process. This is the point when decisions are made about their child behind closed doors often by unknown professionals, and to which the individual case officer, who is involved with the families on a day-to-day basis, is not automatically invited.

This Council acknowledges that:

Many parents do not currently feel that the panel process is transparent or consistent. These panels are making significant decisions about the future of children and young people with additional needs, and it is important parents are part of the process.

Due to its closed nature, many parents and carers often feel that vital information is not adequately covered and, in some cases, omitted. Once a decision is made, the rationale provided to parents and carers for this is often reported as inadequate and this compounds a feeling of exclusion and mistrust.

This Council notes:

This process is not a statutory requirement and could be changed in line with The SEND code of Practice SEND_Code_of_Practice_January_2015.pdf (publishing.service.gov.uk) that sets out the requirements to involve families and young people in decision making.

This Council resolves to call on the Cabinet Member for Children, Families and Lifelong Learning to commit to:

I.   Provide the opportunity for parent/carers of children with additional needs to be involved in the panel decision process with a clearly defined role.
II.   Provide the opportunity for the child or young person with additional needs to be involved in the panel decision process with a clearly defined role.
III. Ensure the relevant case officer is automatically invited to attend panel decision meetings.

NEXT STEPS:

In line with Standing Order 12.5, Councillor Liz Townsend will be invited to present her motion at the 28 January 2025 Cabinet meeting with the motion seconder, Councillor Paul Follows also being invited to speak.

In line with Standing Order 12.6, Cabinet will report upon the motion to the next ordinary meeting of the Council.

Contact Officers:

Vicky Hibbert, Assistant Director – Governance and Democratic Services, vicky.hibbert@surreycc.gov.uk

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

SURREY COUNTY COUNCIL

CABINET

DATE: **28 JANUARY 2025**

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

This page is intentionally left blank

Cabinet Member Decisions

Cabinet Member for Property, Waste, and Infrastructure Decisions – 17 December 2024

6

Decision:

DISPOSAL OF LAND AT SPITAL HEATH, DEEPDENE AVENUE, DORKING

(i)   Resolved

The Cabinet Member for Property, Waste and Infrastructure:

1. Approved the disposal, in conjunction with the Surrey Police and Crime Commissioner on the terms and conditions, and to the party, outlined in the part 2 report.

2. 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.

(ii)   Reasons for decision

The Cabinet has endorsed rationalisation of the surplus estate, and the Cabinet Member has previously formally declared lands at Spital Heath, Deepdene Avenue, Dorking surplus to operational requirements. The transaction offers an opportunity to secure a capital receipt on an asset that is otherwise landlocked by land owned by the Police.

Completion of the transaction will be conditional upon the outcome of planning proposed by the purchaser as outlined in the part 2 Report.

This page is intentionally left blank

CABINET MEMBER OF THE MONTH: Sinead Mooney, Adult Social Care

Right Home/Right Support

The Right Homes, Right Support Strategy rounded off 2024 on a positive footing and 2025 will see the delivery of major projects securing improved outcomes for the people we support and their families and carers. Firstly, we are in the final stages of construction for our new Short Breaks accommodation in Woking, Emily Lodge and we anticipate this new service will be operational from Spring 2025. We will also commence construction for a further new Short Breaks service in Banstead this year. Construction remains on track to deliver new Supported Independent Living at three Council owned sites across Surrey in Horley, Woking and Cobham. The first of these sites will start welcoming new tenants with care and support needs from Autumn of this year.

For affordable Extra Care Housing, we finalised the legal arrangements for the delivery of our first development in Guildford at the end of 2024. We anticipate that our delivery and housing management partner Place for People will commence construction in Spring 2025. Furthermore, we secured outline planning for affordable Extra Care Housing at seven sites across Surrey (Epsom and Ewell, Reigate and Banstead, Runnymede, Surrey Heath, and Tandridge).

Finally, we are undertaking the commissioning and procurement activity to identify the care and support providers for our future accommodation (Supported Independent Living and Extra Care Housing). This will provide future residents with care and support to live active and fulfilling lives as independently as possible and ensure 'no one is left behind'.

Emily Lodge – Short Breaks Accommodation

Woking – Supported Independent Living

Horley – Supported Independent Living

Cobham – Supported Independent Living

Planning for Your Future Day

We are preparing for our first Planning for your Future Day on Tuesday 11 March 2025. This will provide another focal point as part of our ongoing campaign aimed at self-funders (people who arrange and pay for their own care as they are not eligible for county council support), carers and care arrangers. It aims to raise awareness about planning early for care, understanding all the options available, the costs of care and the importance of having conversations with loved ones or people they trust so that their preferences or wishes are considered, and they can make more informed decisions about their care.

In partnership with Age UK Surrey, we have held information sessions across Surrey with 1,533 local residents attending. The feedback has been consistently excellent with 98% finding the events helpful, 89% feeling more confident to start a conversation with someone they trust, 90% would recommend to a friend, 88% learned something new and 72% were prompted to start making plans.

Three local authorities will work with us to raise greater awareness and amplify key messages to residents and stakeholders.

Plans on the day and during the week of 10 March include:
- A resident in-person event in Guildford Baptist Church
- An online evening event open to residents from other counties
- A webinar for council staff/members
- A home care provider webinar on the campaign and seeking support to direct people to our information and resources on the AUKS website

- A large business webinar for retiring workforce and encouraging more businesses to sign up for sessions
- Our communications approach will include media work which will highlight the latest insight on resident planning and promote actions that people can take
- Launch a care calculator/ready reckoner for people to work out how long money will last.

Transformation Programme

The recent focus of our transformation has been on reviewing everything we do across the Directorate, making it more streamlined, effective, and efficient. This reflects both the financial challenges and the opportunities to improve the lives of our residents. We have increased our focus on managing demand into adult social care, improving our practice and processes. In addition to continuing to shape and develop a sustainable, responsive, and innovative care market. Helping us keep people independent and well, while being able to provide high quality care to people with complex social care needs. We have been testing innovative solutions to reduce the administrative burden on social workers to allow them more quality time to undertake assessments and see people sooner. Through the Accelerating Reform Funding (ARF) we bolstered our offer of support to unpaid carers (over 400 more unpaid carers supported since October 2024). Through the ARF we have also supported 11 local initiatives which help to reduce social isolation, connect people to local support and information, and improve support for carers. We are also making good progress on our in-year efficiency plans in a concerted effort to move towards a balanced budget position.

Carers Fair

Carers Rights Day, held on 21 November was a heartwarming celebration dedicated to the incredible unpaid carers of Surrey. Action for Carers Surrey hosted lively Carer Information Fairs, where a variety of local charities and organisations came together to offer practical, financial, and legal advice, along with general support and information. The atmosphere was buzzing with positivity as Councillor Sinead Mooney joined the festivities, expressing her admiration for unpaid carers and enjoying the chance to meet both staff and hearing about the lived experiences of local carers. The week was made even more special by the announcement of the recent CQC assessment results of Surrey adult social care, giving everyone even more reason to celebrate. Attendees were treated to free resources, delightful giveaways, and delicious coffee, tea, and cake, making the events not only informative but also a joyful break from their challenging daily routines. Pictured with Sinead in the photo are - Carers Practice Advisers Tracey Hampstead and Mel Randall plus Diana Saunders and Holly-Ann Hampstead from Spelthorne locality team.

Technology Enabled Care and Homes

Our Technology Enabled Care and Homes (TECH) paper is on the agenda for today's meeting. The paper marks a significant transition from piloting technology towards embedding technology in all that we do. Following a comprehensive review of our current pilots and working with other local authorities we are proposing an approach that ensures we remain outcomes focused and not technology driven. More staff engagement events and provider sessions will be scheduled across 2025 as we seek to develop a clear strategic ambition for technology and support our staff to 'think TECH' when delivering the best outcomes for our residents.

Housing

With a rapidly changing policy position from Central Government and its ambitious approach to housing delivery, SCC officers have been working with colleagues across borough and district authorities to understand the implications for Surrey. The latest changes to the National Planning Policy Framework method of assessing housing need mean that the housing need in Surrey has increased from 6,346 homes per year, under the old formula to 10,981 homes per year. SCC has raised concerns about the proposed scale of housing delivery within the county, and the implications on infrastructure provision and the Green Belt.

Opportunities are also being sought to use this changing policy context to our advantage in terms of supporting the delivery of affordable housing for Surrey residents. At the end of 2024, Surrey's first Affordable Housing Roundtable was organised and attended by registered social housing providers, housing developers and senior local government officers to explore the current barriers to affordable housing delivery in Surrey. A second event will be taking place in February to start exploring solutions and an updated "Call to Government", with over 40 businesses and organisations already signed up to be involved in the work and part of designing the solutions.

Stronger connections are also being made between planning, housing provision and health & wellbeing outcomes, with membership of the Health and Wellbeing Board being extended to include a registered social landlord.

SURREY COUNTY COUNCIL

CABINET

DATE:	**28 JANUARY 2025**
REPORT OF CABINET MEMBER:	**TIM OLIVER, LEADER OF THE COUNCIL**
LEAD OFFICER:	**ANDY BROWN, DEPUTY CHIEF EXECUTIVE & EXECUTIVE DIRECTOR RESOURCES (S151 OFFICER)**
SUBJECT:	**2025/26 FINAL 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 Full Council on 4th February 2025. Cabinet is required to recommend a budget to Council for consideration at this meeting.

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.

A strong focus on financial accountability has enabled the Council to improve its financial resilience and provides a stable financial foundation enabling the Council to be ambitious and to continue to drive improvements in our services. Despite this, 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 in order to ensure our financial resilience.

The Provisional Local Government Finance Settlement (LGFS) was released on the 18 December 2024, with a final settlement due in February 2025. Whilst there was additional investment announced for local authorities, specifically in relation to social care funding, 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, resulting in the need for further efficiencies within services and an increase in Council Tax to ensure the budget can be balanced.

The Budget announcements on the 30 October included a rise in both the National Living Wage and in Employer's National Insurance Contributions. This will increase the Council's own wage bill, as well as that of many of our suppliers, which will potentially feed through into increased costs. The direct impact on the Council's wage bill is factored into the budget proposals, along with an estimate of the compensation grant the Council will receive for the impact of National Insurance Contribution increases. There is currently an estimated shortfall in this funding of c£2m, increasing the pressures in the budget. The compensation funding was not confirmed in the Provisional LGFS and will not be confirmed until the Final Settlement in February 2025, increasing the budget planning risks.

The Provisional LGFS shows the Council's Core Spending Power, as calculated by the Government, to be a 4.9% increase (in cash terms). Of this 4.9% increase in Surrey's core spending power, the majority (over 90%) relates to an assumption of full utilisation of the council tax and adult social care precept levels, rather than additional funding from Government. The net outcome of the provisional LGFS indicates a net change to government grants for Surrey County Council of £2.9m compared to 2024/25, which does not go far enough in addressing the financial challenge local authorities continue to face.

The settlement was also a window into the future fair funding review to be undertaken by the Government. In the settlement, £600m of the newly identified £1.3bn for local government was distributed to areas with higher deprivation and with smaller level of council tax base. Surrey Councils, including the County, did not receive any of this funding under this distribution methodology.

It is vital that we continue to ensure that the County Council is in a resilient financial position, so that there is no risk of failing to deliver crucial services, either in the short or medium term. Significant efficiencies of £66.4m have been identified in the budget proposals to reduce the forecast pressure on the budget.

The final budget for 2025/26 proposes total funding of £1,264.1m; an increase of £55.7m from 2024/25. In order to achieve a balanced budget, it includes the following recommendations to full Council on Council Tax and the Adult Social Care Precept:

- 2.99% increase in Council Tax
- 2% Adult Social Care Precept

The increase in the total bill for a Band D property will equate to £1.69 per week. 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 with cost of living pressures.

Over recent years the Council's capital ambition and delivery has grown significantly. However, the economic environment has changed over recent years and high interest rates and significant increases in prices are making delivery of capital schemes more expensive. In order to sustain our financial resilience, a thorough review of the capital programme has been undertaken to ensure the affordability and sustainability of our capital programme in the medium term.

The Capital Programme for 2025/26 – 2029/30 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.

The Council needs to focus attention on the medium-term. It is anticipated that this period of financial challenge for the Council will persist, and without further action the budget gap is expected to continue to grow.   Prospects for local government finance settlements in the next spending review period look very tight, with real-terms cuts anticipated for unprotected services, including most of local government.

The Government has confirmed its commitment to reviewing Local Government funding distribution (also referred to as the Review of Relative Needs and Resources or the Fair Funding Review). On the basis that the Government has committed to multi-year settlements and launched a spending review to conclude in 2025, Funding Reform has been modelled to take effect from 2026/27. Confirmation over the timing of the reform is crucial to planning, not least because of the anticipated reduction in overall funding. Currently, transitional arrangements are assumed to phase and mitigate the impact of the reduction expected from the funding reform. Fair Funding Reform almost certainly will have a very significant impact on the Council's future funding position as it is likely to include an expectation that the council maximises its reliance on Council Tax for funding services.

Transformation and service delivery plans are being developed now to identify opportunities to improve the medium-term financial outlook, developing a 'One-Council' approach to transformation with several cross-council programmes designed to optimise the way we work.

Cabinet is required to consider and make recommendations to Council on:

- The Revenue and Capital Budgets for 2025/26, including efficiency proposals.
- The Council Tax Precept level for 2025/26.
- The Council's Capital Programme for 2025/26 - 2029/30.
- The Council's Capital, Investment and Treasury Management Strategy, which provide an overview of how capital expenditure, capital financing and treasury management activity contribute to the delivery of our services and sustain our capital investments.

Recommendations:

It is recommended that:

Cabinet recommends that Council:

1. Approves the net revenue budget requirement be set at **£1,264.1 million** (net cost of services after service specific government grants) for 2025/26 (Annex B), subject to confirmation of the Final Local Government Financial Settlement.

2. Approves the total Council Tax Funding Requirement be set at **£972.3 million** for 2025/26. This is based on a council tax increase of 4.99%, made up of an

increase in the level of core council tax of 2.99% and an increase of 2% in the precept proposed by Central Government to cover the growing cost of Adult Social Care (Annex E).

3. Notes that for the purpose of section 52ZB of the Local Government Finance Act 1992, the Council formally determines that the increase in core council tax is not such as to trigger a referendum (i.e. not greater than 3%).

4. Sets the Surrey County Council precept for Band D Council Tax at £1,846.35, which represents a 4.99% uplift, a rise of £1.69 a week from the 2024/25 precept of £1,758.60. This includes £286.61 for the Adult Social Care precept, which has increased by £35.17. A full list of bands is as follows:

Valuation band	Core precept	ASC precept	Overall precept
A	£1,039.83	£191.07	£1,230.90
B	£1,213.13	£222.92	£1,436.05
C	£1,386.44	£254.76	£1,641.20
D	£1,559.74	£286.61	£1,846.35
E	£1,906.35	£350.30	£2,256.65
F	£2,252.96	£413.99	£2,666.95
G	£2,599.57	£477.68	£3,077.25
H	£3,119.48	£573.22	£3,692.70

5. Notes that underlying General Fund reserve balances are projected to increase to £50.5 million as of 1 April 2025, based on the current year forecast.

6. Approves the Total Schools Budget of £738.7 million to meet the Council's statutory requirement on schools funding (as set out in Section 9 of the 2025/26 Final Budget and Medium-Term Financial Strategy to 2029/30).

7. Approves the overall indicative Budget Envelopes for Directorates and individual services for the 2025/26 budget (Annex B) and that the Corporate Leadership Team be required to meet the revenue budget for the delivery of Council services.

8. That the Corporate Leadership Team be required to deliver the revenue saving plans as set out in Annex A.

9. Delegate powers to the Leader and Deputy Chief Executive & Director of Resources (Section 151 Officer) to finalise budget proposals and recommendations to County Council, updated to take into account new information in the Final Local Government Finance Settlement;'

10. Approves the total £1,398.8 million proposed five-year Capital Programme (comprising £1,016.8 million of budget and £382.0 million pipeline), including the £406.3 million annual Capital Budget for 2025/26 (Annex C).

11. Approves the Capital and Investment Strategy (Annex F - Sections 1 to 3), which provides an overview of how risks associated with capital expenditure, financing and treasury will be managed as well as how they contribute towards the delivery of services.

12. Approve the Treasury Management Strategy and Prudential Indicators (Annex F – Section 4) which set a framework for the Council's treasury function to

manage risks, source borrowing and invest surplus cash, as considered by the Audit & Governance Committee on 22 January 2025.

13. Approves the policy for making a prudent level of revenue provision for the repayment of debt - the Minimum Revenue Provision (MRP) Policy (Annex G).

14. Approves and reviews the re-set of the Earmarked Reserves, as set out in Annex D.

15. Notes that the investment in Transformation required to deliver improved outcomes and financial benefits is built into the proposed Medium-Term Financial Strategy (as set out in section 3 of 2025/26 Final Budget Report and Medium-Term Financial Strategy to 2029/30).

Reason for Recommendations:

Council will meet on 4 February 2025 to agree a budget and to set the Council Tax Precept for 2025/26. Cabinet is required to recommend a budget to Council for consideration at this meeting. The budget directs available resources to support the achievement of the Council's ambitions and priorities in the 2030 Vision and the Refreshed Organisation Strategy.

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

Executive Summary:

1. The Final Budget 2025/26 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. The consultation and engagement process to inform the budget was divided into two phases:
   - The first phase took place in the summer of 2024. The objectives of this phase were to gather insight on what the most important priority outcomes were for stakeholders, how the budget should be allocated, approaches to balancing the budget, and conditions for supporting a council tax increase.

   - The second phase was a consultation on the Council's Draft Budget, after it was considered by Cabinet on 26 November 2024. The purpose of this exercise was to provide residents and other stakeholders with information on the key proposals included, and to seek their views on the financial efficiencies that the Council is pursuing.

3. Section 10 of the 2025/26 Final Budget Report and Medium-Term Financial Strategy to 2029/30 and Annex H attached to the report set out the results of the consultation and engagement activity undertaken throughout 2024 as part of developing the budget, ensuring residents and stakeholders were able to inform the final budget.

4. Members have also been engaged extensively through the budget development process. Activity included informal and formal briefings of Select Committees, all Member briefings and briefings offered to each of the political groups. Early Select Committee recommendations were sought in advance of the Draft Budget and were considered and responded to by Cabinet at its meeting on 26 November 2024. Further recommendations on the Draft Budget proposals have been sought and considered from each Select Committee and responses will be presented by Cabinet on 28 January 2025.

Risk Management and Implications:

5. 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:

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

Section 151 Officer Commentary:

7. The Council has a legal requirement to set a balanced budget. We are not permitted to allow spend to exceed available resources which would result in an overall deficit. Sections 32 and 43 of the Local Government Finance Act 1992 also require authorities to have regard to the level of reserves to meet estimated future spend when calculating the budget requirement.

8. The budget report has been drafted on the basis of this legislation, and critically the 2025/26 budget is balanced. Furthermore, it has no reliance on the use of one-off funding i.e. reserves, to fund on-going activity and has a full scheduled savings plan proposed for 2025/26 to achieve this position.

9. The enclosed report sets out a balanced budget for 2025/26. Given the level of risk and uncertainty inherent in both the local authority environment and the national economic and political environment, coupled with ongoing uncertainty over future funding levels, retention of the Council's reserves will be essential, in order to provide financial resilience and ongoing financial sustainability.

10. Under section 25 of the Local Government Act 2003 there is a statutory duty on the Section 151 Officer to report, at the time the budget is considered and the Council Tax set, an opinion on:
    - the robustness of the estimates made for the purposes of the [budget] calculations; and
    - the adequacy of the proposed financial reserves.

11. The budget has gone through extensive iterations, with collaboration and challenge between Cabinet and the Corporate Leadership Team in the

development of inflation and demand pressures as well as proposals for efficiencies. These have then been scrutinised through wide engagement with Select Committees.

12. The Council overall continues to be in a healthy financial position, especially considering the current financial challenges and outlook for the local government sector. Although there is a projected overspend in 2024/25 of £18.6m (at the month 8 position), this will be offset by the £20m budget held centrally, resulting in a contribution to reserves, provided this position is maintained by the outturn.

13. Equally this budget looks to further strengthen the financial sustainability of the authority by underpinning the £20m budget as a planned contribution to reserves to bolster financial resilience as well as the potential to fund future investment, be that on transformation, prevention or priorities.

14. This will be done with an emphasis on the delivery of the planned savings in year, and the realisation and identification that further investment will be needed to transform services to deliver efficiencies and continue to ensure a balanced budget in future years. The detail on the transformation activity and its associated funding is presented in more depth in the report and goes towards ensuring transparency around our reserves and the activity they fund.

15. The level of savings delivery, at £66.4m, is a key risk. This will be a focus within the leadership group in 2025/26, based on savings delivery plans, and will ensure oversight and delivery of the agreed plans. Critically, where this is not possible or there are variances to plan, there will be proactive early mitigation to ensure overall budgetary control, to complement the already tight financial management of budgets across the Council.

16. Although pressures of over £122m have been built into the budget, there are still risks present within these. The demand for social care in particular is ever present with the growing and ageing demographic but also the complexity of care for our vulnerable adults and children. When matched with the sufficiency of places to meet this need, it drives market forces and the cost of placements/packages.

17. The assumptions around these pressures on demand and inflation have been built into the base budget and will continue to be reviewed to ensure assumptions remain robust and financial impacts can be reported and where necessary management action taken.

18. In terms of inflation an assumption of 3% has been used for pay and 2% for non pay related costs, however where specific evidence exits e.g. contract specific inflation, these have been taken into account. The pay award for 2025/26 will mirror the national pay award. Whilst CPI remains above the Bank of England target of 2% this represents potential future pressure and risk above those assumptions.

19. A specific risk within the budget is the impact of the employers' national insurance increases from April 2025. Whilst we have prudently assumed £6.4m in funding will be received from Government, this is still £2m short of the estimated direct cost of £8.4m. At the time of writing, it is not known what the final funding position will be from Government.

20. In addition, there will be pressure on the Council's supply chain to absorb the increase in employers' national insurance within their current cost and fees. This is the position that is being adopted heading into 2025/26.

21. It is forecast for interest rates to lower during 2025/26, however the current economic conditions and the Council's debt portfolio, whereby we are holding short term debt until rates lower, has seen higher than forecast borrowing costs. Ultimately the Council will want to secure longer term debt to match the investment made in assets and infrastructure, but current prevailing interest rates result in the holding of short term debt as the most prudent course despite the higher than expected short term rates.

22. The local government provisional settlement only provides certainty for 2025/26, but it was a stark indicator of what is likely to come in the way of any fair funding review. The funding guarantee, worth £9.1m to the council in 2024/25, was removed and no additional funding was received out of the £600m recovery grant allocation, with the distribution methodology aligning this to areas with higher deprivation and lower ability to raise funds from council tax.

23. Although not a risk in 2025/26, as effectively the budget gap has been closed by the Cabinet's proposal to raise council tax (as is expected by HM Treasury), a review of local government funding does present a significant risk. Moving forward we have assumed a reduction in government funding as a result of any fair funding review but with transition funding lowering the immediate impact. Overall it is estimated in the MTFS that government funding will reduce by over £80m.

24. As part of the budget setting process, the levels of balances and reserves has been reviewed and determined ensuring that the level is justifiable in the context of local circumstances and risk profile. The Section 151 officer has reviewed the level in order to ensure a prudent level of balances that is commensurate with the risks that the Council faces and the context within which the authority operates.

25. Section 5.27 of the 2025/26 Final Budget and Medium-Term Financial Strategy to 2029/30 sets out Reserves and Risk Mitigation Strategy, including the level of key reserves and contingencies, **totalling £121.4m** (or 10% of the 2025/26 net revenue budget):
    - General Fund (£50.5m).
    - Earmarked Reserves available to support unforeseen events and provide financial resilience (£70.9m)

It should be noted that based on the assumption of the £20m contribution to reserve that the overall level and % of reserves held against risk rises to £98.9m and 12% by the end of the financial year. Should there be service spending pressures during 2025/26 which are not mitigated fully, then the contribution to reserves will be adjusted accordingly.

26. The following principles for the overall management of reserves are proposed:

- Reserves should only be used to fund one-off or time-limited investment that will drive out efficiencies, deliver the capital programme or improve the delivery of services and Council priorities;

- Reserves cannot be used as a substitute for permanent efficiencies to meet permanent spending pressures;

- Reserve contributions should be reviewed annually to ensure contributions are equal to planned use over the medium-term;

- Over the medium-term, reserves should stay flat or ideally increase – as financial uncertainty, the efficiency requirement and the investment ambition will remain high across the MTFS period. As such, the budget proposes a planned contribution to reserves of £20m to enable further funding of one-off and transformational activity and/or continue to improve overall financial resilience;

- Reserves should ideally not drop below 10% of the net budget. It is proposed to implement a 2% buffer over the 10% threshold that establishes the following three levels:

  o **Minimum** – reserves do not drop below 10% and, if they do, are rebuilt as soon as possible in the following years' budget

  o **Basic** – reserves do not drop below 12% (10% + 2% buffer) and, if they do, are rebuilt to at least 12% over medium-term

  o **Enhanced** – reserves stay flat or grow, dependent on analysis of the risk environment.

- To avoid a programmed reduction in reserves, the use of reserves to support Transformation or other investment should be less in any given year than the planned budgeted contribution to reserves.

27. Significant amount of funding has been set aside to deal with anticipated or potential risks/financial shocks to the system and it is critical that the Council maintains these reserves as set out in the strategy and principles above.

28. A significant amount of one-off funding has also been set aside for investment, as detailed out within transformation, future liabilities and contractual commitments. One of the most significant risks, to which the Council holds a counter reserve balance, is around the High Needs Block of the DSG. Although the Council is in a safety valve agreement, the high needs deficit continues to rise and is forecast to stand at around £167.5m at the end of 2025/26. Despite significant recovery work, the ambitious budget reductions in the initial safety valve programme are under growing pressure as costs and demand have grown faster than envisaged. The Council is in discussions with the DfE about an extension to the Safety Valve agreement.

8

29. Unlike the majority of other councils in safety valve arrangements, the Council holds a significant offsetting reserve balance of £144m to provide resilience. This, taken with other reserve balances, will ensure that should the statutory override not be continued beyond March 2026 then the Council, from an accounting perspective, has sufficient reserves to offset the deficit.

30. Whilst at the time of writing the potential for Local Government Reorganisation and Devolution, following the white paper in December, is a live issue, this should not distract from the Council in delivering a balanced budget in 2025/26. The Corporate Leadership Team will ensure that focus is on maintaining service delivery and the delivery of the saving plans. There is sufficient resource put aside to react to whatever decision is made by the Government ahead of and during 2025/26.

31. It is the opinion of the Section 151 Officer that the budget proposals set out in the report for setting the 2025/26 budget have been developed through a process of review and challenge and that the level of reserves is sufficient. The financial standing of the Council is sound and continues to improve in the context of those key risks and that the proposed budget is robust and achievable.

Legal Implications – Monitoring Officer:

32. The Assistant Chief Executive and Executive Director of Resources is the officer designated by the Council as having the statutory responsibility set out in Chief Finance Officer (CFO) under section 151 of the Local Government Act 1972. The CFO is responsible for the proper administration of the Council's financial affairs.

33. In order to fulfil these statutory duties and legislative requirements the CFO will:
   - Set appropriate financial management standards for the Council which comply with the Council's policies and proper accounting practices and monitor compliance with them.
   - Determine the accounting records to be kept by the Council.
   - Ensure there is an appropriate framework of budgetary management and control.
   - Monitor performance against the Council's budget and advise upon the corporate financial position.

34. The setting of the budget is a function reserved to the Full Council, but the Cabinet is required to make recommendations it wishes to make to Full Council on the various calculations the authority is required to make. Once the budget is agreed by Full Council, the Cabinet cannot make any decisions which conflict with that budget, although virements and in year changes may be made in accordance with the Council's Financial Regulations. Similarly, any decision made by the Cabinet must be made in accordance with the policies, plans and strategies agreed by Council.

35. In each financial year the Council must make its budget calculation in accordance with sections 42A and 42B of the Local Government Finance Act 1992 (LGFA). In particular, it must calculate the total of:

- The expenditure the authority estimates it will incur in the year in performing its functions and will charge to a revenue account for the year
- Such allowance as the authority estimates will be appropriate for contingencies in relation to expenditure to be charged to a revenue account for the year 2025/26
- The financial reserves which the authority estimates it will be appropriate to raise in the year for meeting its estimated future expenditure
- Such financial reserves as are sufficient to meet any estimated revenue deficit for previous financial years which has not already been provided for.

Those calculations are then used to determine the council tax requirement for the year.

36. The Council must issue any precept or precepts in accordance with section 40 of the LGFA. The section prescribes what must be included in the issue of the precept. It must be issued before 1 March in the financial year preceding the year for which it is issued but is not invalid merely because it is issued on or after that date.

37. Under the LGFA section 52ZB the council is required when setting council tax, to determine whether or not the increase is 'excessive'. The draft principles for 2025/6 published by the Secretary of State in December 2024 state that for the Council any increase of 3% or more (excluding the 'social care precept') would be defined by the Secretary of State as 'excessive'. In addition, social care authorities are permitted to levy a 'social care precept' of 2% or less. The recommendations in this report would not lead to an increase in council tax which is defined as 'excessive' or trigger the referendum principles where any increase by the Council of 5% or more.

38. Under section 25 of the Local Government Act 2003, the CFO is required to report to the authority on the robustness of the estimates made for the purposes of the calculations required to be made by the Council. These are the estimates which the Cabinet is required to determine and submit to Full Council and are contained within this report. The CFO is also required to report on the level of reserves.

39. In deciding its Capital Programme for the year, the Council must have regard to the 'Prudential Code' established by the Local Government Act 2003. This is addressed in the report.

40. The budget allocates funding to services on the basis that a number of changes to Council services which are under consideration may be made. The budget does not itself authorise any changes to services and does not assume that changes will be made. Any changes to services will need to be the subject of appropriate consideration by the Cabinet Member or the Cabinet following, where

appropriate, consultation and a full report setting out options for change, the impact of the proposed changes on service users, including in particular the impact on different equality groups. Where a decision is made not to implement any changes then budgetary adjustments may need to be made but the Council is confident that whilst savings over the budget are assumed, each can be implemented in a number of ways, thus no particular changes are assumed.

41. Section 106 of the LGFA restricts any member of the Council from voting on the budget or council tax requirement if they owe any amount of council tax to any local authority which has been outstanding for more than two months. If this applies to a member and they attend a meeting at which the council tax requirement is to be set, they must declare this fact and they cannot vote. It is an offence to vote or to fail to make this declaration.

Equalities and Diversity:

42. Section 11 of the 2025/26 Final Budget Report and Medium-Term Financial Strategy to 2029/30 sets out the equality implications of the efficiencies proposed for the 2025/26 financial year. This analysis supports Cabinet to give due regard to the Public Sector Equality Duty under section 149 of the Equality Act 2010.

43. Where available at this stage, Equality Impact Assessments have been made available on the council's website for Members to review plans further in their development. Some proposals are at a formative stage, and EIAs will be available at the point final decisions need to be taken on them.

44. Overall, it is anticipated there will be a mixture of positive and negative impacts, particularly for:
    - Older adults and their carers, adults of all ages who are disabled, are experiencing mental health difficulties or have learning disabilities and their carers.
    - Children and young people, including those with special educational needs and disabilities (SEND), and their families.
    - Surrey County Council Officers, particularly women, working in support services and those from lower-income or socio-economically disadvantaged households.

45. Mitigating actions to minimise any negative impacts are summarised in Section 11. Details on mitigations for specific efficiency proposals are set out in the EIAs on the council's website.

What Happens Next:

46. Cabinet is requested to consider and agree the recommendations 1- 14 as set out above and recommend to Council on 4 February 2025 for approval.

47. Pending agreement, the Final Budget and Medium Term Financial Strategy will be communicated to residents, staff, partners and other key stakeholders.

Report Author: Andy Brown, Deputy Chief Executive and Executive Director of Resources (Section 151 Officer), andy.brown@surreycc.gov.uk

Consulted:

Cabinet, Executive Directors, Heads of Service

Select Committee Scrutiny of the Draft Proposals in December.

Informal briefings to Select Committees in July & October 2024 & to opposition groups in July 2024.

All Member Briefings in May 2024, November 2024 and January 2025.

Annexes:

2025/26 Final Budget and Medium-Term Financial Strategy to 2029/30

Annex A – Pressures and Efficiencies 2025/26 – 2029/30

Annex B – Detailed Revenue Budget 2025/26

Annex C – Capital Budget 2025/26 - 2029/30

Annex D – Projected Earmarked Reserves and Balances

Annex E – Council Tax Requirement

Annex F – Capital, Investment and Treasury Management Strategy 2025/26

Annex G - Minimum Revenue Provision (MRP) Policy 2025/26

Annex H – Consultation Summary for 2025/26 Budget

Annex I – Equalities Impact Assessment for 2025/26 Budget

Annex J – Financial Management Code of Practice Assessment

Sources/background papers:

- Provisional Local Government Finance Settlement 18 December 2024
- Draft Budget 2025/26 and Medium Term Financial Strategy to 2029/30 (Cabinet 26th November 2024)

8

This page is intentionally left blank

THE
SURREY
WAY

SURREY
COUNTY COUNCIL

8
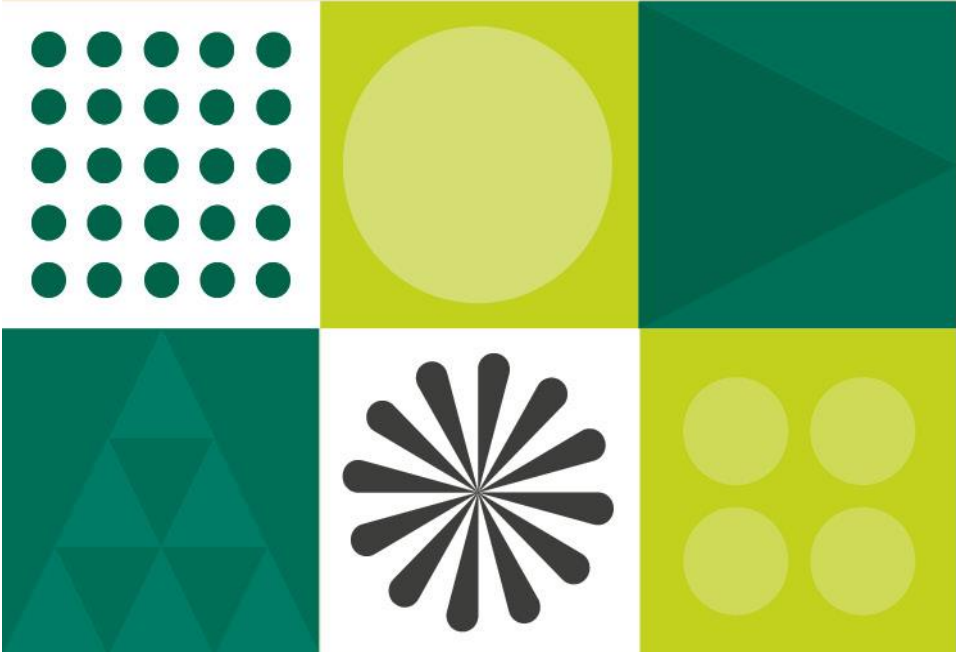
2025/26 Final
Budget &
Medium-Term
Financial
Strategy to
2029/30

1. EXECUTIVE SUMMARY

1.1 This Council continues 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 deliver high quality to residents.

Developing the Budget and Medium-Term Financial Strategy

1.6 The 2025/26 Budget Report and Medium-Term Financial Strategy to 2029/30 delivers a balanced budget for 2025/26 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 which, coupled with slow national economic growth, has had a damaging effect on the UK economy. Local Government funding remains highly uncertain and insufficient to combat increasing demand for vital services, 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 going forward, the Local Government Finance Settlement for 2025/26 remains a single year event, with multi-year settlements aligned to the multi-year Spending Review thereafter. This represents the sixth consecutive single year settlement.

1.12 The Provisional Local Government Funding Settlement (LGFS) was released on 18th December 2024, following on from the Government's Budget on 30 October 2024 and a policy statement issued by the Minister of State for Local Government and English Devolution on 28 November 2024. Both of these prior announcements provided some indications of what the settlement would include, including additional grant funding for local authorities, which the November Policy Statement indicated would be targeted at areas with higher deprivation and those less able to raise income through council tax increases. There were elements unconfirmed and a lack of detail on actual allocations to make funding estimates uncertain until the official announcement.

1.13 The LGFS shows the Council's Core Spending Power, as calculated by the Government, to be a 4.9% increase (in cash terms). Of this 4.9% increase, 90% relates to an assumption of full utilisation of the council tax and adult social care precept levels, rather than additional funding from Government. The net outcome of the provisional LGFS indicates a net change to government grant assumptions of £2.9m, this is discussed in further detail in Section 5 below. The final settlement is due in February 2025.

1.14 The Budget announcements on the 30 October included a rise in both the National Living Wage and in Employer's National Insurance Contributions. This will increase the Council's own wage bill, as well as that of many of our suppliers, which will feed through into increased costs. The direct impact on the Council's wage bill is factored into the budget proposals, along with an estimate of the compensation grant the Council will receive for the impact of National Insurance Contribution increases. This compensation funding was not confirmed in the Provisional LGFS and will not be confirmed until the Final Settlement in February 2025, increasing the budget planning risks.

1.15 The overall outlook for 2025/26 is a challenging one. Whilst there is an anticipated small increase in grant funding, 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, resulting in a need for further efficiencies within services and an increase Council Tax to ensure the budget can be balanced.

1.16 The final budget for 2025/26 proposes total funding of £1,264.1m; an increase of £55.7m from 2024/25. In order to achieve a balanced position, the budget includes the following recommendations to full Council on Council Tax and the Adult Social Care Precept;

- 2.99% increase in core Council Tax
- 2% increase in the Adult Social Care Precept

The increase in the total bill for a Band D property will equate to £1.69 per week. 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 finance, particularly during times of high cost of living.

1.17 The budget gap is expected to continue to grow over the medium term, based on current projections, to the order of £172m. The Council recognises that tackling this gap will require a medium-term focus and a fundamentally different approach.

Engagement

1.18 The Council has undertaken consultation and engagement with residents and other stakeholders, such as partner organisations and Members, to provide the Council with insights to inform budget setting for 2025/26 and into the Medium-Term.

1.19 The approach taken during 2024 was divided into two phases:
- The first phase took place in the summer of 2024. The objectives of this phase were to gather insight on what the most important priority outcomes were for stakeholders, their views on how the Council allocated its financial resources, approaches to balancing the budget and circumstances under which a council tax increase would be supported.
- The second phase was a consultation on the Council's draft budget. This phase sought to gauge support or opposition to the draft proposals for investment and closing the draft budget gap, at that time, of £17.4m for 2025/26. It was an opportunity for the Council to be transparent about its plans and source as much feedback from as many Surrey stakeholders as possible.

1.20 Over 2,200 stakeholders gave their views across both phases. The key insights are set out in Section 10.

1.21 Members were also engaged extensively through the budget development process. This included formal and informal briefings of Select Committees, all Member briefings and briefings offered for each of the political groups. Points raised by Members included:
- Assurance that the impacts of the proposed budget, such as equality and environmental impacts, have been identified and sufficient mitigations and monitoring is in place.
- Concerns about any service reductions on the quality of service provided.
- Questions on the affordability of the capital programme.
- Seeking confidence on how pressures on high demand services will be managed and mitigated.
More detail on the consultation and engagement activity that has informed this budget is included in Annex H.

Key Elements of this Report and Next Steps

1.22 The key elements of this report include:

- The Council's Strategic Framework (Section 2);
- An update on our Innovation, Transformation & Change approach (Section 3);
- Directorate Service Strategies, aligned to both of the above (Section 4);
- The Financial Strategy for 2025/26 (Section 5);
- The five-year Capital Programme, setting out the Council's ambitious plans to invest in Surrey's infrastructure, economy and create a greener future (Section 6);
- 2024/25 Financial Performance – revenue and capital (Section 7);
- The Medium-Term financial outlook to 2029/30 (Section 8);
- The Schools Budget (Section 9)
- Our approach to engagement and consultation (Section 10); and
- Budget Equality Impact Assessment (Section 11) summarising key messages from an equality analysis for the budget, including commentary on the impact of Council Tax increases.

1.23 The final 2025/26 Budget and Medium-Term Financial Strategy to 2029/30 will be presented to Council for approval on the 4 February 2025.

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 The transformation programme investment is set out below, with a planned investment of £38.7m over the next three years, £24.6m in 2025/26. The investment comes from the transformation base budget of £6.5m, plus the temporary allocation of £5m of budget from Central Income and Expenditure and the approved use of reserves for Adults Wellbeing & Health Partnerships Transformation, Customer Transformation, the Data Team and a £2.5m contribution to the Additional Needs & Disabilities Recovery Programme in 2025/26.

3.4 This investment delivers £108m of the identified efficiencies across the MTFS as set out below:

Table 1 – Transformation Programme Investment & Efficiencies

	Overall Investment				Efficiencies					
	25/26 £m	26/27 £m	27/28 £m	Total £m	25/26 £m	26/27 £m	27/28 £m	28/29 £m	29/30 £m	Total £m
Core Transformation Programme										
Customer Transformation	3.6	3.1	0.2	**6.9**	(0.1)	(0.4)	0.0	0.0	0.0	**(0.5)**
Organisation Redesign	1.3	1.1		**2.4**	(8.9)	(3.0)	(0.2)	(0.0)	(0.0)	**(12.1)**
Adults Wellbeing Health Partnerships	3.8	0.5		**4.3**	(18.5)	(16.1)	(18.2)	(17.3)	(12.6)	**(82.7)**
Additional Needs and Disabilities Safety Valve	2.5	2.5	2.5	**7.5**						**0.0**
Data and Digital Transformation	2.7	2.1	1.1	**5.9**						**0.0**
High Performing Council Transformation	0.5			**0.5**						**0.0**
	14.4	**9.3**	**3.8**	**27.5**	**(27.5)**	**(19.5)**	**(18.4)**	**(17.4)**	**(12.6)**	**(95.3)**
Service Improvement Programme										
Additional Needs and Disabilities Recovery Plan	5.0			**5.0**						**0.0**
Children's Social Care	1.3			**1.3**	(3.6)	(6.9)	(1.5)	(0.7)	(0.1)	**(12.8)**
Design and Internal Consultancy	1.0			**1.0**						**0.0**
Data Team	1.0			**1.0**						**0.0**
Other smaller service improvement areas	1.9	0.5	0.5	**2.9**						**0.0**
	10.2	**0.5**	**0.5**	**11.2**	**(3.6)**	**(6.9)**	**(1.5)**	**(0.7)**	**(0.1)**	**(12.8)**
Total Transformation	**24.6**	**9.8**	**4.3**	**38.7**	**(31.1)**	**(26.4)**	**(19.9)**	**(18.1)**	**(12.7)**	**(108.1)**

3.5 In addition to the identified efficiencies, the transformation programme drives cost containment, most notably within the Additional Needs and Disabilities Programme, which drives the cost containment included in the Council's Safety Valve agreement:

	2023/24	2024/25	2025/26	2026/27	2027/28	**Total**
Safety Valve Cost Containment	£19m	£25m	£25m	£25m	£20m	**£114m**

3.6 Programmes such as Data and Digital and Customer enable efficiencies listed above against other programmes, such as organisational re-design. This demonstrates that our initiatives cannot be considered as individual, isolated programmes, but instead they are viewed as a portfolio of change programme that are connected and dependent on one another to enable us to successfully meet our strategic goals. Work is anticipated to generate further efficiencies, and therefore investment needs, over and above those currently included in later years of the MTFS.

3.7 Alongside driving 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.

3.8 Due to the financial pressure 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 Heath** (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).

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 reduce the care package spending trajectory, by transforming and improving the customer journey 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, Cabinet approved up to £8m of investment in this programme over 2024/25 to 2026/27.

Current 2024/25 budget position

4.4 At the end of November an overspend of £3.6m was forecast against AWHP's 2024/25 budget. This was due to a forecast £3.9m overspend on care package spend and a £2.0m overspend on staffing & other expenditure budgets, partially mitigated by a forecast £1.6m underspend on wider support services, £0.5m additional ASC funding and a £0.2m underspend against the budget set for Public Health and Communities. AWHP continue to seek to identify mitigations to reduce the overspend.

4.5 The annual cost of all active care package commitments at the end of November 2024 was £8.3m higher than the 2024/25 budget. 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, but a risk remains that pressures above what is currently planned for carry over into 2025/26. Workforce pressures in 2024/25 also have an ongoing impact, with £4.2m of staffing pressures included in 2025/26, in addition to pay inflation.

Financial pressures

4.6 The 2025/26 revenue budget for AWHP includes £53.0m of growth to cover pressures, with pressures of £215.9m included across the 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 (£23.0m in 2025/26, £82.0m across the MTFS) and workforce pressures including pay inflation and the estimated cost of increased National Insurance contributions (£8.0m in 2025/26, £16.2m 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 revenue budget includes £33.0m of efficiencies, with £99.8m planned across the 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 £82.7m 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 £14.6m of efficiencies in 2025/26, £17.0m 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 (£7.8m in 2025/26), increase income from the NHS for ASC funded clients under Section 117 Aftercare or Continuing Health Care regulations (£3.9m across the MTFS), improved purchasing of older people nursing/residential packages (£1.9m across the MTFS), £1.6m related to planned changes to ASC charging policies and improved debt collection, £1.4m of efficiencies across the MTFS that relate to Public Health and Communities Services and £0.4m of leadership efficiencies.

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 proposals across these workstreams, with £29.9m spent in prior years.

- Your Fund Surrey - a capital fund for large and small community projects. £10.0m is included in the capital programme for 2025/26.

- Community equipment – £1.5m per year across the MTFS.

Horizon scanning

4.11 Sustained and significant demand, inflation 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 programme, which is vital to future financial sustainability, as well as continuing to take all opportunities to operate more efficiently.

CHILDREN, FAMILIES AND LIFELONG LEARNING

Context

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

Current 2024/25 budget position

4.14 The budget position at the end of November 2024 is a forecast overspend of £8.8m. The largest area of pressure relates to the cost of home to school travel assistance (£7.0m), 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 majority of the remaining pressures.

Financial pressures

4.15 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.

4.16 In addition, the costs of social care placements continue 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

4.17 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 alongside regular reviews of single use taxis and passenger assistants.

- Prevention has been a particular focus across all areas of CFLL 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

4.18 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

4.19 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.

PLACE

Context

4.20 The Place Directorate is a future-focused Directorate which aims to shape places, improve the social, economic, built and natural environments, and support delivery of environmental, sustainability and climate change targets. Place provides many "universal services and spaces" which many or all residents can access - including highways, waste management, Public Rights of Way and the Surrey County Council countryside estate. 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;
- Access to the countryside, including Public Rights of Way;
- Planning & Development;
- Supporting the County's and Council's response to environmental improvement and climate change including climate resilience, flooding and water quality, carbon reduction, biodiversity and nature recovery
- Provision and maintenance of the Council's land & property estate; and
- Supporting economic growth.

4.21 Over the period of the Medium-Term Financial Strategy, Place's key priorities are to:

- **Financial Sustainability:** Strengthen financial stability by leveraging funding opportunities, exploring commercial ventures, fostering partnerships, and innovating service delivery to maximise value for money.
- **Transport Investments:** Prioritise funding for enhanced bus services, half-price travel schemes, digital demand-response transport, and EV network expansion to align with climate goals and resident needs.
- **Highways Improvements:** Ensure efficient allocation of resources to improve the quality of works, foster innovation, and enhance operational effectiveness with highways contract providers.
- **Economic Growth:** Allocate resources strategically to support businesses, develop skills, and create employment opportunities as part of the economic strategy.
- **Waste Management Efficiency:** Fund initiatives aimed at reducing domestic waste and increasing recycling rates to improve environmental performance.
- **Climate and Nature Goals:** Invest in carbon reduction, climate resilience, and nature recovery targets through strategies like the Surrey Transport Plan, Surrey ADEPT, the Climate Change Delivery Plan and the Local Nature Recovery Strategy.
- **Capital Programme Delivery:** Secure and allocate funding for key projects, including highways maintenance, infrastructure improvements, and Land & Property developments, while building a pipeline for future schemes.
- **External Funding Maximisation:** Continue to identify and secure grants, developer contributions, and other income streams to support revenue and capital activities.
- **Targeted Investment in Communities:** Direct funding to areas with the greatest need, ensuring alignment with Council priorities and the No One Left Behind agenda.
- **Placemaking and Partnerships:** Align investments to deliver the Surrey Place Ambition and support partnerships with anchor institutions for shared outcomes in local government initiatives.

Current 2024/25 budget position

4.22 Place'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 estates.

4.23 A significant proportion of the Directorate's budget is linked to contracts, and Place therefore recognises the need to work in close partnership with providers and markets to explore opportunities for efficiencies.

4.24 At month 8 Place forecasts an overspend of £8.1m mainly due to:

- pressures within Land and Property (£4.3m) due to facilities management, one off back dated energy costs, one off dual running operation of office buildings and reduced rental income,

- pressures within Highways and Transport (£2.6m) due to additional verge maintenance works. Further pressures associated with parking and traffic enforcement, and transport costs including concessionary fares, are mitigated within the wider service budget, and

- 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.

Financial pressures

4.25 The Place 2025/26 draft revenue budget includes pressures of £17.5m, £38.5m across the whole MTFS period to 2029/30, including:

- Inflation: significant spend within Place is delivered through medium- and long-term contracts including bus services, highway maintenance, facilities management 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 non-staffing inflation at 2% (£2.3m) for 2025/26. Pay inflation is also included at 3% (£1.5m) for 2025/26. Changes to National Insurance contributions result in a cost of £1.1m which is expected to be funded through additional Government Grant.

- Waste pressures of £3.5m, after taking account of changes in grant funding, include increased net costs of managing dry mixed recyclables, changes to contract costs (offset by efficiencies) and costs associated with and funded through the Extended Producer Responsibility (EPR) grant (see below).

- Highways & Transport pressures include improvements to verge maintenance, weed control and other visual improvements (£5m), changes to the timing of bus and digital demand responsive transport services and grant funding (£2.1m net pressure), increased parking contract costs linked to inflation (£0.5m), a one-off sum to address a backlog of highway tree works (£0.5m), and an expected pressure following national changes to reimbursement of bus operators for concessionary travel (£0.6m).

- The MTFS reflects changes in line with Government waste reforms, including the EPR grant and associated costs. EPR aims to transfer the cost of managing packaging waste from the taxpayers to packaging producers, with incentives on those producers to reduce unnecessary and more difficult to recycle waste. As part of these changes the Council will be compensated for the cost of managing packaging waste through an EPR grant, and it has been provisionally notified it will receive grant of £9.3m in 2025/26. This will be used to offset the cost of managing packaging, as well as supporting the maintenance and development of future infrastructure required to manage recycling effectively and efficiently, and the procurement of new contractual arrangements. EPR grant is expected to reduce over time, as producers make improvements and reduce the amount of packaging. EPR is part of wider national waste reforms including changes aimed at simplifying and standardising recycling, and the expansion of the Emissions Trading Scheme to include the waste sector, which will introduce charges for the fossil-based emissions arising from incineration and energy from waste treatments. While

further details are awaited, however this is currently expected to result in higher costs for the Council from 2028/29.

Financial Efficiencies

4.26 The Place 2025/26 revenue budget includes efficiencies totalling £10.6m, £16.5m across the MTFS period to 2029/30, including:

- Waste efficiencies including retender of residual waste, dry mixed recycling and other contracts (£4m), 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 including maximising income and staffing changes.
- These are offset by unachieved prior year Agile programme efficiencies (£1.3m).

Capital budgets

4.27 Place 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. Place'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, Farnham infrastructure programme, 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.
- The Council's carbon reduction plan through investment in electric vehicles, EV charging networks and decarbonising SCC's real estate.
- 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

4.28 In future years further opportunities are anticipated in a few areas.

- 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.
- The revised National Planning Policy Framework (NPPF) and ongoing consultations are heralding a return to Spatial Planning, likely to be over a county level geography, as a minimum. Taking the form of a Spatial Development Strategy (SDS), this will guide investments and development securing positive social, environmental and economic outcomes.
- The Government have recently published the white paper on Local Government Reorganisation, and although we don't know yet how the detail of this may impact Surrey as a County, there are clear opportunities that could ensue which will have an impact on the Place agenda, not least by simplifying local government and devolving more powers locally.

COMMUNITY PROTECTION & EMERGENCIES

Context

4.29 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.

4.30 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.

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

Current 2024/25 budget position

4.32 CP&E currently has an annual revenue budget of £43.9m. At month 8 ,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

4.33 The CP&E 2025/26 revenue budget includes growth for pressures of £2.3m, with pressures of £7m included across the 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.
- National Insurance increases, expected to be funded through Government funding, £1m.
- 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.

Financial Efficiencies

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

Capital budgets

4.35 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

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

RESOURCES

Context

4.37 The Resources Directorate sits at the heart of the Council, predominantly responsible for enabling services across the Council, but also for some front-line services. The directorate is committed to providing highly effective support to colleagues across the council, spanning the breadth of our functional responsibilities, but in a way that feels joined up and responsive.

4.38 The aim of the Resources Directorate is to be seen as a 'True Business Partner' by all colleagues and customers. This means supporting and enabling service colleagues to achieve as the primary objective of 'One Council', because through them Resources is contributing to great outcomes for Surrey and Surrey residents. The directorate also aims to embody the culture of Surrey County Council as a successful and effective organisation; demonstrating the same agility and responsiveness that we all aim to provide to residents; thinking primarily about the customer perspective and issues, rather than Resources own organisational structure and arrangements.

4.39 The Directorate has a key role in managing the overall financial resources of the Council, 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.

4.40 The directorate's focus in the medium term is:

- Delivering highly effective and value for money services

- Delivering high impact collaborative support, to enable the organisation to deliver high quality services and good outcomes for residents.

- Empowering our people to reach their full potential across the organisation, ensuring no one is left behind.

- To deliver excellent financial management by ensuring a balanced and sustainable budget, providing insight and solutions, supporting robust commercial activity and investing in the services that matter to our residents.

- Supporting the organisation to become agile and dynamic in our ways of working.

- Providing efficient systems and governance to enable the organisation to deliver high quality services and good outcomes for residents.

- Continually challenging ourselves and others to improve and innovate for the benefit of our residents.

- The Directorate also provides 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.

- The directorate 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 8 is balanced, £1.3m of underspends relating to holding vacant posts are offsetting forecast overspends. Where these variances will continue into 2025/26 they are built into the budget.

Financial Pressures

4.42 The 2025/26 revenue budget for the Directorate includes growth to cover pressures of £6.3m. The majority of these are inflationary pressures of £3.2m. Uplifts in Microsoft licences and continued support of MySurrey adds further pressures of £0.6m.

4.43 The main non-inflationary budget pressure relates to the Fleet Team and funding National Insurance policy changes, which represents a budget pressure of £2.1m in 2025/26.

Financial Efficiencies

4.44 The directorate has identified £4.3m of efficiencies in 2025/26:

- the majority of these relate to Organisational Redesign and Customer Transformation (£2.6m) to be delivered through staffing reductions and council wide reductions in IT licences due to staffing changes;

- maximising income through rate and volume increases should deliver £0.5m;

- the re-procurement of the wide area network and Woodhatch bus service will deliver savings of £0.4m;

- mobile phone reductions will deliver £0.25m;

- plans to reconfigure the welfare offer provided by the Crisis Fund are also included (£0.2m);

- Cultural Services efficiencies include uplifts in charges for services and staffing reductions as well as non-staffing operational efficiencies, such as subscriptions (£0.2m);

- Various smaller efficiencies across services (£0.1m), including cross cutting Coroner's staffing reductions.

Capital budgets

4.45 The Directorate has significant capital investment and delivery plans relating to the Council's IT&D services over the MTFS period (£17.1m). These investment plans support staff to carry out their responsibilities.

4.46 The capital 2025-30 pipeline and budget contains £13.3m 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.

4.47 The capital pipeline and budget also includes £1.2m to develop the mortuary and £2m to invest in Registration buildings.

Horizon scanning

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

5. FINANCIAL STRATEGY AND BUDGET FOR 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.

Hallmark	Self-Assessment
The budget has a Medium-Term focus which supports the Strategic Plan	• 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 projected budget pressures being in excess of anticipated funding increases and identified efficiencies. The continuation of medium-term planning and transparency over the scale of the challenge enables the Council to look across multiple years and continue to focus attention of the identification of efficiencies in the medium term.
	• The budget process has been coordinated across Directorate Leadership Teams, Corporate Strategy & Policy, Transformation and Finance. The Council continues 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 continues to look for cross-cutting opportunities to drive efficiencies 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	• The Strategic and Integrated Planning Group aims to ensure integration with the Organisation Strategy, the transformation programme and corporate and Directorate priorities.

priority outcomes	• The budget has been subject to numerous iterations through Cabinet and CLT over the last twelve 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	• Earmarked Reserves and the General Fund are reviewed to ensure they remain appropriate to meet the assessed risk environment and specific pressures to ensure our continued financial resilience, despite an increasingly volatile and uncertain external environment. • Reserves are assessed in the context of the risk environment in which we operate but also with reference to levels recommended by external auditors, 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. • The Budget Report annually sets out agreed principles for the management of reserves, setting a minimum level compared to the total net revenue budget, as well as agreeing the use of reserves for one-off or time-limited purposes. • 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 for investment 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	• The Council's Select Committees are 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. Formal scrutiny of the Draft Budget was carried out in 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 by all Councillors.
The budget is integrated with the Capital Programme	• The Capital Programme (see Section 6) is developed alongside the revenue budget and is overseen by the Capital Programme Panel to ensure it demonstrates delivery of corporate and service priorities and sets out the impact and linkages with the revenue budget. • Dedicated capital sessions have been held with CLT 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 projects taking into account parameters such as alignment to corporate priorities and impact on the revenue budget.

	• The full borrowing costs of 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	Two approaches to consultation have been taken (see Section 10): • An engagement exercise asking stakeholders what their 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. • When the Cabinet considered the Draft Budget in November 2024, a further consultation exercise was launched, to provide residents and organisations with information on key proposals within the Draft Budget and seek their views on the financial efficiencies that the Council is pursuing.

Budget Principles

5.2 For successive years, the MTFS 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, across the Council, integrated with transformation and capital investment;
- 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 and efficiencies are cascaded to all management layers to ensure delivery, including for 2025/26 the enhanced expectation that detailed delivery plans are in place for all;
- Pay and contract inflation is to be managed within Directorate budget envelopes;
- Fees and charges are reviewed and benchmarked;
- A corporate transformation fund is held centrally;
- A corporate redundancy provision is held centrally; and
- There is a budgeted contribution to reserves to enable funding of one-off and transformational activity and to continue to improve overall financial resilience.

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 revenue budget has been developed during a period of significant uncertainty; with a change in Government leadership, policy changes, uncertainty over funding, the continued impact of increased

cost-of-living, economic uncertainty and forecast increased demand for services in 2025/26. 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, particularly in relation to forecast inflation and the ongoing impact of in-year changes to demand pressures; culminating in the final budget, with the following main changes from 2024/25:

- An increased budget of £55.7m
- Total pressures of £122.1m, comprising
    - Staffing pressures of £21.7m (including £8.4m relating to increases in National Insurance contributions)
    - Contract & Price inflation of £37.2m
    - Demand and other pressures of £63.2m, including capital financing costs of £10.4m; and
- Efficiencies of £66.4m

5.6 In setting the budget for 2025/26, pay, contract and price inflation has been calculated by Directorates, informed by corporate assumptions. Pay inflation at 3% has been calculated by Directorates, in addition to other pay and recruitment pressures. This is a planning assumption only and does not represent the proposed pay award. The actual pay award for 2025/26 will be decided by the People, Performance and Development Committee after formal consultation. Any further pressure or reduction from the 3% will be dealt with in-year. Contract and price inflation has been set based on a blended assumption of annual average RPI and CPI of 2% for 2025/26, with variations for specific contracts and market variations where appropriate. Inflation has been included in Directorate envelopes.

5.7 The revenue budget envelopes for Directorates, Central Income and Expenditure and Funding are summarised in the table below. Overall, net expenditure has grown by £55.7m (4.6%):

- Pressures and Efficiencies are set out in further detail in **Annex A**
- A breakdown of the 2025/26 budget by Directorates and Services in **Annex B**.

Table 2: Summary Budget Position for 2025/26

Directorate	Restated 2024/25 Budget £m	Pay Pressures £m	Contract & Price Inflation £m	Demand & Other Pressures £m	Efficiencies & Funding £m	Total Movement £m	Budget 2025/26 £m
Adult, Wellbeing & Health Partnerships	506.0	4.7	20.3	27.9	-33.0	20.0	**526.0**
Children, Families & Lifelong Learning	294.9	6.7	5.6	19.4	-12.6	19.1	**314.0**
Place	190.5	2.6	2.8	12.1	-10.6	6.9	**197.4**
Community Protection & Emergencies	44.1	2.4	0.2	-0.3	-0.8	1.5	**45.6**
Resources	78.5	5.3	-0.1	1.1	-4.3	2.0	**80.5**
Total Directorate Budgets	**1,114.0**	**21.7**	**28.9**	**60.2**	**-61.4**	**49.4**	**1,163.4**
Central Income & Expenditure	94.4	0.0	8.3	3.0	-5.0	6.3	**100.7**
Total Net Expenditure	**1,208.4**	**21.7**	**37.2**	**63.2**	**-66.4**	**55.7**	**1,264.1**
Business Rates (including related grants)	-154.6				1.8	1.8	**-152.8**
Grants	-135.2				-2.9	-2.9	**-138.1**
General Council Tax	-784.1				-37.3	-37.3	**-821.4**
Adults Social Care Precept	-130.8				-20.1	-20.1	**-150.9**
Collection Fund (Surplus) / Deficit	-3.7				2.8	2.8	**-0.9**
Total Funding	**-1,208.4**	**0.0**	**0.0**	**0.0**	**-55.7**	**-55.7**	**-1,264.1**

National Funding Context

Autumn Budget & Local Government Finance Settlement

5.8   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. The statement included an indication that council tax referendum principles would continue and that there would be more funding forthcoming for Social Care. In addition, it was confirmed that the Employers National Insurance threshold would reduce and the rate would increase to 15% as well as increases to the National Living Wage (NLW).

5.9   The Policy Statement issued on 28 November suggested Council Tax referendum levels would continue and there would be a new Children's Social Care grant in addition to the increase in the existing Social Care grant, but at the same time some grants would significantly reduce. It was made clear, that the government would target the additional funding on the most-deprived local authorities, as well as on those authorities with social care responsibilities and that adjustments would be made to reflect a council's ability to raise income through council tax increases.

5.10   The Provisional Local Government Finance Settlement (LGFS) followed on the 18 December and provided more details for 2025/26. Government figures indicate an average increase in Core Spending Power (CSP) nationally of 6% (cash terms) in 2025/26, 3.5% (real terms). A significant proportion of this increase comes from the presumption that all councils will levy the maximum increase in council tax permitted.

5.11   Announcements included £1.3 billion of additional funding for local authorities, including at least £880 million for social care. Surrey County Council saw increased funding through the increase in the Social Care Grant and through the new Children's Social Care Prevention Grant. However, the Funding Guarantee and Services Grant, worth £9.1m and £0.8m respectively to the Council in 2024/25, were significantly reduced. As such, the net overall change to grant funding since the draft budget for the Council was only £2.9m.

5.12   The Budget announcements on the 30 October included a rise in Employers National Insurance Contributions. This will increase the Council's own wage bill, as well as that of many of our suppliers, which will likely feed through into increased costs. The direct impact on the Council's wage bill is factored into the budget proposals, along with an estimate of the compensation grant the Council will receive for the impact of National Insurance Contribution increases. This compensation funding was not confirmed in the Provisional LGFS and will not be confirmed until the Final Settlement in February 2025. There remains a risk that funding is not sufficient to offset the increase in the Council's wage bill experienced through this change.

Final Funding for 2025/26

5.13   Total funding for 2025/26 for Surrey County Council is set out in the sections below.

Council Tax Funding £977.7m (Council Tax £972.3m plus collection fund surplus £5.5m)

5.14   The Policy Statement, released at the end of November 2024, confirmed that core council tax referendum principles would continue for 2025/26. This means councils can increase core council tax by up to 3% without the need for a referendum and can raise up to 2% in an additional adult social care precept.

5.15   In setting the budget, the Council has built in a 2.99% increase in core council tax and a 2% increase in the Adult Social Care precept, resulting in a proposed increase in council tax of 4.99% in 2025/26. This equates to an increase of £1.69 per Band D Property per week (£87.75 per year, £52.58 core and £35.17 social care precept).

5.16   In setting the tax base for future years, the District and Borough councils make allowances for growth in new properties, increases to reliefs, irrecoverable amounts and appeals. Going into next year, growth equates to 1.2% increase to the tax base.

5.17   **Full details of the Council Tax Requirement and breakdown of the taxbase by District and Borough can be found in Annex E.**

5.18 The Council also needs to consider the potential surplus or deficit relating to actual collection of council tax when setting the budget. This is the difference between the estimated council tax collectable each year, and that collected, based on information received from the Borough and District Councils, as collection authorities.

Table 3: Council Tax Requirement

Council tax	2024/25 £m	change £m	2025/26 £m
Core council tax	784.1	37.3	821.4
ASC precept	130.8	20.1	150.9
Council tax requirement	914.9	57.4	972.3
Collection fund surplus(+)/deficit(-)*	6.2	(0.7)	5.5
Council tax budget	**921.1**	**56.6**	**977.7**

* As a precepting authority, Surrey County Council are required to use the forecasts adopted by the billing authorities for collection fund surplus/deficits. These are received too late in the budget setting process to enable robust analysis or testing of assumptions and volatility in future collection fund figures is exacerbated by economic uncertainty and increased cost of living which could impact collection rates. The Council therefore takes a prudent approach, making a transfer to reserves where forecasts are unusual, as there is a high possibility of a correction next financial year. The 2025/26 collection fund surplus is net of a £8m transfer to reserves.

Business Rates Funding £148.2m (Business rates £152.8m less collection fund deficit £4.6m)

5.19 As part of the Autumn Budget and the Provisional Local Government Finance Settlement, the Government confirmed that local authorities will be compensated for a continued freeze in the small business rates multiplier and will see an increase in the total of baseline funding levels (BFLs), as if both had increased by CPI. This has been modelled into our assumptions for business rates funding.

5.20 As with council tax, the Council also needs to consider the potential surplus or deficit relating to the actual collection of business rates when setting the budget. The business rates collection fund deficit is an estimated £4.6m).

Table 4: Business Rates

Business Rates	2024/25 £m	change £m	2025/26 £m
Business Rates income	118.1	2.5	120.6
Business Rates grants and reliefs	36.5	(4.3)	32.2
Collection fund surplus(+)/deficit(-)	(2.6)	(2.0)	(4.6)
Business Rates budget	**152.1**	**(3.9)**	**148.2**

Grant Funding £138.1m

5.21 All grant assumptions have been updated to reflect the information provided through the provisional Local Government Finance Settlement.

5.22 In total general **grants have increased by £2.9m** from 2024/25. The increase is broadly driven by:

- o Increase in Social Care Grant, £10.7m
- o Children's Social Care grant, £2.1m
- o Increase in Public Health Grant (to be confirmed), £0.7m

offset by:
- o Removal of the Funding Guarantee (£9.1m)
- o Removal of Services Grant (£0.8m)
- o Reduction in other smaller grants, for example New Homes Bonus (£0.7m)

5.23 The **total £138.1m general grant funding in the budget** includes the following main elements:

- Social Care Grant - £80.4m
- Public Health Grant - £42.6m (to be confirmed)
- PFI credit funding for Streetlighting - £6.0m
- Dedicated Schools Grant Funding for Council services £5.5m
- Children's Social Care grant £2.1m
- Other Smaller grants (including the New Homes Bonus) £1.5m

Overall Funding

5.24 The funding picture set out above, results in overall funding as follows; with funding for 2025/26 £55.7m higher in total than 2024/25:

Table 5: Funding assumptions:

	2024/25 £m	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m
Council tax	921.1	977.7	996.4	1,024.4	1,053.1	1,082.7
Business Rates	152.1	148.2	158.0	160.5	159.4	138.4
Grants	135.2	138.1	116.7	86.9	61.5	54.3
Total Funding	**1,208.4**	**1,264.1**	**1,271.1**	**1,271.8**	**1,274.0**	**1,275.3**

5.25 For a number of years, the most significant anticipated influence on the Council's funding has been the long-awaited implementation of fundamental Government funding reform. Government has confirmed its commitment to implementing a revised assessment of needs and resources and the current planning assumption is that these will be implemented from 2026/27 and that reform would see the Council's Government grant funding drop significantly over the medium-term. 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. Section 8 sets out the main factors influencing medium-term funding projections.

Reserves & Risk Mitigation Strategy

5.26 The Council is required to maintain an adequate level of reserves to deal with future forecast or unexpected pressures. We are not permitted to allow spend to exceed available resources which would result in an overall deficit. Sections 32 and 43 of the Local Government Finance Act 1992 require authorities to have regard to the level of reserves to meet estimated future spend when calculating the budget requirement.

5.27 Reserves can be held for three main purposes:

o A working balance to help cushion the impact of uneven cash flows and avoid unnecessary temporary borrowing;

o A contingency to cushion the impact of unexpected events or emergencies; and

o A means of building up funds (earmarked reserves) to meet known or predicted liabilities.

5.28 The appropriate level of reserves needs to be considered alongside an assessment of the Council's risk environment. The higher the risk inherent in budget planning cycle, the higher the level of reserves needs to be in order to mitigate this risk. Therefore, an assessment of the risk environment is required in order to determine the suitability of the baseline reserves position, this assessment should include consideration of the robustness of efficiency plans, levels of uncertainty (demand / price), policy changes and wider national economic and political factors.

5.29 The budget proposes the following principles for the management of reserves:

▪ Reserves should only be used to fund one-off or time-limited investment that will drive out efficiencies, deliver the capital programme or improve the delivery of services and council priorities;

▪ Reserves cannot be used as a substitute for permanent efficiencies to meet permanent spending pressures;

▪ Reserve contributions should be reviewed annually to ensure contributions are equal to planned use over the medium-term;

- Budgets such as the Transformation Fund (£6.5m) and Capital Feasibility Fund (£5m) should be seen as contributions to reserves, with any use drawn-down from the reserve when needed;

- Over the medium-term, reserves should stay flat or ideally increase – as financial uncertainty, the efficiency requirement and the investment ambition will remain high across the MTFS period. As such, the budget proposes a planned contribution to reserves of £20m to enable further funding of one-off and transformational activity and/or continue to improve overall financial resilience;

- Reserves should ideally not drop below 10% of the net budget. It is proposed to implement a 2% buffer over the 10% threshold that establishes the following three levels:

  - Minimum – reserves do not drop below 10% and, if they do, are rebuilt as soon as possible in the following years' budget

  - Basic – reserves do not drop below 12% (10% + 2% buffer) and, if they do, are rebuilt to at least 12% over medium-term

  - Enhanced – reserves stay flat or grow, dependent on analysis of the risk environment.

- To avoid a programmed reduction in reserves, the use of reserves to support Transformation or other investment should be less in any given year than the planned budgeted contribution to reserves.

5.30 Given future funding uncertainty, retention of the Council's reserves will be essential in order to mitigate risk and protect against unplanned pressures and/or the non-delivery of planned budget efficiencies.

5.31 **General Fund** - The Council has traditionally maintained a low General Fund balance (c2% of the net revenue budget). Although there is no generally recognised official guidance on the level to be held, the level should be justifiable in the context of local and external economic factors, and that taxpayers' money should not be tied up unnecessarily. The level of General Fund balance is low by comparison to other authorities. We have held an ambition to increase it over time and as at 31 March 2024, the General Fund Balance stood at £49.1m (4.1% of the 24/25 net revenue budget).

5.32 For 2025/26, a thorough review and repositioning of all earmarked reserves has been undertaken. A number of historic reserves are proposed to be re-purposed for future commitments and to align Cabinet approvals for the use of reserves for specific items of expenditure. A summary of the earmarked reserves and a forecast of the reserves and balances as at 31 March 2025, can be found in Annex D.

5.33 Following the review of earmarked reserves, the balances available to provide financial resilience against unforeseen events stands at £70.9m. Taken alongside the forecast General Fund position, this results in £121.4m, or 10% of the 2025/26 net revenue budget, of cover to mitigate against future risk and uncertainties.

5.34 On the basis of the above, and the planned contribution to reserves of £20m in 2025/26, the Section 151 Officer considers the 2025/26 Budget to be robust.

Staffing Position

5.35 As part of the Council's transformation plans, there is a continued commitment to reduce the Council's overall staffing cost. These budget proposals include efficiencies of £13.7m over the medium-term planning period, linked to an estimated reduction in FTE (full time equivalent) of 207.

5.36 In addition, there is a further FTE reduction target of £3.5m within Central Income and Expenditure to be delivered in-year through the Organisational Re-design Programme. This efficiency will be allocated out to Directorates based on further analysis driven through the programme. It is estimated that this will increase the figure above by approximately 80 FTE, bringing the total to 287 FTE.

Fees & Charges

5.37 A commercial review of all services generating fees and charges income has been undertaken during 2024/25. As a result, Fees and Charges income in 2024/25 is forecast to be c£57m with an increase

to c£59m in 2025/26, largely due to inflationary price increases and expected increases in demand for some services. The main areas of income generation from this source are:

- £9.2m in Children, Families, Learning and Community mainly for Surrey Outdoor Learning and Development and Surrey Online School,

- £8.6m in Customer & Communities including the Registration and Nationalisation Service, Surrey Arts and the Library Services,

- £19.6m in Place including parking income, highways and transport development planning

- £21.3m in Resources relating mainly to Twelve15 (schools catering and services).

5.38 When setting 2025/26 fees and charges, most services will apply an assumed inflation rate of 2%. However, each service is expected to recover the full cost of provision, which may affect the rates set. Where it has been found that services are not recovering the full cost of provision, an action plan has been agreed to achieve recovery in future years.

CIPFA FM Code of Practice

5.39 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.'

5.40 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 have carried out a review of practices in place for the 2024/25 financial year against the guidance and concluded that:

- the Council can demonstrate overall compliance with the standards;
- as a result of the focus on financial management capabilities as part of the Finance Improvement Programme, the Council has improved its budget accountability arrangements, and further improvements continue to be made; and
- evidence could be strengthened for a small number of indicators, including long term sustainability and medium term scenario planning;

5.41 The results of the Council's self-assessment against the Code are set out in Annex J, including areas where further development or improvement would be beneficial.

6   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 Our aspirations remain high and the 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.

6.3 Despite these continued ambitions, the economic environment has changed over recent years. Recent high construction inflation has driven up the cost of scheme delivery and successive interest rate rises have increased the cost of financing borrowing.   While it is widely anticipated that interest rate rises have peaked, there remains uncertainty on the path of interest rates.

6.4 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 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.

6.6 The Council continues to operate 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.

6.7 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.

6.8 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.

6.9 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 2025/26 – 2029/30

6.10 The Capital Programme 2025/26 – 2029/30 of £1,398.8m is set out in more detail in **Annex C**. This consists of £1,016.8m in the capital programme and a further £382.0m in the capital pipeline.

Capital Budget

6.11 A total of **£1,016.8m 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 6 below shows a breakdown of budget schemes by the three SCGs and Commercial over the MTFS period:

Table 6: MTFS Capital Budget by Strategic Capital Group (excluding pipeline):

Strategic Capital Group	MTFS Budget (£m)
Infrastructure	487.5
Property	510.1
IT	14.8
Commercial	4.4
Total Budget	**1,016.8**

6.12 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 70% of the total estimated budget:

- £238m - 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)

6.13 £344m is included in the capital budget for 2025/26, as set out in the table, below.

Table 7: 2025/26 Capital Budget by Strategic Capital Group:

Strategic Capital Group	2025/26 Budget (£m)
Infrastructure	166.6
Property	170.3
IT	32.9
Commercial	4.2
Total Budget	**344.0**

6.14 Successful delivery of the 2025/26 budget is a key part of ensuring the Capital Programme overall remains on course. 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 63% of the 2025/26 budget:

- £66m - Highway Maintenance – improvements to roads and footways across the County.
- £35m - SEND Strategy – increasing sufficiency of provision for special education needs and disability in schools across Surrey
- £21m - 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
- £12m – Supported Independent Living (Learning Disabilities Phase 1)
- £11m – Local Highways Schemes
- £11m – Alternative Provision Strategy – investment in Pupil Referral Unit places and improvements for improved pupil support
- £8m – Bridge/Structures Maintenance – improvements and safety maintenance of specialist infrastructure.

Pipeline Schemes

6.15 **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 8: MTFS Capital Pipeline by Strategic Capital Group:

Strategic Capital Group	MTFS Pipeline (£m)
Infrastructure	303
Property	67

IT	2
Your Fund Surrey	10
Total Pipeline	**382**

6.16 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.

6.17 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.

6.18 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 – Supported Independent Living (Learning Disabilities batch 2)
- £11m – Surrey Infrastructure Plan, contribution to A320 HIF

Environmental Sustainability

6.19 The capital programme contains £188m for schemes that contribute to reducing carbon emissions, tackle climate change and enable a greener future for residents. A further £165m is included in the capital pipeline, bringing the total to c.£353m.

7 FINANCIAL PERFORMANCE 2024/25

7.1 The Month 8 Financial report is presented to Cabinet on 28th January 2025. Headline performance is set out below.

7.2 **Revenue:** As at November 2024 (Month 8), 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. In addition, the Council is forecasting overspends in Land and Property relating to the re-procurement of the facilities management contract and one-off costs relating to utilities and office running costs.

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, undertook a detailed review of the programme to validate and ensure deliverability. The re-phased capital programme stands at £321.4m at the end of November.

7.6 The forecast at M8 is for full year spend of £325m, representing a £3.6m 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 8 (November) Financial Report to Cabinet on 28th January 2025.

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 provide for the ongoing impact of Directorate variances from the current financial year, where they are expected to continue. Demand pressure trajectories have been modelled 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. These increased pressures in-year significantly escalate the efficiency requirement in 2025/26.

8 MEDIUM TERM FINANCIAL OUTLOOK 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.£172m. This is driven by:

- Growth pressures: including demand and inflation: c£370m;
- Increased borrowing costs of the capital programme: £35m;
  Partly offset by:
- An overall increase in funding: c£67m;
- Less efficiencies identified to date: c£167m.

8.2 The council needs to focus attention 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 9: MTFS Gap to 2029/30

	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	Total £m
Brought forward budget	1,208.4	1,264.1	1,298.9	1,341.2	1,391.5	
Directorate Pressures	111.7	63.4	61.5	67.4	66.2	**370.2**
Increased borrowing costs of Draft Capital Programme	10.4	9.2	6.3	5.8	3.4	**35.1**
Identified Efficiencies	(66.4)	(37.8)	(25.5)	(23.0)	(14.0)	**(166.6)**
Total Budget Requirement	**1,264.1**	**1,298.9**	**1,341.2**	**1,391.5**	**1,447.1**	**238.7**
Change in net budget requirement	55.7	34.8	42.3	50.2	55.7	238.7

Opening funding	**1,208.4**	**1,264.1**	**1,271.1**	**1,271.8**	**1,274.0**	
Funding (reduction) / increase	55.7	7.0	0.7	2.3	1.3	66.9
Funding for Year	**1,264.1**	**1,271.1**	**1,271.8**	**1,274.0**	**1,275.3**	

Overall Reductions still to find	**0.0**	**27.9**	**69.5**	**117.4**	**171.8**	
Year on Year - Reductions still to find	0.0	27.9	41.6	47.9	54.4	171.8

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% and an Adult Social Care Precept increase of 2% for 2025/26 and Band D rate increase of 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 2026/27.

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 makes 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 committed to multi-year settlements and launched a spending review to conclude in 2025, Funding Reform has been modelled to take effect from 2026/27. Confirmation over the timing of the reform is crucial to planning, not least because of the anticipated reduction in overall funding. Currently, transitional arrangements are assumed to phase and mitigate 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 is likely to increase the Council's reliance on Council Tax.

8.7 The Government has pledged to reform the business rates system, initially appearing to be aimed at levelling the playing field between the high street and online retailers. With limited detail on the potential impact on local authorities, the 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 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 DEDICATED SCHOOLS GRANT

9.1 The Council is required by law to formally approve the Total Schools Budget, which comprises Dedicated Schools Grant funding and post 16 grant funding. This budget is used to fund schools' delegated and devolved expenditure and other maintained schools' expenditure, nursery education provided by state schools and private providers plus expenditure on a range of school support services specified in legislation. The Total Schools Budget, as presented here, is shown both before and after subtracting funding allocated to individual academy schools which is deducted from the Council's Dedicated Schools Grant and paid directly to the academies by the government but is based on the funding formula and number of funded SEN places agreed by the Council.

9.2 The Total Schools Budget is a significant element of the proposed total budget for the CFLL Directorate. Table 10 outlines the proposed Total Schools Budget for 2025/26 of £1,392m including a planned overspend of £31m on the High Needs Block, £9m "safety valve" contribution from DfE and approximately £5.1m sixth form grant for school sixth forms (yet to be confirmed). From this, an estimated £653m is paid directly by DfE to academies and colleges, leaving a net schools budget of £739m which is included within the Council's overall budget.

Table 10 - Analysis of Total Schools Budget for 2025/26

	Schools' & nurseries delegated budgets	Centrally managed budgets	Total
	£m	£m	£m
Gross DSG allocated to Surrey in 2025/26	1,125.4	221.1	**1,346.5**
Sixth form grant	5.1		**5.1**
Anticipated DFE safety valve contribution		9.0	**9.0**
Planned overspend		31.0	**31.0**
Total Schools Budget incl funding allocated directly to academies	1,130.5	**261.1**	**1,391.6**
less paid directly by DfE to academies and colleges (est)	(652.9)		**(652.9)**
Net Schools Budget	**477.6**	**261.1**	**738.7**

9.3 For this purpose, centrally managed budgets include the costs of:

- Placements for pupils with special educational needs in non-maintained special schools and independent schools;

- Funding of state maintained special schools and SEN centres, other than place funding already agreed;

- Part of the cost of alternative education (apart from place funding for pupil referral units);

- Additional support to pupils with special educational needs; and

- A range of other support services including school admissions. Funding for private nursery providers counts as delegated.

9.4 In 2025/26 total DSG includes an estimated increase of £64m, most of which is for the full year impact of the extension of funded early education and childcare to children aged 9 months to three years of working parents, and for the further extension of funded early education and childcare for this age group from 15 hours a week to 30 hours from September 2025.

9.5 Schools are funded through a formula based on pupil numbers and ages with weightings for special educational needs and deprivation. Cabinet considered and agreed a detailed report on the 2025/26 school funding formula on 17 December 2024. The funding rates for schools for 2025/26 will be subject to amendment by the Cabinet Member for Education and Learning and the Director of Education and Lifelong Learning, to ensure affordability when all funding data for schools is known.

9.6 Schools will also receive pupil premium funding, based on the number of:

- Pupils receiving free school meals at some time in the past six years;

- Looked after children;

- Children adopted from care; and

- Pupils from service families (or who qualified as service children within the last six years, or in receipt of a war pension).

9.7 In 2024/25 schools received additional grants towards increased teacher pay and pension costs, most of which have been merged into Dedicated Schools Grant in 2025/26. Schools also received recovery premium and school led tutoring grant for the summer term only, alongside a range of other grants for example to support infant free school meals and physical education and sport in primary schools   At the point of setting the Council's budget, these grants have yet to be confirmed for the academic year 2025/26.

High Needs Block (HNB)

9.8 The HNB is an element of DSG used to support children with additional needs. Since changes in legislation around Local Authorities responsibilities were made in 2014, the rate of increase in demand has significantly outstripped increases in funding, causing significant financial pressures in this area.

9.9 In 2021 the DfE initiated a programme called "Safety Valve", which aims to provide support to those councils with the highest percentage Dedicated Schools Grant deficits through Agreements that assure a timely return to financial sustainability.

9.10 The Safety Valve agreements currently all include commitments to enable a return to in-year balance including potential financial contributions from the DfE, local authority and other DSG blocks as well as additional capital investment (assessed through a parallel bidding process).

9.11 In November 2021, the DfE invited Surrey County Council, and a number of other local authorities, to enter a second round of negotiations, and in March 2022, the Surrey agreement was formalised. Surrey's Safety Valve agreement includes additional DfE funding worth £100m over five years.

9.12 The Council provides regular monitoring reports on the 'safety valve' agreement to the DfE which include financial projections and risk management. To date, the council has received £82m of the £100m committed.

9.13 The Safety Valve return submitted by the Council in November 2024, identified that despite meeting all the expected cost containment measures identified in the Safety Valve submission, the Council is no longer on track to meet the original planned end date due to the significant increases in demand.

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 through the DfE Free Schools programme have been delayed in becoming available whilst costs and demand have grown at a faster rate than in the original assumptions and higher than the Dedicated Schools Grant. In common with many other Safety Valve authorities Surrey has requested an increased timeline to meet the target position.

9.14 The 2025/26 HNB budget includes another £9m of DfE contribution as well as a 1% (c£9m) transfer from the schools DSG block to the High Needs Block (subject to formal agreement by the Secretary of State).

9.15 The Council has a General Fund reserve to off-set the high needs block deficit. This stands at £144m and is to be used to balance the HNB deficit at the end of the Safety Valve Agreement.

10 CONSULTATION AND ENGAGEMENT

10.1 The Council has undertaken consultation and engagement with a wide range of stakeholders to inform the shape of this final budget. Due to the current financial context, a prudent approach was taken. By using internal survey tools, costs for these exercises were limited to the creation of accessible formats of consultation and engagement materials. However, this means the results illustrate the preferences of those who chose to take part and consequently, are not fully representative of the population of Surrey.

10.2 While this section of the report summarises the insights gathered from consultation and engagement on the draft budget, council services regularly consult and engage with residents and other stakeholders throughout the year and on an ongoing basis to inform their service decisions.

10.3 The approach this year was divided into two phases:

- The first phase took place in the summer of 2024. The objectives of this phase were to gather insight on what the most important priority outcomes were for stakeholders, how the budget should be allocated, approaches to balancing the budget, and conditions for supporting a council tax increase. Data was gathered from nearly 1,600 stakeholders using different methods:
  - An open survey on the Surrey Says platform (28 August – 30 September 2024) with 1,495 respondents.
  - Community events and reference groups, engaging nearly 90 residents.
  - Promotion via social media, the Surrey Matters newsletter, and local council members.

- The second phase was a consultation on the Council's draft budget after this was considered by the Cabinet at its meeting on 26 November 2024 (26 November – 31 December 2024). The purpose of this exercise was to provide residents and other stakeholders with information on the key proposals, and to seek their views on the financial efficiencies that the Council is pursuing. There were 718 respondents to this phase, of which 689 were residents.

10.4 Across both phases, over 2,200 stakeholders have shared their views including residents, partner organisations from the Voluntary, Community and Social Enterprise (VCSE) sector, businesses and elected Members.

10.5 The key insights generated across both phases were:

- Respondents' top three priorities:
  - Better roads and pavements (79%)
  - Providing care for adults and children who need us most (76%)
  - Making our communities safer (74%)

- Respondents wanted to prioritise spending to:
  - the majority of residents (54%), in contrast to services that benefit those with the greatest needs

- all areas of Surrey (64%), in contrast to local areas with the highest number of people with poor health
- meet the needs of residents today (50%), in contrast to meeting the long-term future needs of residents
- Respondents supported increasing:
  - Working with partners to provide services (80%)
  - Equipping staff to work with partners and communities (70%)
  - Providing local communities with the tools to support themselves more (63%)
- Respondents supported increases to Council Tax:
  - To protect services for the most vulnerable (67%)
  - After exhausting streamlining opportunities (66%)
- 45% of respondents recognised legitimate circumstances for an increase to Council Tax, with 38% opposing a rise
- Respondents supported the proposals to close the budget gap (49%) in contrast to opposing them (23%). Other respondents were neutral (23%) or didn't know (5%)
- Respondents to the open text questions wanted to see:
  - More money for essentials like adult social care and support for vulnerable groups, such as people who have learning disabilities
  - Better support for children and particularly those with special educational needs
  - More spending on maintaining highways
  - Better protection for the countryside and biodiversity
  - More support for the voluntary sector

10.6 Further detail on the outcomes of the consultation and engagement process that was undertaken with all stakeholders can be found in Annex H.

11 EQUALITY, DIVERSITY & INCLUSION

11.1 A high-level equality analysis on the revenue efficiencies proposals has been undertaken and is set out in Annex I. Full Equality Impact Assessments (EIAs) on specific efficiency proposals are signposted to on the Council's website through this document, reflecting their advanced stage of development. Further EIAs will be produced where appropriate before individual efficiency proposals are implemented. Members must read the full EIAs and take their findings into consideration when determining these proposals.

11.2 Members are required to have 'due regard' to the objectives set out in section 149 of the Equality Act – the Public Sector Equality Duty, i.e.the need to eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under the Act; the need to advance equality of opportunity between persons who share a relevant protected characteristic (such as Age or Disability) and those who do not share it; and the need to foster good relations between persons who share a relevant protected characteristic and persons who do not share it.

11.3 Having due regard does not necessarily require achievement of all the aims set out in Section 149 of the Equality Act. Instead, it requires that Cabinet understand the consequences of the decision for those with the relevant protected characteristics and consider these alongside other relevant factors when making the decision to pursue one course of action rather than an alternative that may have different consequences. The regard which is necessary will depend upon the circumstances of the decision in question and should be proportionate.

11.4 A review of the available EIAs, as well as potential impacts identified by officers as efficiencies are developed, shows groups with the potential to be affected by multiple changes by efficiencies in the 2024/25 budget are:

- Older adults and their carers, adults of all ages who are disabled, are experiencing mental health difficulties or have learning disabilities and their carers.

- Children and young people, including those with special educational needs and disabilities (SEND), and their families.
- Surrey County Council Officers, particularly women, working in support services and those from lower-income or socio-economically disadvantaged households.

11.5 The budget overall will also have significant positive impacts, particularly where it focuses on expansion of some services, or changes to service that focus on prevention and early intervention. Despite the challenging financial climate facing the council, we will continue prioritising investment decisions that are targeted at supporting the most vulnerable of Surrey's residents, so no-one is left behind.

11.6 For any potential negative impacts, a summary of mitigating activity is provided in Annex I. These include measures focusing on ensuring engagement and consultation with service users and staff that will likely be impacted, as well as activity that prioritises early-intervention/ prevention approaches. We will also engage partner organisations when working to implement any efficiencies or planned activity where their support and insight in delivery will be useful.

8

	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m
a) Brought forward budget	1,208.4	1,264.1	1,298.9	1,341.2	1,391.4

Pressures

Directorate	Pressures					
	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	Total £m
Adults, Wellbeing & Health Partnerships	53.0	39.9	39.1	40.7	43.2	215.9
Children, Families & Lifelong Learning	31.7	14.0	13.6	14.5	14.7	88.5
Place	17.5	1.4	5.7	9.1	4.8	38.5
Community Protection & Emergencies	2.3	1.1	1.2	1.2	1.3	7.0
Resources	6.3	1.9	1.8	1.9	2.0	13.8
Central Income & Expenditure	11.3	14.3	6.4	5.9	3.5	41.4
b) Total Pressures	122.1	72.6	67.8	73.2	69.5	405.2

Efficiencies

Directorate	Efficiencies					
	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	Total £m
Adults, Wellbeing & Health Partnerships	(33.0)	(18.0)	(18.6)	(17.5)	(12.6)	(99.8)
Children, Families & Lifelong Learning	(12.6)	(13.0)	(6.1)	(5.1)	(1.3)	(38.1)
Place	(10.6)	(4.8)	(0.7)	(0.4)	(0.1)	(16.5)
Community Protection & Emergencies	(0.8)	(0.5)	0.0	0.0	0.0	(1.3)
Resources	(4.3)	(1.5)	(0.1)	0.0	0.0	(5.9)
Central Income & Expenditure	(5.0)	0.0	0.0	0.0	0.0	(5.0)
c) Total Efficiencies	(66.4)	(37.8)	(25.5)	(23.0)	(14.0)	(166.6)

| Indicative Budget Requirement (a + b - c) | 1,264.1 | 1,298.9 | 1,341.2 | 1,391.4 | 1,447.0 | 238.5 |

| d) Indicative funding increase / (reduction) | 55.7 | 7.0 | 0.7 | 2.3 | 1.3 | 66.9 |

| Remaining Gap (b - c - d) | 0.0 | 27.9 | 41.6 | 47.9 | 54.3 | 171.7 |

*Columns and rows may not sum throughout the annex due to the impact of minor rounding discrepancies

8

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 costed based on 6.8% 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. The cost of higher employer NI contributions is not included as there is insufficient funding to meet these costs. 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.	22.375	15.904	13.177	13.411	13.813	**78.679**
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 excluding increased employer National Insurance contributions	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**
Increased employer National Insurance contributions	The impact of increased employer National Insurance contributions from April 2025 for AWHP staff	1.906					**1.906**
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. Reflecting underachievement against the £1m workforce reconfiguration target set for 2024/25 due to workforce requirements to deliver statutory functions. 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**
Increase to Better Care Fund income for Adult Social Care	High level estimate of potential increased BCF income for ASC based on the trend in recent years prior to confirmation of BCF funding levels in 2025/26 by the Department of Health & Social Care	(3.000)					**(3.000)**
Changes to 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		**53.008**	**39.889**	**39.108**	**40.681**	**43.250**	**215.936**

Efficiencies

Efficiency	Description	Efficiency					Total £m	RAG Rating
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/39 £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)**	
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)**	
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)**	

Efficiency	Description	Efficiency					
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/39 £m	Total £m
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.	0.000	(0.026)	(0.256)	(0.506)	(0.530)	**(1.318)**
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)	0.000	0.000	**(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)	0.000	**(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.	(7.803)	0.000	0.000	0.000	0.000	**(7.803)**
Secure Section 117 Aftercare funding for out of county care packages	Securing income contributions from local NHS commissioners for people placed out of county under Section 117 Aftercare, where shared funding agreements for care package costs are not already in place.	(2.000)	0.000	0.000	0.000	0.000	**(2.000)**
Secure increased Section 117 Aftercare funding from Surrey ICBs	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)	0.000	0.000	0.000	0.000	**(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)	0.000	0.000	0.000	0.000	**(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)	0.000	0.000	0.000	0.000	**(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)	0.000	0.000	0.000	**(1.362)**
Senior leadership reorganisation	Reorganisation of Adult Social Care senior leadership posts	(0.434)	0.000	0.000	0.000	0.000	**(0.434)**
Workforce review	Review of AWHP workforce to identify and implement opportunities for efficiencies	(0.500)	(0.500)	0.000	0.000	0.000	**(1.000)**
Public Health staffing efficiencies	Maximise recharges of staff costs to external grants and manage vacancies within the available budget envelope	(0.100)	0.000	0.000	0.000	0.000	**(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)	0.000	0.000	0.000	0.000	**(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 demand for ASC and Children's services.	(0.500)	(0.528)	(0.041)	(0.043)	(0.044)	**(1.156)**
Total Efficiencies		**(33.044)**	**(17.977)**	**(18.609)**	**(17.524)**	**(12.602)**	**(99.756)**

CHILDREN, FAMILIES AND LIFELONG LEARNING

<u>**Pressures**</u>

Pressure	Description	Net Pressure					
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	Total £m
Pay inflation	Increase in staffing costs as per the corporately agreed pay award. Currently estimated at 3% in 25/26, 2% thereafter.	4.200	3.000	3.000	3.100	3.100	**16.400**
Pay Inflation - NI Impact	Increase in the NI Employer contribution from April 2025	2.500	0.000	0.100	0.000	0.100	**2.700**
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, funded with one off funding in 2023/24/ 24/25	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 - Demand	Additional Base Cost of External Placement Costs in 2024/25	2.100					**2.100**
Childrens Homes	Costs of Borrowing associated with Children's Homes capital investment	0.140	0.120	0.215	0.469	0.167	**1.111**
Children Looked After (CLA) Placements - inflation	Trajectory modelling of anticipated inflationary increases (+5% on current costs 25/26)	2.600	2.500	2.600	2.800	2.800	**13.300**
Home to School Travel Assistance - Demand	Trajectory modelling of anticipated demand increases	10.300	2.400	2.800	3.200	3.600	**22.300**
Home to School Travel Assistance - Inflation	Trajectory modelling of anticipated inflationary increases	2.000	1.500	1.300	1.300	1.300	**7.400**
Contract inflation	Assumed contract inflation costs	1.000	1.000	1.000	1.000	1.000	**5.000**
Bought forward unachieved stretch targets	Bought forward unachieved stretch targets less the additional funding allocation made in 2024/25	3.000					**3.000**
Bought forward unachievable twin track savings	24/25 share of the twin track contract savings	0.400					**0.400**
Recruitment and retention costs	Costs of introducing recruitment and retention bonuses and employment of overseas workforce to stabalise workforce	1.400	0.400				**1.800**
Total Pressures		**31.740**	**14.020**	**13.615**	**14.469**	**14.667**	**88.511**

Efficiencies

Efficiency	Description	Efficiency						RAG Rating
		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 stagffing reorganisation	(2.300)	(0.600)				**(2.900)**	
Home to School Travel Assistance	Full year effect of prior year efficiencies focused on route optimisation and reduction of solo vehicle use	(1.500)	(2.500)	(2.600)	(2.700)		**(9.300)**	
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)**	
Care 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)**	
Twin Track - Fees and charges	Work being driven by the Commercial Transformation Programme, to review Fees and Charges.	(0.600)	(0.300)	(0.300)			**(1.200)**	
Admin review	Review of all staff Admin costs in CFLL and Business support. This work is ongoing and is yet to be fully quantified.	(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 central provisions	(0.300)					**(0.300)**	
Short Breaks Review	To identify and benchmark against the available provision compared with other Local Authorities		(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		**(12.638)**	**(13.000)**	**(6.100)**	**(5.100)**	**(1.300)**	**(38.138)**	

PLACE

Pressures

Pressure	Description	Net Pressure					
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	Total £m
All - Pay Inflation	Expected inflationary increase in salary costs. Corporate assumption 3% 25/26, then 2%.	1.462	0.993	1.011	1.030	1.050	**5.546**
All - Non-Pay Inflation	Assumes 2% for contract inflation	2.328	2.791	2.855	2.920	2.987	**13.880**
All - National Insurance Contribution increases	Increased rate and reduced threshold	1.104	0.033	0.034	0.035	0.036	**1.243**
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 - 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. Adjusted to reflect use of BSIP grant for new Phase 3	5.782	2.669	1.024			**9.475**
H&T - concessionary fares	Impact of new national concessionary fares calculator and increasing demand	0.595					**0.595**
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 and Additional Digital Demand Responsive Transport	Estimated financial impact of retendering expiring local bus contracts, the expansion of Digital Demand Responsive Transport (DDRT) reflecting the adjusted timing of phase 3, and the half price travel scheme.	(3.657)	0.206	0.800	0.652	0.654	**(1.345)**
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)**
Environment - Waste Development Costs	One off development costs associated with Materials Recovery Facility (£1.9m), Slyfield recycling centre (£1.1m) and Doman Road transfer station (£0.6m), funded from Extended Producer Responsibility (EPR) grant.	3.600	(3.600)				**0.000**
Environment - Waste reprocurement Costs	Contract reprocuremet costs, funded from EPR grant.	0.900	0.400	(0.300)	(0.700)	(0.300)	**0.000**
Environment -Waste - Contribution to Capital Maintenance	Funded from EPR grant.	2.000	(2.000)				**0.000**
Environment - Doman Road	Temporary operational pressure during construction of new Doman Road transfer station, funded from EPR grant.			0.570	0.015	(0.585)	**0.000**
Environment -Waste Emissions Trading Scheme (ETS)	Estimated costs of the expansion of the ETS to household waste.				7.055		**7.055**
Environment - Waste - Bulky Waste Disposal Costs		0.100					**0.100**
Environment - Future requirements associated with EPR			4.200	(1.270)	(2.931)		**(0.000)**
Environment - Waste - EPR Grant	Grant funding offsets the above costs and the cost of managing packaging waste, and is expected to reduce over time.	(9.330)	1.000	1.000	1.000	1.000	**(5.330)**
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**
L&P - Business Rate Reform	Rate Increases		0.336				**0.336**
Total Pressures		**17.451**	**1.428**	**5.724**	**9.076**	**4.842**	**38.521**

Efficiencies

Efficiency	Description	Efficiency					Total £m	RAG Rating
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m		
Environment - Waste - Residual waste reprocurement	New contract has saved £4m per year. £0.6m part year impact assumed in 24/25, balance in 25/26.	(3.400)					**(3.400)**	🟩
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 - Dry Mixed Recyclables	Estimate of saving expected from the reprocurement of DMR, contract goes live October '24.	(0.100)					**(0.100)**	🟧
Environment - Waste - Green waste contract re-price	Lower gate fee secured through contract extension with existing provider	(0.300)					**(0.300)**	🟩
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	(0.020)					**(0.020)**	🟧
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 - 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 Electric Vehicle 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 - Parking	Increase income from parking		(0.200)	(0.200)			**(0.400)**	🟧
H&T - Feet First Programme	Seek alternative funding to enable the service to work at full cost recovery.		(0.112)				**(0.112)**	🟥
H&T - Cycle Training Programme	Seek alternative funding to enable the service to work at full cost recovery.		(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)**	🟧

Efficiency	Description	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	Total £m	RAG Rating
Land & Property - Scale of Operational Estate Land & Property - Challenge need for Retained Properties Land & Property - Challenge unit costs for Operational Estate	To reduce the scale of the operational estate, and seek to close buildings more aggressively. Work with Services to progress decisions on buildings that are currently flagged as a strategic hold (to decrease running costs across the portfolio) Review all building costs and work with Macro on all Soft & Hard FM Costs		(0.737)				(0.737)	
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 agile programme 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 the sale of services and other income generating activities across the Planning Group.	(0.100)					(0.100)	
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	(0.018)	(0.059)	(0.092)	(0.125)	(0.059)	(0.353)	
Economic Development - Restructure - 'rightsize team'	Review of Economic Development team.	(0.085)					(0.085)	
Income generation	Placeholder for future income reviews.		(0.200)	(0.200)	(0.200)		(0.600)	
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)	
All - further efficiencies from Place redesign and other measures	Reshaping EIG Phase 3	(0.190)	(0.580)				(0.770)	
Realignment of Vacancy Factor across Place		(0.303)					(0.303)	
Total Efficiencies		**(10.592)**	**(4.827)**	**(0.656)**	**(0.350)**	**(0.059)**	**(16.484)**	

COMMUNITY PROTECTION & EMERGENCIES

<u>**Pressures**</u>

Pressure	Description	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	Total £m
				Net Pressure			
Pay inflation Total		1.446	1.018	0.947	0.965	0.984	**5.360**
Non-Pay inflation Total		0.201	0.205	0.209	0.213	0.254	**1.083**
NIC Increase		0.956	0.029	0.030	0.030	0.031	**1.076**
Fire - Airwave communications system	Grant has 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 retender	(0.067)	(0.067)				**(0.134)**
Total Pressures		**2.301**	**1.065**	**1.185**	**1.209**	**1.269**	**7.029**

Efficiencies

Efficiency	Description	Efficiency 2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	Total £m	RAG Rating
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 - Logistics - review of Staff, Property and Non Capital Assets	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	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.	(0.306)	(0.148)				**(0.454)**	
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, reflecting the time spent to recruit to vacant post.	(0.136)					**(0.136)**	
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		**(0.837)**	**(0.498)**	**0.000**	**0.000**	**0.000**	**(1.335)**	

RESOURCES

Pressures

Pressure	Description	Net Pressure					
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	Total £m
Pay Inflation	Pay inflation 3% 2025/26 and 2% thereafter	3.313	1.802	1.837	1.872	1.909	**10.734**
Non-pay inflation	Non pay inflation 2%	0.569	0.639	0.651	0.665	0.678	**3.202**
Income inflation	Income inflation 2%	(0.637)	(0.600)	(0.612)	(0.624)	(0.636)	**(3.109)**
National Insurance	National Insurance increase	1.940	0.039	0.040	0.040	0.041	**2.100**
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**
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.		0.150				**0.150**
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**
Funding changes	Fleet Management Team	0.200					**0.200**
Total Pressures		**6.261**	**1.905**	**1.791**	**1.853**	**1.992**	**13.803**

Efficiencies

Efficiency	Description	Efficiency					Total £m	RAG Rating
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m		
Organisation Redesign and Customer Transformation	Review of staffing across services, through streamlining, removing duplication and using technology.	(1.000)	(0.533)	(0.140)			**(1.673)**	🟧
Organisation Redesign efficiencies	Staffing reductions from review of Finance, Leadership Office and Legal	(0.791)	(0.500)				**(1.291)**	🟧
Organisation Redesign efficiencies	Staffing reductions from review of posts in Leadership Office, Corporate Strategy & Policy and following CLT re-structure	(0.715)					**(0.715)**	🟩
Staffing reductions	Review of staffing across services, through redesign and distribution.	(0.308)	(0.185)				**(0.493)**	🟩
IT&D efficiencies	Wide area network contract reductions	(0.300)					**(0.300)**	🟩
Income Strategy	Maximising Income	(0.291)					**(0.291)**	🟧
Twelve15 review	Maximising income through rate increases and reducing staffing costs	(0.250)					**(0.250)**	🟩
Council wide mobile phone efficiencies	Reduction in use of mobile phones across the Council	(0.250)					**(0.250)**	🟧
Core Welfare offer	Maximise external grants to fund the welfare offer	(0.240)					**(0.240)**	🟧
Legal Services	Reduction in expenditure of advocacy	(0.114)					**(0.114)**	🟩
IT&D licence reduction	Reduced IT&D licence costs due to staffing changes	(0.113)	(0.227)				**(0.340)**	🟥
Targeted reductions	Variety of measures to reduce spend	(0.100)					**(0.100)**	🟩
Communications - publications	Removal of annual all-residents mailer and reduction in communications campaign spend and advertising costs	(0.090)					**(0.090)**	🟩
Core Heritage service	Service review of Archaeological services	(0.067)					**(0.067)**	🟥
Surrey Arts efficiency	Remove subsidy of non targeted music tuition	(0.053)	(0.027)				**(0.080)**	🟧
Procurement efficiencies	Woodhatch bus service	(0.050)					**(0.050)**	🟩
Reduced Trade Union Posts	Reduce the current budget for trade union roles in line with 2024/25 levels	(0.048)					**(0.048)**	🟩
Corporate Subscriptions	Remove New Local subscription	(0.015)					**(0.015)**	🟩
Previous years efficiencies	Remove unachievable 2023/24 & 2024/25 efficiencies	0.398					**0.398**	🟩
People & Change professional and transactional services	Previous years unachievable efficiencies and reduced income from transactional services	0.109					**0.109**	🟧
Total Efficiencies		**(4.288)**	**(1.472)**	**(0.140)**	**0.000**	**0.000**	**(5.900)**	

CENTRAL INCOME AND EXPENDITURE

Pressures

Pressure	Description	Net Pressure					
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	Total £m
Capital Financing Costs	MRP & Interest Payable Costs	10.400	9.200	6.300	5.800	3.400	**35.100**
Non-Pay Inflation		0.300	0.100	0.100	0.100	0.100	**0.700**
Commissioning Provision	For evidenced pressures above budget in the Council's supply chain	8.000					**8.000**
National Insurance Compensation Funding	Estimated compensation funding from Government	(6.400)					**(6.400)**
Unachievable Efficiencies	Prior Year unachievable Efficiencies	4.000					**4.000**
Planned Contribution from Reserve	One-of funding for additional Verge Maintenance	(5.000)	5.000				**0.000**
Total Pressures		**11.300**	**14.300**	**6.400**	**5.900**	**3.500**	**41.400**

Efficiencies

Description		Efficiency						RAG Rating
		2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	Total £m	
Reduction in Transformation Costs	County-wide review of Transformation costs	(1.500)					**(1.500)**	
Organisational Re-design	Additional Organisational Redesign Target	(3.500)					**(3.500)**	
Total Efficiencies		**(5.000)**	**0.000**	**0.000**	**0.000**	**0.000**	**(5.000)**	

Our Council

2025/26 Subjective Budget

2024/25 Restated Budget £m	Directorate	Employee Cost £m	Non Employee Cost £m	Gross Exp £m	Income £m	Government Grants £m	2025/26 Draft Budget £m
505.9	Adults, Wellbeing & Health Partnerships	101.6	637.1	738.6	(172.5)	(40.1)	526.0
291.6	Children, Families and Lifelong Learning	160.2	584.9	745.1	(27.0)	(404.1)	314.1
187.4	Place	48.7	196.4	245.2	(30.5)	(17.4)	197.3
43.9	Community Protection & Emergencies	49.1	8.7	57.8	(5.6)	(6.6)	45.6
79.0	Resources	85.1	41.3	126.4	(41.6)	(4.3)	80.5
100.6	Central Income & Expenditure	8.0	120.6	128.6	(21.5)	(6.4)	100.7
1,208.4	**Total - Our Council**	**452.7**	**1,589.0**	**2,041.7**	**(298.7)**	**(478.9)**	**1,264.1**
	Central funding:						
(921.1)	Council tax				(977.7)		(977.7)
(152.1)	Business Rates				(116.1)	(32.2)	(148.3)
(135.2)	Central Government Grants					(138.1)	(138.1)
(0.0)	**Total - Our Council**	**452.7**	**1,589.0**	**2,041.7**	**(1,392.6)**	**(649.2)**	**0.0**

Budget movements from 2024/25 Budget to 2025/26 Budget

2024/25 Restated Budget £m	Directorate	2024/25 Virements and Other Adjustments £m	2024/25 Budget £m	Inflation £m	Pressures & funding changes £m	Efficiencies £m	2025/26 Draft Budget £m
505.9	Adults, Wellbeing & Health Partnerships	0.1	506.0	25.1	27.9	(33.0)	526.0
291.6	Children, Families and Lifelong Learning	3.3	294.9	12.3	19.4	(12.6)	314.1
187.4	Place	3.1	190.5	3.8	13.7	(10.6)	197.3
43.9	Community Protection & Emergencies	0.2	44.1	2.5	(0.2)	(0.8)	45.6
79.0	Resources	(0.5)	78.5	3.3	3.0	(4.3)	80.5
100.6	Central Income & Expenditure	(6.2)	94.4	8.3	3.0	(5.0)	100.7
1,208.4	**Total - Our Council**	**(0.0)**	**1,208.4**	**55.2**	**66.8**	**(66.4)**	**1,264.1**
(1,208.4)	Overall funding		(1,208.4)	0.0	(55.7)	0.0	(1,264.1)
(0.0)	**Total - Our Council**	**(0.0)**	**(0.0)**	**55.2**	**11.1**	**(66.4)**	**(0.0)**

Adults, Wellbeing & Health Partnerships

Executive Director:
Claire Edgar

2025/26 Subjective Budget

2024/25 Restated Budget £m	Service	Employee Cost £m	Non Employee Cost £m	Gross Exp £m	Income £m	Government Grants £m	2025/26 Draft Budget £m
36.8	Public Health	5.3	36.7	42.0	(1.1)	(3.5)	37.4
3.0	Communities & Prevention	2.9	5.6	8.5	(0.1)	(4.7)	3.711
466.2	Adult Social Care	93.4	594.8	688.2	(171.3)	(31.9)	484.9
505.9	**Total - Adults, Wellbeing & Health Partnerships**	**101.6**	**637.1**	**738.6**	**(172.5)**	**(40.1)**	**526.0**

Budget movements from 2024/25 Budget to 2025/26 Budget

2024/25 Restated Budget £m	Service	2024/25 Virements and Other Adjustments £m	2024/25 Budget £m	Inflation £m	Pressures £m	Efficiencies £m	2025/26 Draft Budget £m
36.8	Public Health	0.0	36.8	0.9		(0.3)	37.4
3.0	Communities & Prevention	0.1	3.1	0.2	1.0	(0.5)	3.711
466.2	Adult Social Care	0.0	466.2	24.0	26.9	(32.3)	484.9
505.9	**Total - Adults, Wellbeing & Health Partnerships**	**0.1**	**506.0**	**25.1**	**27.9**	**(33.0)**	**526.0**

Children, Families and Lifelong Learning

Executive Director:
Rachael Wardell

2025/26 Subjective Budget

2024/25 Restated Budget £m	Service	Employee Cost £m	Non Employee Cost £m	Gross Exp £m	Income £m	Government Grants £m	2025/26 Draft Budget £m
66.8	Family Resilience	48.8	27.3	76.1	-2.6	-4.6	68.8
26.3	Education and Lifelong Learning	44.5	244.2	288.7	-13.9	-247.7	27.1
86.5	Quality Assurance	26.7	76.9	103.6	-4.6	-1.0	98.1
111.8	Corporate Parenting	38.0	98.6	136.5	-5.3	-15.9	115.3
1.9	Commissioning	3.6	134.5	138.1	-0.5	-134.8	2.8
(1.7)	Exec Directorator central budget	-1.3	3.4	2.0	0.0	0.0	2.0
291.6	**Total - Children, Families and Lifelong Learning**	**160.2**	**584.9**	**745.1**	**(27.0)**	**(404.1)**	**314.1**
0.0	Delegated Schools						
291.6	**Total - Children, Families and Lifelong Learning**	**160.2**	**584.9**	**745.1**	**(27.0)**	**(404.1)**	**314.1**

Budget movements from 2024/25 Budget to 2025/26 Budget

2024/25 Restated Budget £m	Service	2024/25 Virements and Other Adjustments £m	2024/25 Budget £m	Inflation £m	Pressures £m	Efficiencies £m	2025/26 Draft Budget £m
66.8	Family Resilience	0.0	66.8	2.2	1.8	-2.0	68.8
26.3	Education and Lifelong Learning	0.7	26.9	1.0	0.0	-0.8	27.1
86.5	Quality & Performance	0.2	86.9	3.5	10.3	-2.6	98.1
111.8	Corporate Parenting	0.1	111.8	4.4	3.9	-4.9	115.3
1.9	Commissioning	0.3	2.2	0.2	0.4	0.0	2.8
(1.7)	Exec Director central budget	2.0	0.4	1.0	3.0	-2.4	2.0
291.6	Total - Children, Learning, Families and Culture	3.3	295.0	12.3	19.4	-12.6	314.1
0.0	Delegated Schools						
291.6	**Total - Children, Families and Lifelong Learning**	**3.3**	**295.0**	**12.3**	**19.4**	**(12.6)**	**314.1**

Community Protection & Emergencies

Chief Fire Officer: Dan Quin

2025/26 Subjective Budget

2024/25 Restated Budget £m	Service	Employee Cost £m	Non Employee Cost £m	Gross Exp £m	Income £m	Government Grants £m	2025/26 Draft Budget £m
40.4	Fire and Rescue	43.8	5.4	49.3	(2.8)	(4.6)	41.8
1.8	Trading Standards	3.7	0.3	4.0	(2.1)	0.0	1.9
1.0	Safer Communities	0.8	3.0	3.7	(0.6)	(2.0)	1.1
0.7	Emergency Management	0.8	0.0	0.9	(0.1)	0.0	0.7
43.9	**Total - Community Protection & Emergencies**	**49.1**	**8.7**	**57.8**	**(5.6)**	**(6.6)**	**45.6**

Budget movements from 2024/25 Budget to 2025/26 Budget

2024/25 Restated Budget £m	Service	2024/25 Virements and Other Adjustments £m	2024/25 Budget £m	Inflation £m	Pressures £m	Efficiencies £m	2025/26 Draft Budget £m
40.4	Fire and Rescue	0.0	40.4	2.4	(0.3)	(0.7)	41.8
1.8	Trading Standards	0.0	1.8	0.1	0.1	(0.1)	1.9
1.0	Safer Communities	0.2	1.2	0.0	0.0	(0.1)	1.1
0.7	Emergency Management	0.0	0.7	0.0	0.0	(0.1)	0.7
43.9	**Total - Community Protection & Emergencies**	**0.2**	**44.1**	**2.5**	**(0.2)**	**(0.8)**	**45.6**

Place

Executive Director:
Simon Crowther/Owen Jenkins

2025/26 Subjective Budget

2024/25 Restated Budget £m	Service	Employee Cost £m	Non Employee Cost £m	Gross Exp £m	Income £m	Government Grants £m	2025/26 Draft Budget £m
73.6	Highways & Transport	22.3	83.5	105.8	(17.2)	(7.7)	80.9
82.8	Environment	7.8	87.6	95.4	(2.2)	(9.7)	83.5
2.6	Infrastructure Planning & Major Projects	7.0	(1.0)	5.9	(3.0)		2.9
23.8	Land & Property	8.2	25.9	34.1	(8.1)	0.0	26.0
1.2	Economic Growth	1.0	0.2	1.2	0.0	0.0	1.2
3.4	Planning Performance & Support (incl Cross Cutting Efficiencies)	2.5	0.3	2.8	(0.0)		2.8
187.4	**Total - Place**	**48.7**	**196.4**	**245.2**	**(30.5)**	**(17.4)**	**197.3**

Budget movements from 2024/25 Budget to 2025/26 Budget

2024/25 Restated Budget £m	Service	2024/25 Virements and Other Adjustments £m	2024/25 Budget £m	Inflation £m	Pressures £m	Efficiencies £m	2025/26 Draft Budget £m
73.6	Highways & Transport	2.6	76.2	1.2	9.3	(5.8)	80.9
82.8	Environment	0.0	82.8	1.6	3.7	(4.5)	83.5
2.6	Infrastructure Planning & Major Projects	0.3	2.9	0.2	0.2	(0.3)	2.9
23.8	Land & Property	0.2	24.0	0.74	0.1	1.2	26.0
1.2	Economic Growth	0.0	1.2	0.0	0.0	(0.1)	1.2
3.4	Planning Performance & Support (incl Cross Cutting Efficiencies)	(0.0)	3.3	0.1	0.4	(1.0)	2.8
187.400	**Total - Place**	**3.1**	**190.5**	**3.8**	**13.7**	**(10.6)**	**197.3**

Resources

Executive Director: Andy Brown

2025/26 Subjective Budget

2024/25 Restated Budget £m	Service	Employee Cost £m	Non Employee Cost £m	Gross Exp £m	Income £m	Government Grants £m	2025/26 Draft Budget £m
0.7	Resources Leadership	1.1	(0.1)	1.0	-	-	1.0
15.1	Customer and Transformation	23.4	7.1	30.5	(10.7)	(4.3)	15.5
9.0	Finance	7.0	4.4	11.3	(2.2)	-	9.1
2.8	Communications	3.0	(0.1)	2.9	(0.2)	-	2.7
3.1	Corporate Strategy & Policy and Leadership Office	3.0	0.3	3.3	-	-	3.3
6.4	Orbis & SCC Procurement	0.6	6.3	7.0	-	-	7.0
21.4	Information Technology & Digital	12.1	9.6	21.6	(0.5)	-	21.2
10.1	Legal & Governance	8.8	1.9	10.7	(0.3)	(0.1)	10.4
9.3	People & Change	8.4	1.3	9.7	(0.4)	-	9.3
2.9	Design and Transformation	1.6	0.5	2.1	-	-	2.1
(1.7)	Pensions & Twelve15	16.0	10.2	26.2	(27.3)	-	(1.2)
79.0	**Total - Resources**	**85.1**	**41.3**	**126.4**	**(41.6)**	**(4.3)**	**80.5**

Resources: Budget movements from 2024/25 Budget to 2025/26 Budget

2024/25 Restated Budget £m	Service	2024/25 Virements and Other Adjustments £m	2024/25 Budget £m	Inflation £m	Pressures £m	Efficiencies £m	2025/26 Draft Budget £m
0.7	Resources Leadership	(0.1)	0.7	0.3	0.0	(0.0)	1.0
15.1	Customer and Transformation	0.1	15.1	0.8	0.5	(0.9)	15.5
9.0	Finance	0.2	9.2	0.2	0.2	(0.5)	9.1
2.8	Communications	0.0	2.8	0.1	0.1	(0.2)	2.7
3.1	Corporate Strategy & Policy and Leadership Office	0.5	3.6	0.1	0.1	(0.5)	3.3
6.4	Orbis & SCC Procurement	(0.2)	6.2	0.4	0.3	0.1	7.0
21.4	Information Technology & Digital	(0.2)	21.1	0.3	0.9	(1.2)	21.2
10.1	Legal & Governance	0.0	10.1	0.3	0.2	(0.3)	10.4
9.3	People & Change	(0.3)	9.0	0.2	0.3	(0.2)	9.3
2.9	Design and Transformation	(0.5)	2.4	0.1	0.1	(0.4)	2.1
(1.7)	Pensions & Twelve15	0.0	(1.7)	0.4	0.4	(0.3)	(1.2)
79.0	**Total - Resources**	**(0.5)**	**78.5**	**3.3**	**3.0**	**(4.3)**	**80.5**

Central Income & Expenditure (CIE)

Executive Director: Andy Brown

2025/26 Subjective Budget

2024/25 Restated Budget £m	Service	Employee Cost £m	Non Employee Cost £m	Gross Exp £m	Income £m	Government Grants £m	2025/26 Draft Budget £m
6.6	Redundancy & Compensation		6.6	6.6			6.6
0.6	Corporate Charges & Levies	1.5	10.5	12.0			12.0
13.0	Transformation		24.6	24.6			24.6
0.0	Contribution from Transformation Reserve		(13.1)	(13.1)			(13.1)
5.0	Feasibility Fund		5.0	5.0			5.0
10.0	Pension Secondary Contribution	10.0		10.0			10.0
29.7	Interest Payable		35.3	35.3			35.3
31.9	Minimum Revenue Provision		36.7	36.7			36.7
(21.5)	Interest Receivable & Investment Income		0.0	0.0	(21.5)		(21.5)
20.0	Budgeted Contribution to Reserves		20.0	20.0			20.0
5.9	Additional Funding to be allocated		0.0	0.0			0.0
(0.6)	Contribution from Reserves		(5.0)	(5.0)			(5.0)
0.0	Assumed Compensation Funding for NIC increase		0.0	0.0		(6.4)	(6.4)
0.0	Additional Organisational Redesign Efficiency	(3.5)	0.0	(3.5)			(3.5)
100.6	**Total - Central Income & Expenditure (CIE)**	**8.0**	**120.6**	**128.6**	**(21.5)**	**(6.4)**	**100.7**

Executive Director: Andy Brown

CIE Budget movements from 2024/25 Budget to 2025/26 Budget

2024/25 Restated Budget £m	Service	2024/25 Virements and Other Adjustments £m	2024/25 Budget £m	Inflation £m	Pressures £m	Efficiencies £m	2025/26 Draft Budget £m
6.6	Redundancy & Compensation		6.6				6.6
0.6	Corporate Charges & Levies	(0.3)	0.3	8.3	3.4		12.0
13.0	Transformation		13.0		13.1	(1.5)	24.6
0.0	Contribution from Transformation Reserve		0.0		(13.1)		(13.1)
5.0	Feasibility Fund		5.0				5.0
10.0	Pension Secondary Contribution		10.0				10.0
29.7	Interest Payable		29.7		5.6		35.3
31.9	Minimum Revenue Provision		31.9		4.8		36.7
(21.5)	Interest Receivable & Investment Income		(21.5)				(21.5)
20.0	Budgeted Contribution to Reserves		20.0				20.0
5.9	Additional Funding to be allocated	(5.9)	0.0				0.0
(0.6)	Contribution from Reserves		(0.6)		(4.4)		(5.0)
0.0	Assumed Compensation Funding for NIC increase		0.0		(6.4)		(6.4)
0.0	Additional Organisational Redesign Efficiency		0.0			(3.5)	(3.5)
100.6	**Total - Central Income & Expenditure (CIE)**	**(6.2)**	**94.4**	**8.3**	**3.0**	**(5.0)**	**100.7**

This page is intentionally left blank

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	3.2	2.8	2.8	2.8	0.8	**12.5**
External funding	1.2	1.2	1.2	1.2	1.2	**6.0**
Flooding & drainage	2.4	2.4	2.4	2.4	1.4	**11.0**
Highway Maintenance - Core Programme	35.5	35.5	35.5	35.5	35.5	**177.5**
Highway Maintenance - Enhanced Programme	30.0	30.0	-	-	-	**60.0**
Highway Maintenance - Signs	0.3	0.3	0.3	0.3	0.3	**1.3**
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	0.3	0.3	0.3	0.1	**1.1**
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	0.6	0.6	0.6	0.6	0.1	**2.5**
Surrey Quality Bus Corridor Improvement	0.1	0.1	-	-	-	**0.2**
Task & Finish - flooding & drainage	0.8	0.8	0.8	0.8	0.8	**3.8**
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 - RTPI for buses	0.3	0.3	0.3	-	-	**0.9**
County Model (new Transport Studies)	0.7	-	-	-	-	**0.7**
Highways and Transport	**115.4**	**96.0**	**61.7**	**59.4**	**55.2**	**387.7**
A320 North of Woking and Junction 11 of M25	21.0	5.0	-	-	-	**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 - Shelvers 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	**38.2**	**6.7**	**-**	**-**	**-**	**44.9**
Basingstoke Canal recurring capital maitenance	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**
Treescapes 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	3.7	5.2	2.5	3.0	0.5	**15.0**
Trading Standards Replacement Vehicles	0.1	-	-	-	-	**0.1**
Surrey Fire & Rescue Service	**6.3**	**7.7**	**5.0**	**3.4**	**0.9**	**23.2**
INFRASTRUCTURE	**166.6**	**118.2**	**73.8**	**68.1**	**60.8**	**487.5**

8

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)	35.1	38.3	25.0	12.1	-	110.5
Sunbury Hub	7.6	7.0	3.0	-	-	17.6
Alternative Provision Strategy (SEND)	10.7	14.5	15.0	-	-	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	4.1	1.1	-	-	-	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	4.6	5.0	4.0	-	-	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	0.5	2.3	2.8	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	**166.9**	**146.1**	**101.9**	**49.9**	**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	**170.3**	**149.2**	**105.0**	**53.0**	**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**
Brightwells	4.2	0.2	-	-	-	4.4
Commercial	**4.2**	**0.2**	**-**	**-**	**-**	**4.4**
TOTAL BUDGET	**344.0**	**270.8**	**179.8**	**124.9**	**97.4**	**1,016.8**

PIPELINE						
Pipeline	52.3	84.0	68.5	67.1	100.1	372.0
Your Fund Surrey	10.0	-	-	-	-	10.0
TOTAL PIPELINE	**62.3**	**84.0**	**68.5**	**67.1**	**100.1**	**382.0**

TOTAL CAPITAL PROGRAMME	**406.3**	**354.8**	**248.2**	**192.0**	**197.5**	**1,398.8**

Capital Programme - Financing 2025/26 to 2029/30

Funding Source	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m	Total £m
Grants	99.9	103.0	74.1	102.0	146.0	525.0
External Contributions	27.5	13.0	10.5	7.3	4.4	62.7
Revenue	1.0	0.9	0.7	0.7	0.7	4.0
Self Financing Borrowing	49.3	35.8	34.2	13.3	1.5	134.2
Capital Receipts	31.8	26.4	10.8	8.4	8.4	85.8
Borrowing	196.8	175.6	117.8	60.2	36.6	587.1
TOTAL FUNDING	**406.2**	**354.8**	**248.2**	**191.9**	**197.7**	**1,398.8**

Projected Earmarked Reserves and Balances 31 March 2025

As part of the 2025/26 budget planning process, a thorough review and repositioning of all earmarked reserves has been undertaken. A number of historic reserves are proposed to be re-purposed for current and future commitments and to align Cabinet approvals for the use of reserves for specific items of expenditure.

Following this review, reserve balances available to provide financial resilience against unforeseen events stands at £70.9m. Taken alongside the forecast General Fund position, this results in £121.4m, or 10% of the 2025/26 net revenue budget, of cover to mitigate against future risk and uncertainties.

The following assumptions should be noted:

- The Earmarked Reserves position presented below reflects the estimated closing balance for 2024/25 and hence the total reserves available for the financial year 2025/26.

- The forecast increase in the General Fund Balance reflects the current budget position for 2024/25, which requires the utilisation of £18.6m of the risk contingency budget. This would leave £1.4m remaining to contribute to increasing the General Fund Balance.

- The increase in the Transformation Reserve, reflects the approval of the following programmes to be funded via transformation over the coming years:

	25/26 £m	26/27 £m	27/28 £m	Total £m
- Transformation Reserve opening balance	2.9			**2.9**
- Adults, Wellbeing & Health Partnerships	3.8	0.5	0.0	**4.3**
- Customer Transformation	3.6	3.1	0.2	**6.9**
- Data Team	1.0			**1.0**
- EHCP Timeliness	2.5			**2.5**
	13.8	**3.6**	**0.2**	**17.6**

- The DSG High Needs Block Deficit position is net of DfE Safety Vave contributions and schools block transfer

- Current legislation requires us to account for the DSG deficit as an unusable reserve, so our statement of accounts records this separately and therefore shows a higher reserves balance of £427.8m at 31/3/24. For budgeting purposes, it is more prudent to show the deficit alongside the offset.

- Explanations of the purposes each reserve is held for is included in the Appendix to this Annex.

	Opening Balance	Forecast Use	Forecast Closing Balance	Re-set	Revised Balance	Balance to count towards financial resilience	Forecast Use	Forecast Closing Balance	Balance to count towards financial resilience
	01-Apr-24 £m	2024/25 £m	31-Mar-25 £m	2025/26 £m	31-Mar-25 £m	£m	2025/26 £m	31-Mar-26 £m	£m
Earmarked Reserves									
Budget Equalisation Reserve:									
- Local Tax Support/Empty Properties	5.9	-1.0	4.9		**4.9**		-2.0	**2.9**	
- Agile Office	3.6	-2.8	0.8		**0.8**		-0.8	**0.0**	
- Election Costs	-0.2	0.4	0.2	1.8	**2.1**		-2.1	**0.0**	
- Workforce Innovation & Mental Health Improvement	11.9	-7.6	4.3		**4.3**		-3.7	**0.6**	
- Prior Year c/fs	1.2	-0.4	0.8		**0.8**		-0.4	**0.4**	
- Prior Year Commitments	12.1		12.1	-12.1	**0.0**			**0.0**	
- Additional verge maintenance				5.0	**5.0**		-5.0	**0.0**	
- Collection Fund volatility					**0.0**		8.0	**8.0**	8.0
- MySurrey Stabilisation/Optimisation				1.3	**1.3**		-1.3	**0.0**	
- Financial Resilience Reserve	39.7		39.7	18.2	**57.9**	57.9	20.0	**77.9**	77.9
Total Budget Equalisation Reserve	74.3	-11.5	62.8	14.1	**76.9**	57.9	12.8	**89.8**	85.9
Economic Prosperity	11.7		11.7	-11.7	**0.0**			**0.0**	
Revolving Investment & Infrastructure Fund	11.1	-3.1	8.0		**8.0**	8.0		**8.0**	8.0
Business Rate Appeals	28.6		28.6	-28.6	**0.0**			**0.0**	
CFLC Inspection and System Improvements	0.1	-0.1	0.0		**0.0**			**0.0**	
Transformation*	0.8	2.1	2.9	14.7	**17.6**		-13.8	**3.8**	
Investment Renewals	5.0	-5.0	0.0		**0.0**			**0.0**	
Equipment Replacement	1.8	-0.6	1.2		**1.2**		-0.2	**1**	
Insurance	8.6	-0.5	8.1		**8.1**		-0.5	**7.6**	
Eco Park Sinking Fund	19.5		19.5		**19.5**			**19.5**	
Capital Investment	5.4	-0.3	5.1		**5.1**	5.1		**5.1**	5.1
Interest Rate	1.6	-8.1	-6.5	6.5	**0.0**			**0.0**	
Local Government Reform	0.0		0.0	5.0	**5.0**		-5.0	**0.0**	
Total Earmarked Reserves	**168.5**	**-27.1**	**141.4**	**0.0**	**141.4**	**70.9**	**-6.7**	**134.8**	**98.9**
Schools Balances	52.1	-7.1	45.0		**45.0**		-10.0	**35.0**	
DSG High Needs Block Deficit	-79.5	-57.0	-136.5		**-136.5**		-31.0	**-167.5**	
DSG High Needs Block Offset	144.0		144.0		**144.0**		0.0	**144.0**	
SEND & Schools Balances	**116.6**	**-64.1**	**52.5**	**0.0**	**52.5**	**0.0**	**-41.0**	**11.5**	**0.0**
Revenue Grants Unapplied	63.2		63.2		**63.2**			**63.2**	
Total Earmarked Reserves	**348.3**	**-91.2**	**257.1**	**0.0**	**257.1**	**70.9**	**0.0**	**63.2**	**0.0**
General Fund Balance	**49.1**	**1.4**	**50.5**	**0.0**	**50.5**	**50.5**	**0.0**	**50.5**	**50.5**
Overall Total	**397.4**	**-89.8**	**307.6**	**0.0**	**307.6**	**121.4**	**-47.7**	**260.0**	**149.4**
% of Net Revenue Budget						10%			12%

Appendix 1:

The Council holds reserves for various purposes, as set out below:

i) **Budget Equalisation Reserve:** This reserve was set up to support future years' revenue budgets from unapplied income, budget carry forwards and prior years' unutilised corporate contingency budgets. It provides overall financial resilience and the ability to 'smooth' one off financial impact. The table above, breaks the Budget Equalisation Reserve down into its component parts, showing the elements ringfenced for specific purposes and the amount available to protect against future uncertainty and provide financial resilience.

ii) **Revolving Investment & Infrastructure Fund:** This Fund was established in order to provide for the revenue costs of funding infrastructure and investment initiatives that will deliver efficiencies and enhance income in the longer-term. It is also earmarked to cover the risk of potential short-term decreases in investment income from investment properties and/or the Council's subsidiary companies.

iii) **Transformation Reserve:** This was established to pump-prime projects that required upfront expenditure to deliver service re-design, transformation and deliver future financial efficiencies.

iv) **Equipment Replacement Reserve:** Enables services to set aside revenue budgets to meet future replacement costs of large equipment items. Services make annual revenue contributions to the reserve and make withdrawals to fund purchases. This reserve is being phased out over the medium-term to ensure consistency in the application of revenue funds for capital across the Council.

v) **Insurance Reserve:** This reserve holds the balance resulting from a temporary surplus or deficit on the Council's self-insurance fund and is assessed by an actuary for the possible liabilities the Council may face. It specifically holds £4.2m to cover potential losses from the financial failure of Municipal Mutual Insurance (MMI) in 1992. The company had limited funds to meet its liabilities, consequently, future claims against policy years covered by MMI may not be fully paid, so would be funded from this reserve. The balance on this reserve represents the latest assessed possible liability.

vi) **Eco Park Sinking Fund:** To smooth the impact of the compressed distribution of the contract costs and re-profiling of the PFI credits.

vii) **Capital Investment Reserve:** To fund revenue costs to pump-prime capital investment.

viii) **Local Government Reform:** This is a new reserve set up to cover the initial costs associated with implementing potential Local Government Reform in Surrey.

ix) **DSG & Schools Balances:** This represents unapplied revenue resources accumulated by maintained schools with delegated spending authority. The balance is controlled by schools and is not available to the Council for other purposes. The reserve has also been set aside to fund the deficit on the DSG High Needs Block, in the event that it has to be resourced by the Council.

x) **Revenue Grants Unapplied:** This reserve holds grants from central government which have been held in reserve as expenditure in relation to the grant has yet to be incurred.

This page is intentionally left blank

Annex E

<div align="center">

Council Tax Requirement

</div>

1. In January 2025, the District and Borough Councils informed Surrey County Council of the Council Tax base for 2025/26. The tax base provided is presented as the number of Band D equivalent properties. The total tax base for 2025/26 is 526,600.7; an increase of 1.22% from 2024/25.

2. At the same time, the District and Borough Councils provided estimates of the Council Tax Collection Fund balance, the 2025/26 surplus is £13.5m. Volatility in future collection fund figures is exacerbated by economic uncertainty and increased cost of living which could impact collection rates. The Council therefore takes a prudent approach, making a transfer to reserves where forecasts are unusual, as there is a high possibility of a correction next financial year. There is a proposed transfer of £8m for 2025/26.

3. Each year the Council must decide if its proposed Council Tax increase is excessive. If deemed excessive, a referendum must be held. This decision must be made in accordance with a set of principles determined by the Secretary of State (SoS), referred to as the referendum principle.

4. Since 2016/17, authorities with social care responsibilities have been allowed additional flexibility on their core Council Tax referendum principle so long as the additional money raised is used entirely for adult social care services. This is referred to as the Adult Social Care (ASC) precept.

5. On 18 December 2024, as part of the Provisional Local Government Finance Settlement, Government laid out the referendums relating to council tax increases for 2025/26. They stated that county councils can increase core council tax by up to 3% without the need for a referendum and can raise 2% in an additional adult social care precept.

6. Increases in the core Council Tax and ASC precept are calculated based on the full Council Tax precept for the preceding year.

7. Council is asked to approve the increase to core Council Tax by 2.99% and the ASC precept by 2%; an overall increase of 4.99%, for 2025/26. The Council Tax precept is the Council Tax requirement divided by the tax base.

Table 1 – Council Tax Requirement

(Income)/Expenditure	2025/26 £
Gross expenditure	2,041,738,000.00
Other income	777,591,815.36
Budgeted revenue expenditure	1,264,146,184.64
Contribution to reserves	8,029,797.91
Business rates income	(80,345,000.00)
Business rates top up	(67,887,241.00)
Other Government grants	(138,172,299.19)
Council tax collection fund balance (surplus)	(13,482,239.91)
Council tax requirement	**972,289,202.45**

8. The tax base is the number of Band D equivalent properties for precepting purposes. The tax base for 2025/26 is as follows, showing an increase of 1.22% from 2024/25:

Table 2 – 2025/26 Taxbase

Billing Authority	No. of Band D equivalent properties 2025/26	No. of Band D equivalent properties 2024/25	Change
Elmbridge	67,249.0	66,517.0	1.09%
Epsom & Ewell	33,846.9	33,762.4	0.25%
Guildford	60,636.1	59,890.4	1.23%
Mole Valley	42,386.9	41,693.1	1.64%
Reigate & Banstead	64,564.3	64,252.3	0.48%
Runnymede	35,814.4	35,495.8	0.89%
Spelthorne	40,619.9	39,241.0	3.39%
Surrey Heath	40,049.0	39,749.5	0.75%
Tandridge	39,457.7	39,128.0	0.84%
Waverley	59,096.7	58,262.3	1.41%
Woking	42,879.8	42,255.4	1.46%
Total	**526,600.7**	**520,247.2**	**1.22%**

9. The Council is required to provide, separately, information on the amount by which Council Tax is raised in order to fund Adult Social Care services. The Band D Council Tax precept for 2025/26 is calculated as follows:

Table 3 – Band D precept

Council Tax Precept	CTR	÷	taxbase			Level
Core precept	£ 821,360,175.82	÷	526,600.7	=	£	1,559.74
Adult Social Care precept*	£ 150,929,026.63	÷	526,600.7	=	£	286.61
Council tax precept	**£ 972,289,202.45**	**÷**	**526,600.7**	**=**	**£**	**1,846.35**

The amount charged for the ASC precept is the sum of the ASC precept increases since 2016/17.

10. The proposed increase is not considered excessive in accordance with the set of principles determined by the SoS.

Table 4 – Increase in Council Tax

Band D	A 2024/ 25	B 2025/26	C Base to measure increase (2024/25)	D Increase (B-A) ÷ C	Referendum Principle
Core precept	£1,507.16	£1,559.74	£1,758.60	2.99%	3%
ASC precept	£251.44	£286.61	£1,758.60	2.00%	2% on top of the core principle
Council tax precept	£1,758.60	£1,846.35	£1,758.60	**4.99%**	**Up to 5%**

11. The proposals result in an overall increase of £87.75 per annum, £1.69 per week, for a Band D dwelling.

12. Surrey County Council's level of Council Tax for each category of dwelling in its area will be as follows:

Table 5 – Council tax by valuation band

Valuation band	Core precept	ASC precept	Overall precept
A	£1,039.83	£191.07	£1,230.90
B	£1,213.13	£222.92	£1,436.05
C	£1,386.44	£254.76	£1,641.20
D	£1,559.74	£286.61	£1,846.35
E	£1,906.35	£350.30	£2,256.65
F	£2,252.96	£413.99	£2,666.95
G	£2,599.57	£477.68	£3,077.25
H	£3,119.48	£573.22	£3,692.70

13. The payment for each billing authority including any surplus or deficit balances on the Collection Fund is set out below:

Table 6 – Payment for each billing authority

Billing Authority	Payment
Elmbridge	124,705,510.15
Epsom & Ewell	62,878,313.34
Guildford	111,636,533.24
Mole Valley	79,055,822.82
Reigate & Banstead	119,918,088.90
Runnymede	66,841,591.44
Spelthorne	81,930,487.37
Surrey Heath	73,548,304.95
Tandridge	74,579,841.40
Waverley	111,219,562.05
Woking	79,457,386.73
Total*	985,771,442.36

* The total includes all council tax collection fund balances.

14. The billing authority payments are to be made in ten equal instalments on the following dates agreed with the District and Borough Councils.

Table 7 – Payment Dates

Payment dates	
16/04/2025	13/10/2025
20/05/2025	19/11/2025
30/06/2025	06/01/2026
29/07/2025	19/02/2026
15/09/2025	12/03/2026

This page is intentionally left blank

Capital, Investment and Treasury Management Strategy 2025/26

1. INTRODUCTION

1.1 The Capital, Investment and Treasury Management Strategy provides an overview of the three main components of capital planning. We have chosen to amalgamate the strategies into a single document because the Capital Programme, our Investment Strategy and our approach to Treasury Management cannot operate independently of one another. They are parts of an overall approach:

- **Capital expenditure and investments:** the Capital Programme; supporting Corporate, Directorate and Service priorities and the Investment Programme; generating income and supporting economic growth;
- **Financing our capital plans, and maintaining liquidity:** the Treasury Management Strategy; setting out how the capital programme will be financed and how cash investments will be managed; and
- **Repaying our debt in a prudent way:** the Minimum Revenue Provision (MRP) Policy, setting out how we use the revenue budget to repay debt.

8

Liquidity – Affordability - Prudence

This report sets out a high-level overview of how capital expenditure, capital financing, investments and treasury management activity contribute to the provision of services, along with an overview of how associated risk is managed and the implications for future financial sustainability.

1.2 The strategy sets out a clear picture of the ambition of the Council regarding capital expenditure and investment plans, within the financial constraints, risk appetite and regulatory framework that the Council operates.

1.3 The strategy is presented in the following elements, that set out the Council's approach to capital, investment and treasury management:

  a. Capital Overview - capital expenditure planning, risk management and long-term sustainability of capital expenditure plans (Section 2)

b. Investment Overview – setting out investment plans focusing on the approach to service and commercially led investment (Section 3);

c. The Treasury Management Strategy Statement (TMSS) – setting out how we borrow and invest to support our capital financing requirement (Section 4)

d. The Minimum Revenue Provision (MRP) Policy – setting out how we repay capital borrowing (included as the final page of this document, Annex G to the Budget)

1.4 Decisions made this year on capital, investment and treasury management will have financial consequences for the Council for many years into the future. They are therefore subject to both a national regulatory framework and to local policy framework, summarised in this report.

1.5 Our strategy will:

- Set out how we ensure that capital expenditure contributes to the achievement of corporate priorities and the organisation strategy;

- Explain how the Capital Programme is financed and demonstrate that it is affordable and sustainable;

- Explain the Council's approach to investments; and

- Set out and fulfil the Council's regulatory requirements in respect of Borrowing, Treasury Management and Investment.

2. CAPITAL OVERVIEW

Capital Expenditure and Financing:

2.1 The Council incurs two types of capital expenditure:
- service delivery capital programme expenditure
- capital investment

2.2 This section sets out the Council's capital expenditure and financing plans over the medium-term, provides an overview of the governance arrangements for approval and monitoring of expenditure and provides a projection of the capital financing requirement and how this will be funded and repaid. It links to the Council's borrowing strategy and sets out the Council's statutory duty to make an annual revenue provision for the repayment of debt, detailed in the MRP Policy (Annex G to the Budget).

Capital Expenditure

2.3 Capital expenditure refers to Local Authority spending on assets such as property, infrastructure, vehicles and equipment that will be used for more than one year. In Local Government this includes spending on assets owned by other bodies and loans and grants to other bodies, enabling them to buy assets.

2.4 The 2025/26 – 2029/30 Capital Programme, sets out capital expenditure plans of £1,399m, as summarised in Table 1. Our capital expenditure can be broken into three categories:
- Approved Capital Budget of £1,012m.
- Capital Pipeline of £382m, schemes that represent the capital ambitions of the Council but are subject to further detailed business cases and Member approval.

- Capital Investments of £4m, relating to expenditure on existing investment assets and capital loans to Council subsidiaries to spend on existing assets, ensuring the Council's compliance with the Prudential Code.

Table 1 - Estimates of Capital Expenditure

	2023/24 Actual £m	2024/25 Forecast £m	2025/26 Budget £m	2026/27 Budget £m	2027/28 Budget £m	2028/29 Budget £m	2029/30 Budget £m	Total Budget £m
Capital Programme - Budget	298	314	340	271	180	125	97	**1,012**
Capital Programme - Pipeline	-	42	62	84	68	67	100	**382**
Sub-total Capital Programme	298	356	402	355	248	192	197	1,394
Commercial Spend	1	25	4	0	-	-	-	**4**
TOTAL	299	381	406	355	248	192	197	1,399

2.5 Our medium-term approach to financial planning means we aim to deliver an ambitious Capital Programme of c£1,399m over the next 5 years, if all pipeline proposals are approved and delivered. The revenue implications of this proposed programme are integrated and factored into the Medium-Term Financial Strategy (MTFS) to 2029/30.

2.6 Planned capital investment will deliver significant investment in:
- The development of a greener future through the Net Zero 2030 and 2050 carbon reduction schemes and other projects contributing to the carbon and green agenda such as rooftop solar, electric vehicle infrastructure and low emission buses and vehicles;
- A Highway Maintenance programme delivering improvements to roads and footways across the County;
- Community led projects in our towns and high streets through the Your Fund Surrey scheme;
- Developing Farnham town centre and surrounding infrastructure;
- Creating a number of sites to look after our vulnerable older adults, through building Extra Care and Independent Living accommodation where residents can live independently for longer and integrate into the community;
- Delivering additional local places for children with Special Educational Needs and Disabilities – a key part in containing costs within the revenue budget;
- Providing additional capacity in schools, to provide a rich education with Schools Basic Needs funding;
- Investment in in-county alternative provision places and improvements for improved pupil support
- Investment in libraries across the County;
- Maintaining and developing our road infrastructure to help grow a sustainable economy, deliver safer and greener routes; and
- Accelerating our Property Rationalisation and Agile Corporate Estate Programme.

2.7 Capital projects are subject to a rigorous governance process to ensure they are aligned with the Council's priorities of:
- Growing a sustainable economy so everyone can benefit;
- Tackling health inequality;
- Enabling a greener future; and
- Empowering communities.

2.8   Fundamentally, they are approved on the principles of strategic fit, value for money, affordability and deliverability. Projects need to demonstrate value for money and that they are capable of being delivered within expected timescales.

2.9   Strategic Capital Groups (SCGs) for Infrastructure, Property and IT develop projects throughout the budget setting process which are scrutinised and approved by the Capital Programme Panel (CPP); a group of senior officers from across the organisation. Projects approved by CPP are then included in the budget when approved by Cabinet and Council. Fig 1, below summarises this process.

Fig 1: Capital Approval Process

	Strategic Mandate	Business Case	Delivery
Capital Strategy Groups	Strategic Mandates are developed and submitted to CPP	Approve Low Governance Schemes already in the budget where: Up to £1m and already been to Cabinet OR Up to 250k if not already been to Cabinet	Approve variations in scheme cost up to 10% and £250k
Capital Programme Panel	CPP approve Strategic Mandates	Approve Medium Governance Schemes where: Been to Cabinet and already in budget OR Up to £1m	Approve variations in scheme cost up to 10% and £500k
Cabinet		Approve High Governance Schemes or over £1m	Approve variations in scheme cost over 10% and £500k

Capital Funding

2.10   All capital expenditure must be financed, either from external sources (government grants and other contributions), the Council's own resources (revenue, reserves and capital receipts) or debt (borrowing, leasing and Private Finance Initiatives). The planned financing of the capital programme (as set out in Table 1 above), is as follows:

Table 2 - Capital Financing

	2023/24 Actual	2024/25 Forecast	2025/26 Budget	2026/27 Budget	2027/28 Budget	2028/29 Budget	2029/30 Budget	Total Budget
	£m	£m	£m	£m	£m	£m	£m	£m
Grants and Contributions	92	99	127	116	85	109	150	**588**
Revenue budgets	6	6	1	1	1	1	1	**4**
Capital receipts	45	23	32	26	11	8	8	**86**
Borrowing	155	253	246	211	152	73	38	**721**
TOTAL	**299**	**381**	**406**	**355**	**248**	**192**	**197**	**1,399**

2.11   **Asset disposals:** When a capital asset is no longer needed, it may be sold so that the proceeds, known as capital receipts, can be spent on new assets or to repay debt. Repayments of capital grants, loans and investments also generate capital receipts.

2.12   Table 2 above, shows the planned usage of £86m of capital receipts from the sale of Council assets to finance expenditure from 2025/26 onwards. Receipts are only included as sources of financing when there is a high level of confidence over the value and timing of their delivery. This approach is taken to ensure a prudent estimate of borrowing is factored into capital plans and included in the revenue budget for finance costs.

2.13 Government have recently extended the ability of Council's to utilise capital receipts for revenue expenditure in specific circumstances. The Council currently has no plans to utilise this flexibility from 2025/26 onwards.

2.14 **Gross additional borrowing** of £246m for 2025/26 is required, £217m net of MRP and refinancing of long-term borrowing.

Table 3 – Additional borrowing requirement

	31/03/2024 Actual £m	30/11/2024 Actual £m	31/03/2025 Estimate £m	31/03/2026 Forecast £m	31/03/2027 Forecast £m	31/03/2028 Forecast £m	31/03/2029 Forecast £m	31/03/2030 Forecast £m
Long term borrowing	472	468	463	455	446	440	435	430
Short term borrowing	295	525	535	535	-	-	-	-
Total borrowing	**767**	**993**	**998**	**990**	**446**	**440**	**435**	**430**
Forecast additional borrowing	-	5	-	216	928	1,036	1,061	1,047
Total forecast borrowing	**767**	**998**	**998**	**1,206**	**1,374**	**1,476**	**1,496**	**1,477**

2.15 Beyond March 2026 the split between long term and short-term borrowing will depend on decisions made in line with the Treasury Management Strategy below. This will include considerations about the prevailing rate of interest, the proportionality of the existing borrowing portfolio and other relevant considerations.

2.16 Borrowing is only a temporary source of finance, since loans and leases must be repaid, and this is therefore replaced over time by other financing, usually from revenue which is known as Minimum Revenue Provision (MRP). The Council's forecast MRP over the MTFS is set out in the following table and is based on the full MRP policy (Annex G).

Table 4 - Repayment of Debt Finance through Minimum Revenue Provision

	2023/24 Actual	2024/25 Forecast	2025/26 Budget	2026/27 Budget	2027/28 Budget	2028/29 Budget	2029/30 Budget
	£m	£m	£m	£m	£m	£m	£m
MRP	27	31	37	42	47	50	52

2.17 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 with MRP and capital receipts used to replace debt.

2.18 Based on the above figures for expenditure and financing, the Council's estimated CFR over the medium-term is set out in table 4.

Table 5 - Prudential Indicator: Estimates of Capital Financing Requirement

As at 31st March	2023/24 Actual	2024/25 Forecast	2025/26 Budget	2026/27 Budget	2027/28 Budget	2028/29 Budget	2029/30 Budget
	£m	£m	£m	£m	£m	£m	£m
Capital Programme	1,063	1,262	1,468	1,637	1,741	1,762	1,744
Investment Programme	440	456	451	442	433	425	416
TOTAL	**1,503**	**1,718**	**1,919**	**2,079**	**2,174**	**2,187**	**2,160**

2.19 Our capital plans lead to a £443m increase in the estimated CFR over the five-year period, from £1,718m to £2,160m (£721m of additional borrowing (see table 2), offset by £227m of MRP payments (see table 3) and £37m of PFI and finance lease adjustments). The revenue implications of this are set out below.

Revenue Budget Implications

2.20 Although capital expenditure is not charged directly to the revenue budget, interest payable on loans, and MRP are charged to revenue, offset by any investment income receivable. This is referred to as net financing costs.

2.21 Current projections show that net financing costs, contained within the central income and expenditure budget projections over the MTFS, rise from a net £41m in 2024/25 to £75m net in 2029/30. The gross and net costs of financing our capital plans are set out in the table, below.

Table 6 – Net Finance Cost

	2023/24 Actual	2024/25 Forecast	2025/26 Budget	2026/27 Budget	2027/28 Budget	2028/29 Budget	2029/30 Budget
	£m	£m	£m	£m	£m	£m	£m
MRP (not including PFI)	27	31	37	42	47	50	52
Interest Cost	34	30	34	37	38	40	41
Finance Cost	**61**	**61**	**71**	**79**	**85**	**90**	**94**
Investment Income	19	19	19	19	19	19	19
TOTAL	**42**	**41**	**52**	**60**	**66**	**72**	**75**

2.22 The proportion of finance cost to net revenue stream is a key indicator of direction of travel relative to medium term revenue resources and provides insight into the affordability of finance costs. Full revenue implications of net finance cost are set out in the TMSS (Section 4).

2.23 The Council's finance costs are increasing as a proportion of the net revenue budget, which is expected with an expanding Capital Programme, rising from c.4% in 2024/25 to 6% in 2029/30. This increase is partially contained through schemes enabling delivery of revenue efficiencies or income generation that finance themselves and offset the associated borrowing costs.

2.24 The below schemes are included in the Capital Programme on the basis of covering their own financing costs over the MTFS:

Approved Budget - £69m total spend over MTFS
- £22m – Looked After Children Schemes
- £13m – ASC Extra Care Housing
- £12m – ASC Supported Independent Living – Learning Disabilities Phase 1
- £7m – Sunbury Hub
- £6m – ASC Supported Independent Living – mental health
- £5m – ASC Independent Living / Short Breaks
- £3m – Staines Hub
- £1m – Various smaller schemes

Pipeline – £67m (to be approved after scrutiny of value for money, sustainability and assessment of deliverability)
- £21m – Materials Recovery Facility
- £12m – ASC Supported Independent Living – Learning Disabilities Phase 2
- £9m – ASC nursing / residential care
- £4m – Biodiversity Net Gain
- £4m – Household Loan Scheme

- £4m – net zero 2030 rooftop solar
- £3m – net zero 2030 LEDs
- £3m – SME decarbonisation loan scheme
- £2m – Agile Office Estate Strategy
- £1m – Basingstoke Canal Campsite Improvements
- £1m – Surrey Farms Investment Plan
- £1m – 2050 – Investment in decarbonisation schemes to draw in carbon offset / inset finance
- £1m – Transformation Scheme – Libraries Open Access
- £1m – Various smaller schemes

Financial Sustainability

2.25 Due to the very long-term nature of capital expenditure and financing, the revenue budget implications of expenditure incurred over the MTFS will extend for up to 50 years into the future. The Section 151 Officer is satisfied that the proposed Capital Programme is prudent, affordable and sustainable, because it remains proportional to the Council's overall revenue budget.

Environmental Sustainability

2.26 Capital expenditure over the next 5-year period includes c.£353m of schemes that will contribute to carbon reduction, action on climate change and enabling a greener future. Of this spend, c.£188m is included for schemes in the approved budget and a further c.£165m for schemes in the pipeline, which are subject to ongoing development, scrutiny and challenge before being approved. The Council will continue to take direct action on environmental sustainability for future generations as part of the Carbon Net Zero targets set for 2030 and 2050.

3. INVESTMENT OVERVIEW

3.1 In addition to service-led capital expenditure, the Council has invested its money for a further three broad purposes:

- To support local public services by setting up, lending to or buying shares in other organisations (service investments);

- To earn investment income (known as commercial investments where this is the main purpose); and

- As a result of surplus cash from its day-to-day activities, for example when income is received in advance of expenditure (known as treasury management investments);

3.2 This investment strategy meets the requirements of the statutory guidance issued by the government in January 2018 and focuses on the first and second of these categories.

3.3 The statutory guidance defines investments as 'all of the financial assets of a local authority as well as other non-financial assets that the organisation holds primarily or partially to generate a profit; for example, investment property portfolios.' The Council interprets this to exclude (a) trade receivables which meet the accounting definition of financial assets but are not investments in the everyday sense of the word and (b)

8

7

property held partially to generate a profit but primarily for the provision of local public services. This aligns the Council's definition of an investment with that in the 2021 edition of the CIPFA Prudential Code.

Service Investments: Loans and Equity

3.4 **Overview:** The Council invests money in its subsidiaries and other organisations to support local public services and stimulate local economic growth. Subsidiaries of this nature include:

- Hendeca Group Ltd – a Local Authority Trading Company (LATCo) wholly owned by the Council for the provision of business services.

- Surrey Choices Ltd – a LATCo, wholly owned by the Council to deliver support options for young people and adults with a range of disabilities.

3.5 **Security:** The main risk when making service loans is that the borrower will be unable to repay the principal lent and/or the interest due. In order to limit this risk and ensure that total exposure to service loans remains prudent, decisions on service loans are made in the context of their value, the stability of the counterparty and an assessment of the risk of default. The current value of service loans is set out as follows:

Table 7 - Loans for service purposes in £ millions

Category of borrower	31/03/2024 actual			2025/26
	Balance owing £m	Loss allowance £m	Net figure in accounts £m	Approved limit £m
Subsidiaries	2	-	2	10

3.6 Accounting standards require the Council to set aside loss allowance for loans, reflecting the likelihood of non-payment. The figures for loans in the Council's Statement of Accounts are shown net of this loss allowance. However, the Council makes every reasonable effort to collect the full sum advanced and has appropriate credit control arrangements in place to recover overdue repayments. In the case of our service loans, these allowances are nil.

3.7 **Risk assessment:** The Council assesses the risk of loss before entering into and whilst holding service loans by reference to their financial position, past experience and other factors. We wholly own our subsidiaries for service purposes and so their financial position is subject to the same rigour and control as that of the Council.

Commercial Investments: Property

3.8 **Overview:** The Council holds investments in local commercial property; office space, leisure and retail, with the intention of supporting Surrey's economy and generating a surplus that will be spent on local public services. The table below shows the value of our investments by main category, including those under construction where the ultimate use is to be determined. The movement represents the net position of additional capital expenditure, depreciation, revaluations and disposals.

Table 8 - Property held for investment purposes in £ millions

| Property type | Actual purchase cost £m | 31/03/2024 actual | |
		Closing value £m	Movement £m
Office	118	71	(47)
Retail	6	3	(3)
Leisure	1	1	-
Total	**125**	**75**	**(50)**

3.9 **Security:** In accordance with government guidance, the Council considers a property investment to be secure if its accounting valuation is at, or higher than, its purchase cost including taxes and transaction costs.

3.10 The fair value of the Council's investment property portfolio is less than the purchase cost, reflecting the challenging commercial environment in which our investment properties operate, with particular pressure on retail. The Council continues to explore mitigating actions to protect the capital invested, such as alternate uses where appropriate. The Council holds investment properties for long-term rental income, and short-term fluctuation in investment values can be expected.

Commercial Investment – Equity Investments and Loans

3.11 **Overview:** The Council wholly owns Halsey Garton Property Ltd (HGP) and Surrey Property Group (SPG) which has a portfolio of national investment properties used to generate a return to the Council. The Council also wholly owns Halsey Garton Residential Ltd (HGR), which holds a portfolio of Surrey-based residential properties. The financial return from both companies takes the form of interest on the outstanding loan and dividend payments (where possible). The total value of our investment in SPG and HGR as at 31st March 2024 is set out below. The investment in SPG was impaired following a fair value review undertaken during the 2023/24 financial year end.

Table 9 - Equity and Loans to SPG and HGR in £ millions

| Category of investment | 31/03/2024 actual | | |
	Balance owing £m	Loss allowance £m	Net figure in accounts £m
Equity shares	97	(66)	31
Loans	242	(3)	239

3.12 Accounting standards require the Council to set aside loss allowance for investments, reflecting an assessment of risk. The figures in the Council's Statement of Accounts are shown net of this loss allowance. However, the Council makes every reasonable effort to collect the full sum advanced and has appropriate credit control arrangements in place to recover overdue repayments.

3.13 The Council also holds shares in the UK Municipal Bonds Agency (UKMBA), whose aim is to reduce the long-term borrowing costs of Local Authorities who join together to issue local authority bonds. The share value (initial cost £0.5m) has been written out

of the Council's balance sheet because the UKMBA set out a material uncertainty in its November 2020 accounts that would cast doubt on the company's ability to continue as a going concern. This material uncertainty continues and therefore the Council's position remains unchanged.

Managing the debt used to finance subsidiary loans

3.14 In previous financial years, the Council has borrowed money to lend on to Halsey Garton Property Ltd, in order to enable investment in property to generate a revenue income for the Council to support service delivery. Alongside the equity shares, these loans are set out in Table 8, above.

3.15 The council amended its MRP policy in 2022/23 to comply with changes that came into force for the 2023/24 financial year, which included a requirement to charge MRP on all subsidiary loans relating to investment properties, to ensure the money is set aside to repay debt without relying on the subsidiary selling assets or negotiating new debt. As such, the council provide MRP on capital loans in full, as it does for any other assets.

3.16 The Council's policy of providing for MRP in full means it is compliant with the latest guidance and there are no changes proposed to the policy for 2025/26 (MRP Policy (Annex G)). The Council's debt in relation to the loans to SPG are serviced over the life of the asset. When the subsidiary repays its loans, any resulting surplus would be recognised as a gain (a capital receipt) at the point of repayment.

Security

3.17 The value of property owned by Halsey Garton Property Ltd at 31st March 2024 was assessed as being £100m lower than cost, representing a 31% reduction, largely due to pressures on the retail environment. The Council has undertaken a fair value assessment of its investment in Halsey Garton Property Ltd and has subsequently impaired its investment in the company (table 8). However the company is holding the assets for long-term rental income and short-term variations in fair value should be expected. Over the long term, we would expect asset values to recover.

Risk Assessment and Liquidity

3.18 **Risk assessment:** The Council assesses the risk of loss before entering into and whilst holding property or subsidiary investments through a thorough analysis of the market and economic conditions using external advisors where necessary. Separately, the Council has a comprehensive risk management strategy to mitigate risks of over-spend or income shortfalls to the base budget position.

3.19 **Liquidity:** Compared with other investment types, property is relatively difficult to sell and convert to cash at short notice and can take a considerable period to sell in certain market conditions. The Council is not reliant on investments in property to maintain its liquidity and manages liquidity through other investments and borrowing. The Council has reserves and contingencies to maintain stability in the event of a period of lower returns from its investment portfolio.

Loan Commitments and Financial Guarantees

3.20 Although not strictly counted as investments, since no money has exchanged hands yet, loan commitments and financial guarantees carry similar risks to the Council and are included here for completeness.

3.21 We do not currently extend financial guarantees to other organisations, however if we chose to be part of a joint bond issue with UKMBA, we would be liable for defaults of other Local Authorities in proportion to the total amount of the bond. It is highly unlikely that another Local Authority would default and so the risk is theoretical rather than a practical reality.

Proportionality

3.22 The Council's revenue budget includes an element of profit generating investment activity to support services. Table 9 below shows the extent to which the expenditure planned to meet the service delivery objectives and/or place making role of the Council is dependent on achieving the expected net profit from investments over the lifecycle of the MTFS. Investment activity is forecast at around 1.5% of the Council's net revenue budget over the medium-term. Should we fail to achieve the expected net return, the Council would manage the impact on budget through use of contingency in the current financial year and a re-assessment of financial plans for the remainder of the medium-term.

Table 10 - Proportionality of Investments

	2023/24 Actual	2024/25 Forecast	2025/26 Budget	2026/27 Budget	2027/28 Budget	2028/29 Budget	2029/30 Budget
Investment income £m	19	19	19	19	19	19	19
Net revenue budget £m	1,102	1,208	1,264	1,271	1,272	1,274	1,275
Proportion %	**1.7%**	**1.6%**	**1.5%**	**1.5%**	**1.5%**	**1.5%**	**1.5%**

Commercial Governance

3.23 Commercial investments are taken through a rigorous Officer and Member led process to ensure that decisions are taken with an adequate level of scrutiny. The diagram, below, shows the governance groups charged with delivering commercial investments:

Fig 2: Commercial Governance
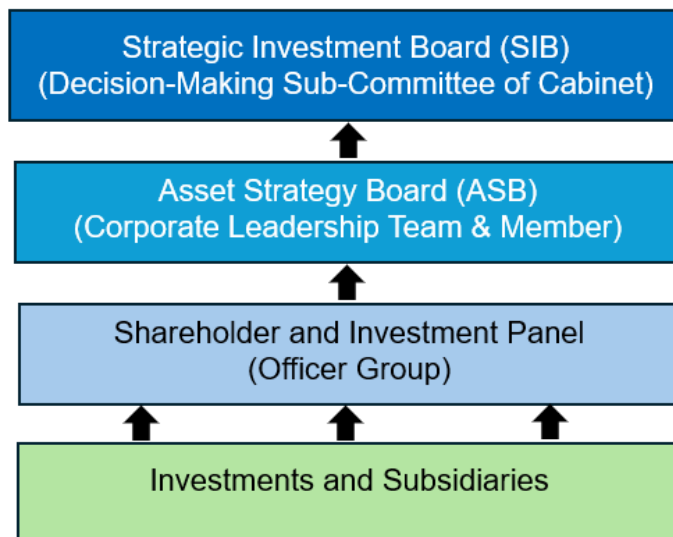
3.24 At officer level, oversight is provided by the Shareholder Investment Panel (SHIP) with representation from Finance (Chair), Land & Property and Legal.

3.25 The Asset Strategy Board (ASB) oversee and review the strategic decisions proposed for all Council owned assets taken at Shareholder Investment Panel and Capital Programme Panel, including monitoring delivery against the Asset & Place Strategy (2019-2030) and assessing that the Council is optimising the use of its assets, delivering value for money to residents.

3.26 The Member led Strategic Investment Board (SIB) monitors the Council's investment properties and subsidiary companies to ensure satisfactory performance and effective risk management. SIB provides effective oversight, ensuring alignment with the strategic objectives and values of the Council. SIB safeguards the Council's interests and takes decisions in matters that require the approval of the Council as owner or as a shareholder of a company.

Investment Indicators

3.27 The Council has set the following quantitative indicators to allow elected members and the public to assess the Council's total risk exposure as a result of its investment decisions.

3.28 **Total risk exposure:** The first indicator shows the Council's total exposure to potential investment losses. This includes amounts the Council is contractually committed to lend but have yet to be drawn down and guarantees the Council has issued over third-party loans.

Table 11 - Total investment exposure in £millions

Total investment exposure	31/03/2024 Actual £m	31/03/2025 Forecast £m	31/03/2026 Forecast £m
Treasury management investments	41	50	50
Service investments: loans	2	2	2
Commercial and economic growth investments: property	75	100	104
Commercial investments: loans	239	239	239
Commercial investments: shares	31	31	31
Total investments	**388**	**422**	**426**

3.29 **How investments are funded:** Government guidance is that these indicators should include how investments are funded. Since the Authority does not normally associate particular assets with particular liabilities, this guidance is difficult to comply with. However, the following investments could be described as being funded by borrowing. The remainder of the Authority's investments are funded by usable reserves and income received in advance of expenditure.

Table 12 - Investments funded by borrowing in £millions

Total investments funded by borrowing	31/03/2024 Actual £m	31/03/2025 Forecast £m	31/03/2026 Forecast £m
Commercial and economic growth investments: property	75	100	104
Commercial investments: loans	239	239	239
Commercial investments: shares	31	31	31
Total investments	**345**	**370**	**374**

3.30 **Rate of return received:** This indicator shows the investment income received less the associated costs, including the cost of borrowing where appropriate, as a proportion of the sum initially invested. Note that due to the complex local government accounting framework, not all recorded gains and losses affect the revenue account in the year they are incurred.

Table 13 - Investment rate of return (net of all costs)

Investments net rate of return	2023/24 Actual	2024/25 Forecast	2025/26 Forecast
Service investments	0.0%	0.0%	0.0%
Commercial investments: property	3.1%	3.1%	3.0%
Commercial investments: shares and loans	4.3%	4.3%	4.3%

4. Treasury Management Strategy Statement 2025/26

Introduction

4.1 Treasury management is the management of the Authority's cash flows, borrowing and investments, and the associated risks. The Authority has borrowed and invested substantial sums of money and is therefore exposed to financial risks including the loss of invested funds and the revenue effect of changing interest rates. The successful identification, monitoring and control of financial risk are therefore central to the Authority's prudent financial management.

4.2 Treasury management at Surrey County Council is conducted within the framework of the Chartered Institute of Public Finance and Accountancy's *Treasury Management in the Public Services: Code of Practice 2021 Edition* (the CIPFA Code) which requires the Council to approve a treasury management strategy before the start of each financial year.

4.3 This report fulfils the Council's legal obligation under the Local Government Act 2003 to have regard to the CIPFA Code. A full set of Prudential Indicators is set out in Annex 1 and a number of Treasury limits and indicators are set out below.

4.4 The Council tends to be cash rich in the short-term as revenue income (e.g. Council Tax, Business Rates and Government Grants) is typically received before it is spent, but cash poor in the long-term as capital expenditure is incurred before being financed. Surplus cash is invested until required, while a shortage of cash will be met by

borrowing, to avoid excessive credit balances or overdrafts in the bank current account.

4.5 Managing the cost of the Council's borrowing is at the heart of the Treasury Management Strategy (TMS) and we work proactively with our Treasury Management advisor, Arlingclose on a continual basis, to ensure that our approach represents the best balance between minimising cost and managing the risk of interest rate changes. Regular meetings with Arlingclose coincide with Bank of England Monetary Policy Committee meetings, however our strategy is under constant review throughout the year, and we can call on Arlingclose's expertise whenever required.

4.6 The Treasury Management Strategy is supported by four TMS annexes:
1. Prudential indicators – a Code requirement which supports our approach to borrowing, managing risk and highlighting our capital financing requirement.

2. Detailed external context – a detailed summary from Arlingclose of the current and future economic climate, risks and opportunities along with detailed interest rate forecasts.

3. Investment & Debt Portfolio Position as at 30 November 2024 – to highlight the current range of debt and investments.

4. Glossary of Terms

External Context

4.7 **Economic background:** The impact on the UK from the government's Autumn Budget, slower interest rate cuts, modestly weaker economic growth over the medium term, together with the impact from President-elect Trump's second term in office and uncertainties around US domestic and foreign policy, will be major influences on the Authority's treasury management strategy for 2025/26.

4.8 The Bank of England's (BoE) Monetary Policy Committee (MPC) reduced Bank Rate to 4.75% at its meeting in November 2024, having previously cut by 25bp from the 5.25% peak at the August MPC meeting. At the November meeting, eight Committee members voted for the cut while one member preferred to keep Bank Rate on hold at 5%.

4.9 The November quarterly Monetary Policy Report (MPR) is forecasting Gross Domestic Product (GDP) growth to pick up to around 1.75% (four-quarter GDP) in the early period of the BoE's forecast horizon before falling back. The impact from the Budget pushes GDP higher in 2025 than was expected in the previous MPR, before becoming weaker. Current GDP growth was shown to be 0.5% between April and June 2024, a downward revision from the 0.6% rate previously reported by the Office for National Statistics (ONS).

4.10 Office for National Statistics (ONS) figures reported the annual Consumer Price Index (CPI) inflation rate at 1.7% in September 2024, down from 2.2% in the previous month and lower than the 1.9% expected. Core CPI also declined further than expected to 3.2% against a forecast of 3.4% and the previous month's 3.6%. The outlook for CPI inflation in the November MPR showed it rising above the MPC's 2% target from 2024 into 2025 and reaching around 2.75% by the middle of calendar 2025. This represents a modest near-term increase due to the ongoing impacts from higher interest rates, the

Autumn Budget, and a projected margin of economic slack. Over the medium-term, once these pressures ease, inflation is expected to stabilise around the 2% target.

4.11 The labour market appears to be easing slowly however, but the data still requires treating with some caution. The latest figures reported the unemployment rate fell to 4.0% in the three months to August 2024, while economic inactivity also declined. Pay growth for the same period was reported at 4.9% for regular earnings (excluding bonuses) and 3.8% for total earnings. Looking ahead, the BoE MPR showed the unemployment rate is expected to increase modestly, rising to around 4.5%, the assumed medium-term equilibrium unemployment rate, by the end of the forecast horizon.

4.12 The US Federal Reserve has also been cutting interest rates, bringing down the Fed Funds Rate by 0.25% at its November 2024 monetary policy meeting to a range of 4.5%-4.75%. Further interest rate cuts are expected, but uncertainties around the potential inflationary impact of incoming President Trump's policies may muddy the waters in terms of the pace and magnitude of further rate reductions. Moreover, the US economy continues to expand at a decent pace, rising at an annual rate of 2.8% in the third quarter of 2024, and inflation remains elevated suggesting that monetary policy may need to remain more restrictive in the coming months than had previously been anticipated.

4.13 Euro zone inflation fell below the European Central Bank (ECB) 2% target in September 2024, the first time in over three years. This allowed the ECB to continue its rate cutting cycle and reduce its three key policy rates by 0.25% in October. Inflation is expected to rise again in the short term, but then fall back towards the 2% target during 2025, with the ECB remaining committed to maintaining rates at levels consistent with bringing inflation to target, but without suggesting a specific path.

4.14 **Credit outlook:** Credit Default Swap (CDS) prices have typically followed a general trend downwards during 2024, reflecting a relatively more stable financial period compared to the previous year. Improved credit conditions in 2024 have also led to greater convergence in CDS prices between ringfenced (retail) and non-ringfenced (investment) banking entities again.

4.15 High interest rates can lead to a deterioration in banks' asset quality through increased loan defaults and volatility in the value of capital investments. Fortunately, the rapid interest rate hikes during this monetary tightening cycle, while putting some strain on households and corporate borrowers, has not caused a rise in defaults, and banks have fared better than expected to date, buoyed by strong capital positions. Low unemployment and robust wage growth have also limited the number of problem loans, all of which are positive in terms of creditworthiness.

4.16 Moreover, while a potential easing of US financial regulations under a Donald Trump Presidency may aid their banks' competitiveness compared to institutions in the UK and other regions, it is unlikely there will be any material impact on the underlying creditworthiness of the institutions on the counterparty list maintained by Arlingclose, the authority's treasury adviser.

4.17 Overall, the institutions on our adviser Arlingclose's counterparty list remain well-capitalised and their counterparty advice on both recommended institutions and maximum duration remain under constant review and will continue to reflect economic conditions and the credit outlook.

4.18 Interest **rate forecast (November 2024):** The Authority's treasury management adviser Arlingclose forecasts that The Bank of England's Monetary Policy Committee will continue reducing rates during through 2025, taking Bank Rate to around 3.75% by the end of the 2025/26 financial year. The effect from the Autumn Budget on economic growth and inflation has reduced previous expectations in terms of the pace of rate cuts as well as pushing up the rate at the end of the loosening cycle.

4.19 Arlingclose expects long-term gilt yields to remain broadly at current levels on average (amid continued volatility), but to end the forecast period modestly lower compared to now. Yields will continue remain relatively higher than in the past, due to quantitative tightening and significant bond supply. As ever, there will be short-term volatility due to economic and (geo)political uncertainty and events.

4.20 A more detailed economic and interest rate forecast provided by Arlingclose is in the TMS Annex 2.

4.21 For the purpose of setting the budget, it has been assumed that new treasury investments will be made and that new loans will be borrowed at an average rate of 4.25% across the year.

Local Context:

4.22 On 31 March 2024 the Council held £743.2m borrowing (£461m of long-term borrowing and £282.2m short-term borrowing) and £41m of cash investments. By 30th November 2024, this had increased to £970.8m borrowing (£458.1m of long-term borrowing and £512.7m of short-term borrowing), with £68.4m of investments. The increase in borrowing is driven by the capital expenditure incurred by the Council through the year, in line with the approved 2024/25 capital programme.

4.23 The underlying need to borrow for capital purposes is measured by the Capital Financing Requirement (CFR), while balance sheet resources are the underlying resources available for investment. The Council's current strategy is to maintain borrowing and investments below their underlying levels, sometimes known as internal borrowing.

4.24 Internal borrowing allows the Council to utilise its internal cash balances (i.e. working capital and reserves) which are not required in the short to medium-term in order to reduce risk and keep interest costs low. Forecast changes in these sums are shown in the balance sheet analysis in Table 13 below.

Table 14 - Balance sheet summary and forecast

	31/03/2024 Actual £m	31/03/2025 Estimate £m	31/03/2026 Forecast £m	31/03/2027 Forecast £m	31/03/2028 Forecast £m	31/03/2029 Forecast £m	31/03/2030 Forecast £m
	£m	£m	£m	£m	£m	£m	£m
Capital financing requirement	1,503	1,718	1,919	2,079	2,174	2,187	2,160
Less: other debt liabilities	(88)	(81)	(74)	(67)	(59)	(52)	(44)
Loans CFR	**1,415**	**1,637**	**1,845**	**2,013**	**2,115**	**2,135**	**2,116**
Less: external long term borrowing	(472)	(463)	(455)	(446)	(440)	(435)	(430)
Less: external short term borrowing	(295)	(535)	-	-	-	-	-
Internal borrowing (based on projection of level of reserves, balances and working capital)	(648)	(639)	(639)	(639)	(639)	(639)	(639)
Projected additional external borrowing requirement	**-**	**-**	**751**	**928**	**1,036**	**1,061**	**1,047**

8

4.25 The Council has an increasing CFR over the period to 31 March 2030, due to the proposed Capital Programme and approved investment strategy projects. The maximisation of internal borrowing leads to a borrowing requirement above the Council's ability to utilise its internal resources to fund this capital expenditure. It will therefore be required to raise additional external borrowing over the forecast period.

4.26 The Council is currently holding high levels of short-term borrowing due to the recent interest rate environment, which has seen long term interest rates remain at higher rates. While this strategy reduces the interest payable over the medium term it does increase the Council's exposure to interest rate volatility. The Council's strategy will be to increase long term borrowing and reduce this risk as prevailing interest rates reduce.

4.27 The CFR represents the Councils total underlying need to borrow to totally fund the historic and planned capital programme. The Council's use of internal borrowing where available means that the current level of borrowing is below the total CFR. Were the internal resources not available to maintain the current level of internal borrowing then this would need to be met by additional external borrowing above that set out in table 13, further increasing the Council's exposure to interest rate risk. The table above shows that the Council anticipates an ongoing ability to utilise short-term internal resources to continue to reduce the overall borrowing required over the Medium Term Financial Strategy period.

4.28 CIPFA's Prudential Code for Capital Finance in Local Authorities recommends that the Council's total debt should be lower than its highest forecast CFR over the next three years. Table 13 shows that the Council expects to comply with this recommendation during 2025/26.

4.29 **Liability benchmark:** To compare the Council's actual borrowing against an alternative strategy, a liability benchmark has been calculated showing the lowest risk level of borrowing. This assumes the same forecasts as table 13 above, but that cash and investment balances are kept to a minimum level of £50m at each year-end to maintain sufficient liquidity but minimise credit risk. This cash and investment balance is the difference between the dotted red line and solid red line in the graph below.

4.30 The liability benchmark 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 liability 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.

Table 15 – Liability Benchmark

Position at 31 March	2023/24 Actual	2024/25 Projected	2025/26	2026/27	2027/28	2028/29	2029/30
			← ------------------- Estimated ----------------------- →				
	£m	£m	£m	£m	£m	£m	£m
Loans CFR	1,415	1,637	1,845	2,013	2,115	2,135	2,116
External borrowing	(767)	(463)	(455)	(446)	(440)	(435)	(430)
Internal (over) borrowing	**648**	**1,174**	**1,390**	**1,567**	**1,675**	**1,700**	**1,686**
Balance sheet resources	(689)	(689)	(689)	(689)	(689)	(689)	(689)
Net investments / (new borrowing)	**41**	**(485)**	**(701)**	**(878)**	**(986)**	**(1,011)**	**(997)**
Treasury investments	41	50	50	50	50	50	50
New borrowing	**0**	**535**	**751**	**928**	**1,036**	**1,061**	**1,047**
Net loans requirement	726	948	1,156	1,324	1,426	1,446	1,427
Liquidity allowance	54	50	50	50	50	50	50
Liability benchmark	**780**	**998**	**1,206**	**1,374**	**1,476**	**1,496**	**1,477**

Graph 1: Liability benchmark

Liability Benchmark - Surrey CC
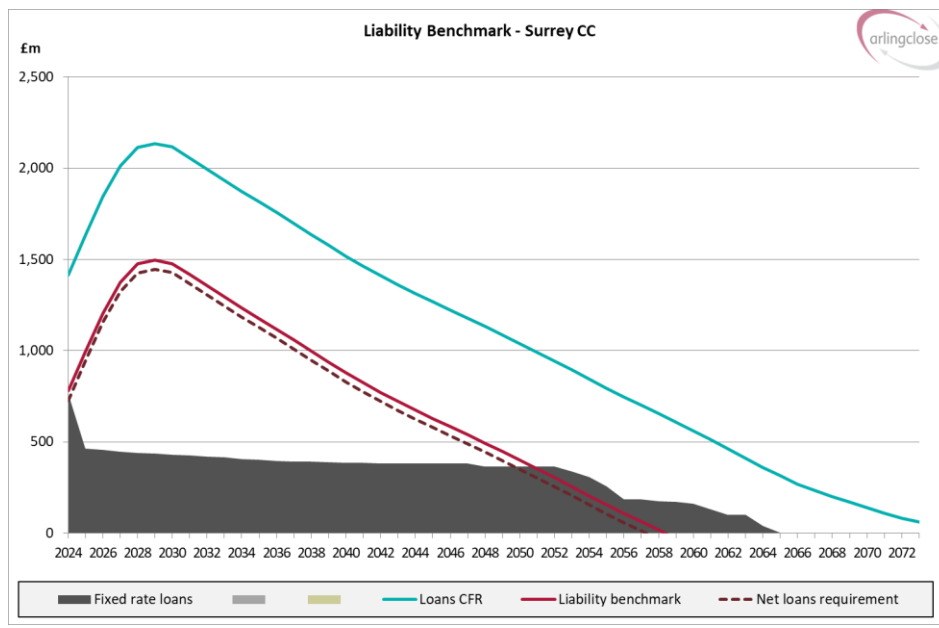
4.31 The long-term liability benchmark assumes:

- Capital expenditure funded by borrowing as per the 2025-30 Capital Programme, with no further assumed expenditure factored in beyond the MTFS period;

- Projects in the Capital Programme (Budget and Pipeline) and approved investment strategy spend are included;

- Minimum Revenue Provision (MRP) on new capital expenditure is based on the attached MRP policy;

- Reserves and Balances are based on proposed and approved use over the life of the Medium-Term Financial Strategy (MTFS); and

- The benchmark is based on our assumptions on capital expenditure and the external loans requirement may not ultimately reduce to zero as future capital expenditure is approved.

4.32 Overall, the liability benchmark shows that we are currently borrowing exactly what we need, because the amount of external debt (grey shaded area) matches the liability benchmark (red line). As we progress over the medium term, the gap between total external debt and the liability benchmark grows, meaning that we need to borrow more money to meet our financing requirement. We aim to avoid a scenario where our external debt exceeds our liability benchmark, as it indicates that we are borrowing more than we need – i.e. borrowing to invest, carrying with it an increased risk of investment returns. While the graph shows this happening in 2050, this does assume that there is no capital expenditure funding by borrowing after 2029/30, which is unlikely.

4.33 The difference between the CFR (underlying need to borrow – represented by the blue line) and actual external borrowing represents the level of internal borrowing (utilisation of short term reserves and balances). The current strategy to internally borrow continues to support the Council's financial position in the short to medium-term.

4.34 As shown, the Council's current debt portfolio is long dated and there are no significant repayments until the 2050s. An alternate strategy would be to increase our long-term fixed rate borrowing now. The liability benchmark illustrates that if we were to do so, it would be for a reasonably modest amount over a period of up to 20 years (to avoid a significant amount of fixed-rate debt exceeding our liability benchmark).

Borrowing Strategy

4.35 **Objectives:** Authority currently holds £917m of loans, an increase of £150m on the previous year, as part of its strategy for funding previous years' capital programmes. The balance sheet forecast in table 1 shows that the Authority expects to borrow up to £250m in 2025/26. The Authority may also borrow additional sums to pre-fund future years' requirements, providing this does not exceed the authorised limit for borrowing of £1,272m (table 5).

4.36 **Objectives:** The Council's main objective when borrowing money is to strike an appropriate balance between securing low interest costs and achieving certainty of those costs over the period for which funds are required. To achieve this, the key aim is to maximise internal borrowing and use short-term borrowing to manage cashflow shortfalls, striking a balance between cheaper short-term loans and long-term fixed rate loans where the future cost is known but higher. The Council does not borrow to invest for the primary purpose of financial return and therefore retains full access to the Public Works Loans Board.

4.37 **Strategy**: The Council is facing unprecedented financial pressures, principally driven by rising need for services from residents and the increasing costs of providing such services.   Given the significant cuts to public expenditure and in particular to local government funding, the Authority's borrowing strategy continues to address the key issue of affordability without compromising the longer-term stability of the debt

portfolio. Short-term interest rates are currently higher than in the recent past but are expected to fall in the coming year and it is therefore likely to be more cost effective over the medium-term to either use internal resources, or to borrow short-term loans instead. The risks of this approach will be managed by keeping the Authority's interest rate exposure within the limit set in the treasury management prudential indicators, see below.

4.38 By doing so, the Authority is able to reduce net borrowing costs (despite foregone investment income) and reduce overall treasury risk. The benefits of internal / short-term borrowing will be monitored regularly against the potential for incurring additional costs by deferring borrowing into future years. Arlingclose will assist the Authority with this 'cost of carry' and breakeven analysis. Its output may determine whether the Authority borrows additional sums at long-term fixed rates in 2025/26 with a view to keeping future interest costs low, even if this causes additional cost in the short-term. The Council's current exposure to interest rate risk is high die to the level of short term borrowing. Consideration will be give to converting some of this short term borrowing to long term borrowing, as and when interest rates begin to reduce, in line with market expectations.

4.39 The Authority has previously raised the majority of its long-term borrowing from the PWLB but will consider long-term loans from other sources including banks, pensions and local authorities, and will investigate the possibility of issuing bonds and similar instruments, in order to lower interest costs and reduce over-reliance on one source of funding in line with the CIPFA Code. PWLB loans are no longer available to local authorities planning to buy investment assets primarily for yield; the Authority intends to avoid this activity in order to retain its access to PWLB loans.

4.40 Alternatively, the Authority may arrange forward starting loans, where the interest rate is fixed in advance, but the cash is received in later years. This would enable certainty of cost to be achieved without suffering a cost of carry in the intervening period.

4.41 In addition, the Authority may borrow [further] short-term loans to cover unplanned cash flow shortages

4.42 **Sources of borrowing:** The approved sources of long-term and short-term borrowing are:
- UK Infrastructure Bank Ltd
- HM Treasury's PWLB lending facility (formerly the Public Works Loan Board)
- National Wealth Fund Ltd (formerly UK Infrastructure Bank Ltd)
- any institution approved for investments (see below)
- any other bank or building society authorised to operate in the UK
- any other UK public sector body
- UK public and private sector pension funds (except the Surrey Pension Fund)
- capital market bond investors
- retail investors via a regulated peer-to-peer platform
- UK Municipal Bonds Agency plc and other special purpose companies created to enable local authority bond issues

4.43 The Council has previously raised the majority of its long-term borrowing from the PWLB. For short-term borrowing, the Council has, and will continue, to use other

sources of finance, such as loans from other Local Authorities, pension funds and other public bodies as these are often available at more favourable rates. These short-term loans leave the Council exposed to the risk of interest rate rises and are therefore subject to the interest rate exposure limits in the treasury management indicators below.

4.44   Under the Prudential Code, an authority must not borrow to invest primarily for financial return. It is not prudent for local authorities to make any investment or spending decision that will increase the capital financing requirement, and so may lead to new borrowing, unless directly and primarily related to the functions of the authority and where any financial returns are either related to the financial viability of the project in question or otherwise incidental to the primary purpose. Authorities with commercial land and property may invest in maximising its value, including repair, renewal and updating of the properties. This Strategy certifies that the Council's capital spending plans do not include the acquisition of assets primarily for yield.

4.45   **Other sources of debt finance:** In addition, capital finance may be raised by the following methods that are not borrowing, but may be classed as other debt liabilities:
- leasing
- hire purchase
- Private Finance Initiative (PFI)
- sale and leaseback
- similar asset-based finance

All such sources of finance are subject to a robust options appraisal.

4.46   **Municipal Bonds Agency:** UK Municipal Bonds Agency plc was established in 2014 by the Local Government Association as an alternative to the PWLB. It issues bonds on the capital markets and lends the proceeds to local authorities. This is a more complicated source of finance than the PWLB for two reasons: borrowing authorities will be required to provide bond investors with a guarantee to refund their investment in the event that the agency is unable to for any reason; and there will be a lead time of several months between committing to borrow and knowing the interest rate payable. Any decision to borrow from the Agency will therefore be the subject of a separate report. Our current strategy generally favours PWLB borrowing for long term debt due to ease of access to borrowing and certainty of low rates, however this is periodically reviewed with Arlingclose and when a decision for increased long-term borrowing is made all options will be scrutinised.

4.47   **Short-term and variable rate loans**: These loans leave the Authority exposed to the risk of short-term interest rate rises and are therefore subject to the interest rate exposure limits in the treasury management indicators below. Financial derivatives may be used to manage this interest rate risk (see section below).

4.48   **Debt rescheduling:** The PWLB allows authorities to repay loans before maturity and either pay a premium or receive a discount according to a set formula based on current interest rates. Other lenders may also be prepared to negotiate premature redemption terms. The Authority may take advantage of this and replace some loans with new loans, or repay loans without replacement, where this is expected to lead to an overall cost saving or a reduction in risk. The recent rise in interest rates means

8

that more favourable debt rescheduling opportunities should arise than in previous years.

Borrowing Costs

4.49 Gross borrowing costs include interest payable and the statutory charge on the general fund for MRP. The gross borrowing costs associated with the 2025/26 to 2029/30 Capital Programme increase from £71m in 2025/26 to £94m by 2029/30.

4.50 Paragraph 1.18 of Annex 1 shows the ratio of gross financing costs against the net revenue stream (the amount funded from council tax, business rates and general government grants). Gross borrowing costs as a proportion of net revenue stream increases over the MTFS period from 5.6% in 2025/26 to 7.3% in 2029/30.

4.51 Net borrowing costs are calculated after offsetting interest and investment income and over the same period, net borrowing costs grow from £52m in 2025/26 to £75m in 2029/30.

4.52 Paragraph 1.19 of Annex 1 shows net borrowing costs against the net revenue stream increasing from 4.1% in 2025/26 to 5.9% in 2029/30.

4.53 Offsetting the increase in borrowing costs; many of the capital schemes are crucial to delivering revenue efficiencies, cost containment or income generation. After accounting for interest, investment and rental income to be generated by pipeline projects, net borrowing costs are projected to be contained within the budget envelope for the MTFS period.

Treasury Investment Strategy

4.54 The Council holds invested funds representing income received in advance of expenditure plus reserves. For the first half of 2024/25, the Council held average balances of £66.8m, compared with £98m for the equivalent period in 2023/24. The average return for the first half of 2024/2025 was 5.14%. Cash balances are expected to reduce during the remainder of 2024/25 and over the MTFS.

4.55 **Objectives:** The CIPFA Code requires the Authority to invest its treasury funds prudently, and to have regard to the security and liquidity of its investments before seeking the highest rate of return, or yield. The Authority's objective when investing money is to strike an appropriate balance between risk and return, minimising the risk of incurring losses from defaults and the risk of receiving unsuitably low investment income. Where balances are expected to be invested for more than one year, the Authority will aim to achieve a total return that is equal or higher than the prevailing rate of inflation, in order to maintain the spending power of the sum invested. The Authority aims to be a responsible investor and will consider environmental, social and governance (ESG) issues when investing.

4.56 **Strategy:** As demonstrated by the liability benchmark above, the Council expects to be a long-term borrower and new treasury investments will therefore be made primarily to manage day-to-day cash flows using short-term low risk instruments**.**

4.57 While the Council's investment balances remain low (less than £150m), Money Market Funds and short-term bank deposits will be utilised, with a cash limit per

counterparty/fund of £25m. If the economic situation changes, which results in a decision to undertake additional borrowing, resulting in higher cash balances, other investment counterparties may be considered and the counterparty limits set out below would apply.

4.58 **ESG policy**: Environmental, social and governance (ESG) considerations are increasingly a factor in global investors' decision making, but the framework for evaluating investment opportunities is still developing and therefore the Authority's ESG policy does not currently include ESG scoring or other real-time ESG criteria at an individual investment level. When investing in banks and funds, the Authority will prioritise banks that are signatories to the UN Principles for Responsible Banking and funds operated by managers that are signatories to the UN Principles for Responsible Investment, the Net Zero Asset Managers Alliance and/or the UK Stewardship Code.

4.59 **Business models**: Under the IFRS 9 standard, the accounting for certain investments depends on the Authority's "business model" for managing them. The Authority aims to achieve value from its treasury investments by a business model of collecting the contractual cash flows and therefore, where other criteria are also met, these investments will continue to be accounted for at amortised cost.

4.60 **Approved counterparties**: The Authority may invest its surplus funds with any of the counterparty types in table 3 below, subject to the limits shown.

Table 16 - Approved investment counterparties and limits

Credit rating	Banks unsecured	Banks secured	Government*
UK Govt	n/a	n/a	£ Unlimited 50 years
A- and above	£10m 6 months	£20m 13 months	£20m 13 months
None	£1m 6 months	n/a	n/a
Pooled Funds	£25m per fund		

* UK Local Authorities

This table must be read in conjunction with the notes below.

4.61 **Minimum credit rating:** Treasury investments in the sectors marked with an asterisk will only be made with entities whose lowest published long-term credit rating is no lower than A-. Where available, the credit rating relevant to the specific investment or class of investment is used, otherwise the counterparty credit rating is used. However, investment decisions are never made solely based on credit ratings, and all other relevant factors including external advice will be taken into account.

4.62 **UK Government:** Sterling-denominated investments with or explicitly guaranteed by the UK Government, including the Debt Management Account Deposit Facility, treasury bills and gilts. These are deemed to be zero credit risk due to the government's ability to create additional currency and therefore may be made in unlimited amounts for up to 50 years.

4.63 **Local authorities and other government entities:** Loans to, and bonds and bills issued or guaranteed by, other national governments, regional and local authorities and multilateral development banks. These investments are not subject to bail-in, and there is generally a lower risk of insolvency, although they are not zero risk.

4.64 **Secured investments:** Investments secured on the borrower's assets, which limits the potential losses in the event of insolvency. The amount and quality of the security will be a key factor in the investment decision. Covered bonds, secured deposits and reverse repurchase agreements with banks and building societies are exempt from bail-in. Where there is no investment specific credit rating, but the collateral upon which the investment is secured has a credit rating, the higher of the collateral credit rating and the counterparty credit rating will be used. The combined secured and unsecured investments with any one counterparty will not exceed the cash limit for secured investments.

4.65 **Banks and building societies (unsecured):** Accounts, deposits, certificates of deposit and senior unsecured bonds with banks and building societies, other than multilateral development banks. These investments are subject to the risk of credit loss via a bail-in should the regulator determine that the bank is failing or likely to fail. See below for arrangements relating to operational bank accounts.

4.66 **Registered providers (unsecured):** Loans to, and bonds issued or guaranteed by, registered providers of social housing or registered social landlords, formerly known as housing associations. These bodies are regulated by the Regulator of Social Housing (in England), the Scottish Housing Regulator, the Welsh Government and the Department for Communities (in Northern Ireland). As providers of public services, they retain the likelihood of receiving government support if needed.

4.67 **Money market funds:** Pooled funds that offer same-day or short notice liquidity and very low or no price volatility by investing in short-term money markets. They have the advantage over bank accounts of providing wide diversification of investment risks, coupled with the services of a professional fund manager in return for a small fee. Although no sector limit applies to money market funds, the Authority will take care to diversify its liquid investments over a variety of providers to ensure access to cash at all times.

4.68 **Strategic pooled funds:** Bond, equity and property funds, including exchange traded funds, that offer enhanced returns over the longer term but are more volatile in the short term. These allow the Authority to diversify into asset classes other than cash without the need to own and manage the underlying investments. Because these funds have no defined maturity date, but can be either withdrawn after a notice period or sold on an exchange, their performance and continued suitability in meeting the Authority's investment objectives will be monitored regularly.

4.69 **Real estate investment trusts:** Shares in companies that invest mainly in real estate and pay the majority of their rental income to investors in a similar manner to pooled property funds. As with property funds, REITs offer enhanced returns over the longer term, but are more volatile especially as the share price reflects changing demand for the shares as well as changes in the value of the underlying properties.

4.70 **Other investments:** This category covers treasury investments not listed above, for example unsecured corporate bonds and unsecured loans to companies and universities. Non-bank companies cannot be bailed-in but can become insolvent placing the Authority's investment at risk.

4.71 **Operational bank accounts:** The Authority may incur operational exposures, for example though current accounts, collection accounts and merchant acquiring services, to any UK bank with credit ratings no lower than BBB- and with assets greater than £25 billion. These are not classed as investments but are still subject to the risk of a bank bail-in, and balances will therefore be kept below £1m where practical. The Bank of England has stated that in the event of failure, banks with assets greater than £25 billion are more likely to be bailed-in than made insolvent, increasing the chance of the Authority maintaining operational continuity.

4.72 **Risk assessment and credit ratings**: Credit ratings are obtained and monitored by the Authority's treasury advisers, who will notify changes in ratings as they occur. The credit rating agencies in current use are listed in the Treasury Management Practices document. Where an entity has its credit rating downgraded so that it fails to meet the approved investment criteria then:

- no new investments will be made,

- any existing investments that can be recalled or sold at no cost will be, and

- full consideration will be given to the recall or sale of all other existing investments with the affected counterparty.

4.73 Where a credit rating agency announces that a credit rating is on review for possible downgrade (also known as "negative watch") so that it may fall below the approved rating criteria, then only investments that can be withdrawn [on the next working day] will be made with that organisation until the outcome of the review is announced. This policy will not apply to negative outlooks, which indicate a long-term direction of travel rather than an imminent change of rating.

4.74 **Other information on the security of investments**: The Council understands that credit ratings are good, but not perfect, predictors of investment default. Full regard will therefore be given to other available information on the credit quality of the organisations in which it invests, including credit default swap prices, financial statements, information on potential government support, reports in the quality financial press and analysis and advice from the Authority's treasury management adviser. No investments will be made with an organisation if there are substantive doubts about its credit quality, even though it may otherwise meet the above criteria.

4.75 **Reputational aspects:** The Council is aware that investment with certain counterparties, while considered secure from a purely financial perspective, may leave it open to criticism, valid or otherwise, that may affect its public reputation, and this risk will therefore be taken into account when making investment decisions.

4.76 When deteriorating financial market conditions affect the creditworthiness of all organisations, as happened in 2008, 2020 and 2022, this is not generally reflected in credit ratings, however can be seen in other market measures. In these circumstances, the Authority will restrict its investments to those organisations of higher credit quality and reduce the maximum duration of its investments to maintain

the required level of security. The extent of these restrictions will be in line with prevailing financial market conditions. If these restrictions mean that insufficient commercial organisations of high credit quality are available to invest the Authority's cash balances, then the surplus will be deposited with the UK Government or other local authorities. This will cause investment returns to fall but will protect the principal sum invested.

4.77 **Investment limits**: The Council's revenue reserves available to cover investment losses are forecast to be £78.4m on 31st March 2025. This consists of the Budget Equalisation Reserve, the Revolving Investment and Infrastructure Fund and the Interest Rate Reserve. In order that no more than 30% of available reserves will be put at risk in the case of a single default, the maximum that will be lent to any one organisation (other than the UK Government) will be £20 million. A group of entities under the same ownership will be treated as a single organisation for limit purposes.

Table 17 – Investment Limits

	Cash limit
Any single organisation, except the UK Central Government	£20m each
UK Central Government	Unlimited
Any group of organisations under the same ownership	£20m per group
Any group of pooled funds under the same management (including Money Market Funds)	£25m per manager
Money Market Funds (Total)	Unlimited
Unsecured investments with Building Societies	£10m in total

4.78 **Liquidity management:** The Council uses cash flow forecasting to determine the maximum period for which funds may prudently be committed. The forecast is compiled on a prudent basis to minimise the risk of the Authority being forced to borrow on unfavourable terms to meet its financial commitments. Limits on long-term investments are set by reference to the Authority's medium-term financial plan and cash flow forecast.

4.79 The Council will spread its liquid cash over at least four providers (e.g. bank accounts and money market funds), of which at least two will be UK domiciled, to ensure that access to cash is maintained in the event of operational difficulties at any one provider.

Treasury Management Prudential Indicators

4.80 The Council measures and manages its exposures to treasury management risks using the following indicators.

4.81 **Maturity structure of borrowing:** This indicator is set to control the Council's exposure to refinancing risk. The upper and lower limits on the maturity structure of borrowing will be:

Refinancing rate risk indicator	Upper limit	Lower limit
Under 12 months	60%	0%
12 months and within 24 months	50%	0%

24 months and within 5 years	50%	0%
5 years and within 10 years	75%	0%
10 years and above	100%	25%

Time periods start on the first day of each financial year. The maturity date of borrowing is the date of the loans are due to be repaid.

4.82 **Long-term treasury management investments:** The purpose of this indicator is to control the Council's exposure to the risk of incurring losses by seeking early repayment of its investments. The prudential limits on the long-term treasury management investments will be:

Price risk indicator	2024/25	2025/26	2026/27	No fixed date
Limit on principal invested beyond year end	£40m	£20m	£10m	£40m

Long-term investments with no fixed maturity date include strategic pooled funds and real estate investment trusts but exclude money market funds and bank accounts with no fixed maturity date as these are considered short-term.

Related Matters

4.83 The CIPFA Code requires the Council to include the following in its treasury management strategy.

4.84 **Financial Derivatives:** Local Authorities have previously made use of financial derivatives embedded into loans and investments both to reduce interest rate risk (e.g. interest rate collars and forward deals) and to reduce costs or increase income at the expense of greater risk (e.g. LOBO loans and callable deposits). The general power of competence in Section 1 of the *Localism Act 2011* removes much of the uncertainty over Local Authorities' use of standalone financial derivatives (i.e. those that are not embedded into a loan or investment).

4.85 The Council will only use standalone financial derivatives (such as swaps, forwards, futures and options) where they can be clearly demonstrated to reduce the overall level of the financial risks that the Council is exposed to. Additional risks presented, such as credit exposure to derivative counterparties, will be taken into account when determining the overall level of risk. Embedded derivatives, including those present in pooled funds and forward starting transactions, will not be subject to this policy, although the risks they present will be managed in line with the overall treasury risk management strategy.

4.86 Financial derivative transactions may be arranged with any organisation that meets the approved investment criteria. The current value of any amount due from a derivative counterparty will count against the counterparty credit limit and the relevant foreign country limit.

4.87 In line with the CIPFA Code, the Authority will seek external advice and will consider that advice before entering into financial derivatives to ensure that it fully understands the implications.

4.88 **Markets in Financial Instruments Directive**: The Council has opted in to "professional client status" with its providers of financial services, including advisers, banks, brokers and fund managers, allowing it access to a greater range of services but without the greater regulatory protections afforded to individuals and small companies. Given the size and range of the Council's treasury management activities, the Section 151 Officer believes this to be the most appropriate status.

4.89 **Treasury Management Advice:** Surrey County Council has appointed Arlingclose Limited as Treasury management advisers and receives specific advice on investments, debt and capital finance matters.

4.90 **Treasury Management Training**: Member and Officer training needs are assessed regularly as part of the staff appraisal process. Additional training will be provided as and when there is a change in roles and responsibilities. The Council also benefits from the Orbis partnership Centre of Expertise, which provides a robust Treasury team providing day to day treasury management operational activities to Surrey County Council, Brighton & Hove City Council and East Sussex County Council.

Knowledge and Skills

4.91 The Council employs professionally qualified and experienced staff in senior positions with responsibility for making capital expenditure, borrowing and investment decisions. The Council pays for officers to study towards relevant professional qualifications including CIPFA.

4.92 All officers involved in the treasury and investment management function have access to relevant technical guidance and training to enable them to acquire and maintain the appropriate level of expertise, knowledge and skills to undertake the duties and responsibilities allocated to them. The Council currently employs treasury management advisors through Arlingclose (who commenced a new four-year contract from 1st January 2022) and seeks external legal and property related advice and due diligence as required. The Council's investment Strategy is supported by guidance from our advisors, Savills. The Council's Treasury Management and borrowing strategies are supported by guidance from our advisors, Arlingclose. Both are on hand to guide key decisions and provide proactive advice in response to emerging market trends.

4.93 Those charged with governance (Members of the Audit and Governance Committee and the Resources and Performance Select Committee) recognise their individual responsibility to ensure that they have the necessary skills to complete their role effectively. The Section 151 Officer will ensure that elected members tasked with treasury management responsibilities, including those responsible for scrutiny, have access to training relevant to their needs and responsibilities. This will be reviewed regularly, to ensure up to date.

4.94 The Orbis Centre of Expertise for Treasury Management creates a central team of pooled expertise to provide robust services which are resilient to meet the changing service needs of partners.

4.95 Where Council staff do not have the knowledge and skills required, use is made of external advisers and consultants that are specialists in their field. This approach is more cost effective than employing such staff directly and ensures that the Council has access to knowledge and skills commensurate with its risk appetite.

Financial Implications

4.96 The budget for investment income and interest payable are set out in the 2025/26 budget and MTFS to 2029/30 and are based on interest rate forecasts (as set out above) and a mix of short-term borrowing and the existing long-term fixed rate debt portfolio. If actual levels of investments and borrowing, or actual interest rates, differ from those forecast, performance against budget will be correspondingly different.

Other options considered

4.97 The CIPFA Code does not prescribe any particular treasury management strategy for Local Authorities to adopt. The Section 151 Officer believes that the above strategy represents an appropriate balance between risk management and cost effectiveness. Some alternative strategies, with their financial and risk management implications, are listed below.

Alternative	Impact on income and expenditure	Impact on risk management
Invest in a narrower range of counterparties and/or for shorter times	Interest income will be lower	Lower chance of losses from credit related defaults, but any such losses may be greater
Invest in a wider range of counterparties and/or for longer times	Interest income will be higher	Increased risk of losses from credit related defaults, but any such losses may be smaller
Borrow additional sums at long-term fixed interest rates	Debt interest costs will rise; this is unlikely to be offset by higher investment income	Higher investment balance leading to a higher impact in the event of a default; however long-term interest costs may be more certain
Borrow short-term or variable loans instead of long-term fixed rates	Debt interest costs will initially be lower	Increases in debt interest costs will be broadly offset by rising investment income in the medium term, but long-term costs may be less certain
Reduce level of borrowing	Saving on debt interest is likely to exceed lost investment income	Reduced investment balance leading to a lower impact in the event of a default; however long-term interest costs may be less certain

Prudential Indicators 2024/25

1.1 The Local Government Act 2003 requires the Council to have regard to the Chartered Institute of Public Finance and Accountancy's Prudential Code for Capital Finance in Local Authorities (the Prudential Code) when determining how much money it can afford to borrow. The objectives of the Prudential Code are to ensure, within a clear framework, that the capital investment plans of Local Authorities are affordable, prudent and sustainable, and that treasury management decisions are taken in accordance with good professional practice. To demonstrate that the Council has fulfilled these objectives, the Prudential Code sets out the following indicators that must be set and monitored each year.

1.2 The Council has adopted the Chartered Institute of Public Finance and Accountancy's Treasury Management in the Public Services: Code of Practice.

Estimates of capital expenditure

1.3 The Council's planned capital expenditure and financing is summarised in Table 1. This prudential indicator is a summary of the Council's annual capital expenditure plans, both those agreed previously, and those forming part of this budget cycle.

Table 1 - Actual and estimated capital expenditure	2024/25 Projected £m	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m
		← -------------------- Estimated ------------------------ →				
Capital programme expenditure (incl pipeline)	356	402	355	248	192	197
Approved investment strategy spend	25	4	0	-	-	-
Financed By:						
- Government grants and third party contributions	99	127	116	85	109	150
- Capital Receipts	23	32	26	11	8	8
- Revenue and reserves	6	1	1	1	1	1
Net financing need for the year*	**253**	**246**	**211**	**152**	**73**	**38**

*Capital expenditure to be met by borrowing

The Council's borrowing need (the capital financing requirement)

1.4 Table 2 sets out the Council's estimated capital financing requirement (CFR). The CFR represents capital expenditure funded by external debt and internal borrowing and not by capital receipts, revenue contributions, capital grants or third party contributions at the time of spending. The CFR therefore measures a Council's underlying need to borrow for a capital purpose. Any capital expenditure which has not been funded from locally determined resources will increase the CFR. The CFR reduces by the Minimum Revenue Provision (MRP).

1.5 The MRP is a statutory annual revenue charge which reduces the borrowing need in a similar way to paying principal off a household mortgage.

1.6 The CFR includes any other long-term liabilities, e.g. PFI schemes, finance leases. Whilst these increase the CFR, and therefore the Council's borrowing requirement, these types of scheme include a borrowing facility and so the Council is not required to

separately borrow for these schemes and they therefore do not form part of the Council's underlying need to borrow.

1.7 The CFR is increasing over the MTFS period which results in an increase in external debt (after we have maximised internal borrowing) and therefore an increase in the revenue cost of borrowing.

1.8 This is reflected in an increased Operational Boundary and Authorised Limit as shown in Tables 4 and 5. Table 6 - Ratio of financing costs to net revenue stream, shows that the revenue cost of debt is an increasing but remains a relatively low proportion of our overall budget. The impact of funding the Capital Programme is built into the revenue budget and MTFS.

Table 2: Capital Financing Requirement (CFR)	2024/25 Projected	2025/26	2026/27	2027/28	2028/29	2029/30
		← ------------------- Estimated ------------------- →				
	£m	£m	£m	£m	£m	£m
Opening CFR	**1,503**	**1,718**	**1,919**	**2,079**	**2,174**	**2,187**
Movements:						
- Minimum revenue provision	(31)	(38)	(44)	(49)	(54)	(57)
- PFI & finance leases	(7)	(7)	(7)	(7)	(7)	(7)
- Net financing need	253	246	211	152	73	38
Total movement	214	201	160	95	12	(26)
Closing CFR	**1,718**	**1,919**	**2,079**	**2,174**	**2,187**	**2,161**

Gross borrowing and the capital financing requirement

1.9 In order to ensure that over the medium-term borrowing will only be for a capital purpose, the Council should ensure that its debt does not, except in the short-term, exceed the total of the CFR in the preceding year plus the estimates of any additional CFR for the current and next 2 financial years. This allows some flexibility for early borrowing in advance of need, but ensures that borrowing is not undertaken for revenue purposes. This is a key indicator of prudence.

1.10 Total debt is expected to remain below the CFR during the forecast period.

Table 3: Gross Borrowing	2024/25 Projected	2025/26	2026/27	2027/28	2028/29	2029/30
		← ------------------- Estimated ------------------- →				
	£m	£m	£m	£m	£m	£m
Gross Borrowing	767	998	1,206	1,374	1,476	1,496
CFR	1,718	1,919	2,079	2,174	2,187	2,161

The Council's operational boundary for external debt

1.11 Table 4 sets out the Council's operational boundary, an indicator against which to monitor its external debt position. It is based on the Council's estimate of the most likely (i.e. prudent but not worst case) scenario for external debt. It links directly to the Council's estimates of capital expenditure, the CFR and cash flow requirements and is a key management tool for in-year monitoring.

1.12 Within the operational boundary, figures for borrowing and other long-term liabilities are separately identified. Other long-term liabilities comprise finance lease, PFIs and other liabilities that are not borrowing but form part of the Council's debt position.

1.13 The operational boundary is not a limit and actual borrowing could vary around this boundary for short periods during the year. It should act as an indicator to ensure the

authorised limit is not breached. The operational boundary increases over the MTFS period to reflect an increasing underlying need to borrow linked to the Capital Programme. We monitor against the indicator throughout the year.

Table 4: Operational Boundary	2024/25 Agreed £m	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m
		← -------------------- Estimated ----------------------- →				
Borrowing	1,091	1,404	1,613	1,750	1,790	1,775
PFI & finance leases	88	81	74	67	59	52
Total	**1,179**	**1,485**	**1,687**	**1,816**	**1,849**	**1,827**
Estimated external debt	998	1,206	1,374	1,476	1,496	1,477

The Council's authorised limit for external debt

1.14 Table 5 sets out the Council's authorised limit for external debt. This key prudential indicator represents a control on the maximum level of borrowing. It is a statutory limit determined under section 3(1) of the Local Government Act 2003 and represents a limit beyond which external debt is prohibited. It is the maximum amount of debt that the Council can legally owe.

1.15 The Government retains an option to control either the total of all Councils' plans, or those of a specific Council, although this power has not yet been exercised since the introduction of the Prudential Code.

1.16 The Authorised limit provides headroom over and above the operational boundary for unusual cash movements and potential additional borrowing to meet the ambitions of the Council in respect of its investment strategy.

1.17 As with the operational boundary, the limit separately identifies borrowing from other long-term liabilities such as finance leases and PFIs. The authorised limit increases over the MTFS period to reflect an increasing underlying need to borrow linked to the Capital Programme.

Table 5: Authorised Limit	2024/25 Agreed £m	2025/26 £m	2026/27 £m	2027/28 £m	2028/29 £m	2029/30 £m
		← -------------------- Estimated ----------------------- →				
Borrowing	1,183	1,602	1,853	2,023	2,084	2,074
PFI & finance leases	88	81	74	67	59	52
Total	**1,272**	**1,683**	**1,926**	**2,090**	**2,143**	**2,125**
Estimated external debt	998	1,206	1,374	1,476	1,496	1,477

Estimated ratio of gross financing costs to net revenue stream

1.18 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.

	2023/24 Actual	2024/25 Forecast	2025/26 Budget	2026/27 Budget	2027/28 Budget	2028/29 Budget	2029/30 Budget
Proportion of gross financing costs to net revenue budget	5.5%	5.0%	5.6%	6.2%	6.7%	7.1%	7.4%

Estimated ratio of net financing costs to net revenue stream

1.19 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 net financing costs (net of investment income).

	2023/24 Actual	2024/25 Forecast	2025/26 Budget	2026/27 Budget	2027/28 Budget	2028/29 Budget	2029/30 Budget
Proportion of net financing costs to net revenue budget	3.8%	3.4%	4.1%	4.7%	5.2%	5.6%	5.9%

1.20 The revenue implications of potential, yet to be identified, investment opportunities that meet the Council's long-term capital strategy criteria, will be funded from the investment returns of such investments. If there is a delay in the realisation of sufficient returns, then costs will be funded from the Council's Revolving Infrastructure & Investment Fund reserve.

<u>Net income from commercial and service investments to net revenue stream</u>

1.21 This is an indicator of affordability and highlights the net financial impact on the authority of its entire non-treasury investment income.

	2023/24 Actual	2024/25 Forecast	2025/26 Budget	2026/27 Budget	2027/28 Budget	2028/29 Budget	2029/30 Budget
Total net income service and commercial investments	19	19	19	19	19	19	19
Proportion of net revenue budget	1.7%	1.6%	1.5%	1.5%	1.5%	1.5%	1.5%

TMS Annex 2 - Arlingclose Economic & Interest Rate Forecast – November 2024

Underlying assumptions

2.1 As expected, the Bank of England Monetary Policy Committee (MPC) cut Bank Rate to 4.75% in November in an 8-1 vote. However, the outlook for monetary policy has changed following the new government's fiscal plans, as delivered in the recent Budget.

2.2 The Budget contained measures that will boost demand, in a constrained supply environment, while pushing up direct costs for employers. The short to medium-term inflationary effects of the Budget require a change to our Interest Rate Forecast.

2.3 UK GDP recovered well in H1 2024 from technical recession, but underlying growth appears relatively subdued. However, the Budget will significantly boost government spending over the short-term, with few offsetting measures to subdue household demand, so GDP growth is likely to rise relatively steeply.

2.4 Private sector wage growth has eased to 4.8% yet remains high, while services inflation continues to hold above pre-pandemic levels. The increase in employers' NICs, minimum and public sector wage levels could have wide ranging impacts on private sector employment demand and costs, but the near-term impact will likely be inflationary as these additional costs get passed to consumers.

2.5 CPI inflation was below the 2% target in September but will rise a little by year-end as energy price declines from the previous year fall out of the annual comparison. The Bank of England (BoE) estimates the Budget impact will see the CPI rate at 2.7% by year end 2025 and remain over target in 2026, as opposed to the prior projection of inflation easing back to and then below target by this point.

2.6 The MPC re-emphasised the gradual move to easing monetary policy, and we now believe the Budget measures have both reduced the pace of Bank Rate cuts and increased the low for this loosening cycle (although downside risks remain in the medium term).

2.7 The increase in borrowing, rise in inflation and shallower path for Bank Rate projected by the Office for Budget Responsibility (OBR) raised gilt yields. The material change in rate expectations means that yields will be generally higher in the post-Budget world.

2.8 US government yields have risen following Donald Trump's and Republican victories in the US elections. Trump has run on a platform of policies that appear inflationary, calling into question the extent of policy loosening required from the Federal Reserve (which was already uncertain given continued solid US growth data). Higher US yields could also support higher UK yields.

Forecast

2.9 The Bank Rate was cut to 4.75% in November 2024.

2.10 The MPC will continue to lower Bank Rate to reduce the restrictiveness of monetary policy, but more slowly and to a higher level. We see another rate cut in February 2025, followed by one cut per quarter, in line with Monetary Policy Report publication, to a low of 3.75%.

2.11 Long-term gilt yields have risen to reflect both UK and US economic, monetary and fiscal policy expectations, and increases in bond supply. Volatility is likely to remain

elevated as the market digests incoming data for clues around the impact of policy changes.

2.12 This uncertainty may also necessitate more frequent changes to our forecast than has been the case recently.

2.13 Upside risks to inflation over the next 12 months could limit the extent of monetary easing, but we see the risks as broadly balanced over the medium term.

	Current	Dec-24	Mar-25	Jun-25	Sep-25	Dec-25	Mar-26	Jun-26	Sep-26	Dec-26	Mar-27	Jun-27	Sep-27
Official Bank Rate													
Upside risk	0.00	0.00	0.25	0.50	0.50	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75
Central Case	4.75	4.75	4.50	4.25	4.00	3.75	3.75	3.75	3.75	3.75	3.75	3.75	3.75
Downside risk	0.00	0.00	-0.25	-0.25	-0.50	-0.50	-0.75	-0.75	-0.75	-0.75	-0.75	-0.75	-0.75
3-month money market rate													
Upside risk	0.00	0.00	0.25	0.50	0.50	0.75	0.75	0.75	0.75	0.75	0.75	0.75	0.75
Central Case	4.95	4.80	4.60	4.35	4.10	3.90	3.85	3.85	3.85	3.85	3.85	3.85	3.85
Downside risk	0.00	0.00	-0.25	-0.25	-0.50	-0.50	-0.75	-0.75	-0.75	-0.75	-0.75	-0.75	-0.75
5yr gilt yield													
Upside risk	0.00	0.60	0.70	0.80	0.90	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Central Case	4.30	4.20	4.10	4.05	3.95	3.90	3.90	3.90	3.95	4.00	4.05	4.05	4.05
Downside risk	0.00	-0.40	-0.50	-0.60	-0.65	-0.65	-0.65	-0.65	-0.65	-0.65	-0.65	-0.65	-0.65
10yr gilt yield													
Upside risk	0.00	0.60	0.70	0.80	0.90	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Central Case	4.41	4.40	4.35	4.35	4.35	4.30	4.30	4.30	4.35	4.35	4.35	4.35	4.35
Downside risk	0.00	-0.40	-0.50	-0.60	-0.65	-0.65	-0.65	-0.65	-0.65	-0.65	-0.65	-0.65	-0.65
20yr gilt yield													
Upside risk	0.00	0.60	0.70	0.80	0.90	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Central Case	4.84	4.80	4.75	4.70	4.65	4.65	4.65	4.65	4.65	4.65	4.65	4.65	4.65
Downside risk	0.00	-0.40	-0.50	-0.60	-0.65	-0.65	-0.65	-0.65	-0.65	-0.65	-0.65	-0.65	-0.65
50yr gilt yield													
Upside risk	0.00	0.60	0.70	0.80	0.90	1.00	1.00	1.00	1.00	1.00	1.00	1.00	1.00
Central Case	4.35	4.50	4.45	4.40	4.35	4.35	4.35	4.35	4.35	4.35	4.35	4.35	4.35
Downside risk	0.00	-0.40	-0.50	-0.60	-0.65	-0.65	-0.65	-0.65	-0.65	-0.65	-0.65	-0.65	-0.65

PWLB Standard Rate = Gilt yield + 1.00%
PWLB Certainty Rate = Gilt yield + 0.80%
PWLB HRA Rate = Gilt yield + 0.40%
National Wealth Fund (NWF) Rate = Gilt yield + 0.40%

TMS Annex 3 - Investment & Debt Portfolio Position as at 30 November 2023

	Actual Portfolio £m	Interest Rate %
External borrowing:		
Public Works Loan Board	458	3.68
Market	10	5.00
Local Authorities (Incl. Surrey Police)	513	5.05
Other	12	0.00
Total external borrowing	**993**	
Other long-term liabilities:		
Private Finance Initiative	77	
Total other long-term liabilities	**77**	
Total gross external debt	**1,070**	
Treasury investments:		
Money Market Funds	68	4.79
Total treasury investments	**68**	
Net debt	**1,002**	

TMS Annex 4 - Glossary of Terms

CFR – Capital Financing Requirement

CIPFA – Chartered Institute of Public Finance Accountancy

CPI – Consumer Price Index

DLUHC – Department for Levelling Up, Housing and Communities

DMO – Debt Management Office

ECB – European Central Bank

GDP – Gross Domestic Product

LB – Liability Benchmark

MMF – Money Market Fund

MPC – Monetary Policy Committee

MRP – Minimum Revenue Provision

PWLB – Public Works Loan Board

TMSS – Treasury Management Strategy Statement

Annex F - Annual Minimum Revenue Provision (MRP) Policy Statement 2025/26

1. When the Council finances capital expenditure by debt (borrowing), it must put aside resources to repay that debt in future years. The amount charged to the revenue budget for the repayment of debt is known as Minimum Revenue Provision (MRP). The Council is required by statute to make a prudent provision for the repayment of its debt. It is also required to 'have regard' to guidance on how to calculate this provision, issued by the Ministry of Housing, Communities and Local Government, most recently in 2024.

2. The broad aim of the guidance is to ensure that capital expenditure is financed over a period that is reasonably commensurate with that over which the capital expenditure provides benefits.

3. In developing this policy statement, the Council is satisfied that the guidelines for their annual amount of MRP will result in it making a prudent provision.

4. MRP is calculated by reference to the capital financing requirement (CFR) which is the total amount of past capital expenditure that has yet to be permanently financed, noting that debt must be repaid and therefore can only be a temporary form of funding. The CFR is calculated from the Authority's balance sheet in accordance with the Chartered Institute of Public Finance and Accountancy's Prudential Code for Capital Expenditure in Local Authorities, 2021 edition.

5. Where capital expenditure was incurred before 1 April 2008, the guidance suggests writing down the remaining Capital Financing Requirement by providing MRP of 4% per annum. The Council agreed in 2016/17 to write this amount off over the next 50 years, resulting in the whole balance being provided for over a finite period and far sooner than under the 4% reducing balance method.

6. As suggested in the guidance, for capital expenditure incurred on or after 1 April 2008 and funded through borrowing, the Council will calculate MRP by charging expenditure over the expected useful life of the relevant assets, on an annuity basis. MRP will be first charged in the year following the date that an asset becomes operational.

7. For the following types of capital expenditure, the Council has determined that an alternative methodology for determining the annual MRP charge should be adopted:

   - For assets acquired by finance leases or the Private Finance Initiative, MRP will be determined as being equal to the element of the rent or charge that goes to write down the balance sheet liability, or over the life of the asset.

   - For capital expenditure on loans to third parties which were made primarily for financial return rather than direct service purposes, MRP will be charged in accordance with the policy for the assets funded by the loan, including where appropriate, delaying MRP until the year after the assets become operational. This MRP charge will be reduced by the value any repayments of loan principal received during in the year, with the capital receipts so arising applied to finance the expenditure instead.

   - For capital expenditure on loans to third parties which were made primarily for service purposes, the Authority will make nil MRP except as detailed below for expected credit losses. Instead, the Authority will apply the capital receipts arising from the repayments of the loan principal to finance the expenditure in the year they are received.

   - For capital loans made on or after 7th May 2024 where an expected credit loss is recognised during the year, the MRP charge in respect of the loan will be no lower

than the loss recognised. Where expected credit losses are reversed, for example on the eventual repayment of the loan, this will be treated as an overpayment.

- For capital loans made before 7th May 2024 and for loans where expected credit losses are not applicable, where a shortfall in capital receipts is anticipated, MRP will be charged to cover that shortfall over the remaining life of the assets funded by the loan.

- MRP for investment property purchases is based on an estimated useful life of 50 years, on an annuity basis, in order to appropriately match MRP to the period of time that the assets are expected to generate a benefit to the Council. This is in recognition that these assets are held for income generation purposes and that the Council holds a saleable asset, the capital receipt from which will be used to repay any outstanding debt when sold.

- The Council will determine MRP on equity investments based on a 20 year life. However, for equity investments in asset backed companies, a 50 year life will be assumed to match the Council's policy for investment assets.

8. The Council reserves the right to determine alternative MRP approaches in particular cases, in the interests of making prudent provision, where this is material, taking account of local circumstances, including specific project timetables and revenue-earning profiles.

9. Capital expenditure incurred during 2025/26 will not be subject to a MRP charge until 2026/27 or later.

10. Capital receipts - proceeds from the sale of capital assets are classed as capital receipts and are typically used to finance new capital expenditure. Where the Authority decides instead to use capital receipts to repay debt and hence reduce the CFR, the calculation of MRP will be adjusted as follows:

- Capital receipts arising on the repayment of principal on capital loans to third parties will be used to lower the MRP charge in respect of the same loans in the year of receipt, if any.

- Capital receipts arising on the repayment of principal on finance lease receivables will be used to lower the MRP charge in respect of the acquisition of the asset subject to the lease in the year of receipt, if any.

- Capital receipts arising from other assets which form an identified part of the Authority's MRP calculations will be used to reduce the MRP charge in respect of the same assets over their remaining useful lives, starting in the year after the receipt is applied.

- Any other capital receipts applied to repay debt will be used to reduce MRP in 10 equal instalments starting in the year after receipt is applied.

11. Each year a new MRP statement will be presented.

Annex H – Consultation and Engagement

1.1 Introduction

1.1 Between August and December 2024, the Council conducted an engagement and consultation exercise with residents, organisations and Members to inform the development of the budget for 2025/26 and the Medium-Term Financial Strategy (MTFS). This activity supports one of the Council's priority objectives to have empowered and thriving communities where more people participate, engage and have a say in how things are done on matters that impact them and where they live.

1.2 While this section of the report summarises the insights gathered from consultation and engagement on the draft budget, council services regularly consult and engage with residents and other stakeholders throughout the year and on an ongoing basis to inform their services.

1.3 The objectives of this consultation and engagement activity were to:
- Provide decision-makers with insight from residents and partners to inform budget setting for 2025/26 and beyond.
- Enhance transparency and accountability around budget decisions, including proposals around additional investment and efficiencies.
- Promote inclusive and representative engagement by actively involving marginalised and underrepresented groups.

1.4 This work was split into two phases.

- The first phase of engagement took place in the summer of 2024 with residents and stakeholders asked to share their views on what their most important priority outcomes were, how the budget should be allocated, approaches to balancing the budget, and conditions for supporting a council tax increase. Data was gathered from nearly 1,600 stakeholders using a range of methods:
    a. An open survey on the Surrey Says platform (28 August – 30 September 2024) with 1,495 respondents.
    b. Community events and reference groups, engaging nearly 90 residents.
    c. Promotion via social media, the Surrey Matters newsletter, and local council members.
- The second phase was a consultation on the Council's draft budget after this was approved by the Cabinet at its meeting on 26 November 2024. The purpose of this exercise was to provide residents and other stakeholders with information on the key proposals included, and to seek their views on the financial efficiencies that the Council is pursuing. Data was gathered from 718 stakeholders, of which 689 were residents.

1.5 Across both phases, over 2,200 stakeholders have shared their views including residents, partner organisations from the statutory and Voluntary, Community and Social Enterprise (VCSE) sector, businesses and elected Members.

2. Methodology

2.1 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 does mean that the results illustrate the views of those who chose to take part but does not provide data representative of Surrey residents.

2.2 Across both exercises, we included targeted promotion of the survey to invite responses from groups that are typically underrepresented in these types of open exercises. Additionally, an information pack, developed in EasyRead and Large Print formats, was published alongside the survey to provide information to stakeholders on the investment proposals and efficiencies in each area of the council's spending.

2.3 Both surveys were promoted through the Surrey Matters E-Newsletter, social media, and through all libraries across Surrey. Surrey County Council Members, Community Link Officers and other Engagement Officers were also encouraged to promote the survey with local residents, businesses and stakeholders in their areas.

2.4 Members were engaged throughout the process via a range of meetings including informal and formal Select Committees and all-Member briefings. These sessions provided updates on the budget position and proposals with investment measures and efficiencies outlined and explained alongside contextual information. Select Committees had the opportunity to scrutinise proposals and undertake deep-dive exploratory exercises on two areas within their remit, making recommendations to Cabinet to inform the developing budget.

Phase 1

2.5 In the first phase, which ran from 28 August to 30 September 2024, data was gathered from nearly 1,600 stakeholders using:
- An open survey on the Surrey Says platform which received 1,495 responses. Respondents were self-selecting, which means the results are not 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.

2.6 During this phase, 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:
    - i.   Better public transport connections for easier, more predictable journeys
    - ii.   Better roads and pavements
    - iii. Enabling people of all ages to access education and skills
    - iv.   Making our communities safer
    - v.   Promoting better health and wellbeing for all residents
    - vi.   Tackling climate change and protecting Surrey's countryside and biodiversity

     vii.   Providing care for adults and children who need us most

    viii.   Reducing waste and increasing recycling

     ix.   Reinvigorating town centres and high streets

     x.   Stronger community relations through local community networks and support

     xi.   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.

Phase 2

2.7 In the second phase consultation, which ran from 26 November to 31 December 2024, data was gathered from 718 stakeholders using:

- An open survey on the Surrey Says platform which began on 26 November, after the Cabinet approved the draft Budget, closing on 31 December. The 718 respondents were self-selecting, which means the results are not representative of the whole of Surrey's population.
- Attendance at the VCSE Alliance Disability Conference.
- Promotion via social media, the Surrey Matters website, newsletter, and local council Members.

2.8 During this phase, the Council asked for insight from stakeholders on:

- Support or opposition of the proposals to balance the budget.
- Anything that should be considered in the implementation of these proposals to deliver better outcomes for Surrey.
- Anything else residents wanted to share with us about the draft budget.

3. Results

Phase 1 results
Priority outcomes

3.1 Respondents to the first phase of engagement prioritised the following four outcomes for Surrey (from the list of 11 outcomes):

- 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%)

3.2 Younger respondents were less likely to prioritise roads and pavements than older respondents. Community safety was most important in Runnymede, Spelthorne, Tandridge and Mole Valley.

3.3 At community events, the focus was on:

- Providing care for adults and children who need us most
- Promoting better health and wellbeing for all residents
- Enabling people of all ages to access education and skills (especially SEN provision)

- Better public transport connections for easier, more predictable journeys
- Making our communities safer

3.4 Respondents 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.

Use of resources

3.5 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.

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

Balancing the budget

3.7 Open survey respondents were asked about approaches to balancing the budget. These included:
- 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

3.8 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 – scenario

3.9 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

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

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

3.12   38% of respondents opposed any Council Tax increase under any circumstances,
while 45% recognised legitimate circumstances for a rise.

Phase 2 results
Support for proposals to balance the budget
3.13   Respondents were asked to select one answer to this question to indicate whether or
not they supported our proposals to close the budget gap for 2025/26. Overall, 350 (49%)
of respondents either 'strongly support' or 'somewhat support' the Council's proposals to
close the budget gap. Conversely, 161 respondents (23%) either 'strongly oppose' or
'somewhat oppose' the Council's proposals. A further 163 respondents (23%) selected
'neutral' and the remaining 37 respondents (5%) selected 'don't know.

3.14   The chart below illustrates the level of support and opposition for proposals to close
the budget gap.
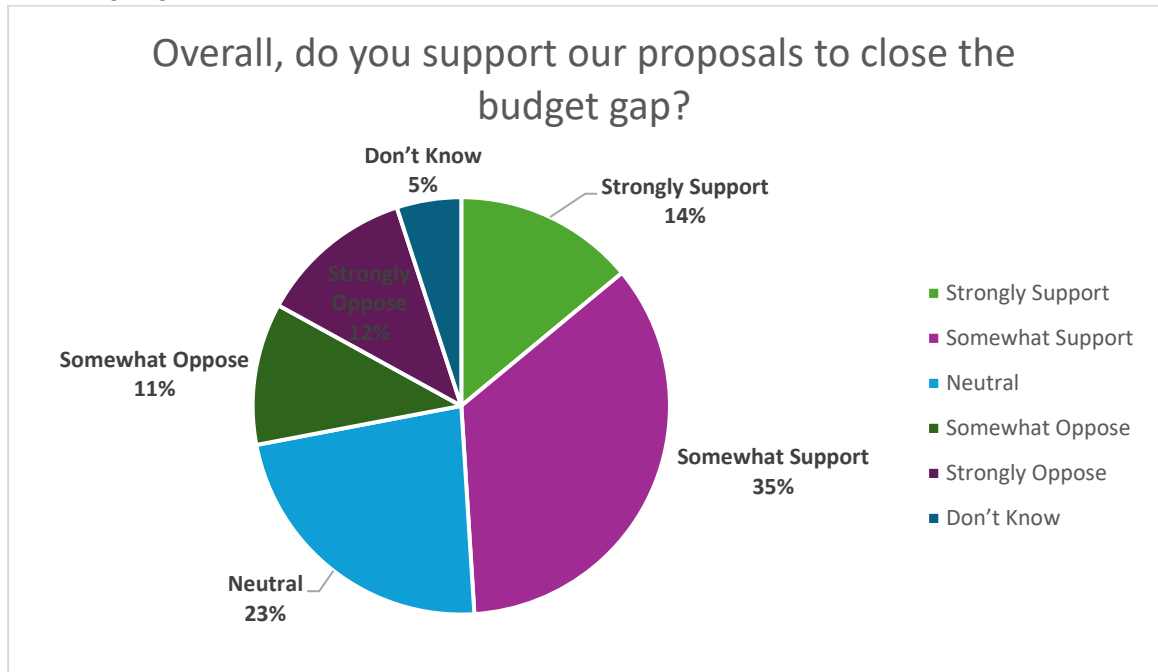
3.15   Further analysis of the data shows that support for the proposals increase with age.[1]
41% of those aged 34 and under support the proposals compared to 58% of those aged

---

[1] The term 'support' describes those who selected either 'strongly support' or 'somewhat support' in their
response.

65 and over. Conversely, opposition to the proposals decreases with age. 29% of those aged 34 and under opposed the proposals compared to 13% of those aged 65 and over.[2]

3.16   Support for the proposals is highest (62%) from those with a household income of more than £30,000 and less than £80,000. 43% of those with a household income of £30,000 and less support the proposals. 49% of those with a household income of more than £80,000 support the proposals, which is in line with the overall results.

3.17   Respondents with a long-standing illness or disability have slightly lower levels of support for the proposals (42%) compared to the overall results (49%).

3.18   Support was slightly higher among female respondents (53%) compared to male respondents (48%).

Considerations for implementation

3.19   After responding to the first question, 401 respondents (56%) provided a comment to explain why they supported or opposed the budget. Stakeholders were concerned about:

- The nature of proposed efficiencies
    - *"The proposals are an ambition and not a plan."*
    - *"Not sure 'transformation programmes' and 'management restructuring' actually happen and work."*
- Council Tax
    - *"Council tax is already too high so increasing that won't increase revenue as you will have an increasing amount of people not being able to afford to pay it"*
- Social Care
    - *"We need more money for essentials like adult social care."*
    - *"I'm concerned by further 'efficiencies' in social care that will impact the most vulnerable people, families and unpaid carers in our communities."*
- Trust in the Council
    - *"I have little faith in the council to address issues within the council."*
    - *"Why should I trust anything the council says or does?"*
- Support for Vulnerable Groups
    - *"THERE NEEDS TO BE MORE SUPPORT FOR PEOPLE WHO HAVE LEARNING DISABILITIES!!!"*
    - *"Children, families and lifelong learning needs to be the top priority."*

3.20   Respondents were then asked to share anything that they believed should be considered in the implementation of these budget proposals to deliver better outcomes for Surrey. 439 (61%) respondents provided comments to this question and shared their views on different services such as:

---

[2] The base for respondents aged 34 and under was particularly small. Only 44 of 718 respondents were in this group.

- Highways and infrastructure
    - *"Reduce spend in all service areas and only spend on maintaining the existing Highways assets."*
    - *"Road surfaces are appalling with damage caused to vehicles due to poor maintenance and management."*
- Social care and health
    - *"Cutting costs in adult social care/wellbeing and health is counter-intuitive since if people's health is improved, the cost of health reduces."*
- Environmental concerns
    - *"The countryside - protecting our rural spaces and biodiversity is the number one priority for me."*
- Education and lifelong learning
    - *"Children with special needs should be given enough support. Students who struggle in class should be evaluated to see which type of support can be given."*
    - *"Schools! There is no money and no support! It's getting ridiculous and teachers are leaving the profession in droves."*
- Community and Voluntary Sector
    - *"The voluntary sector plugs the gaps which are growing bigger as councils withdraw their funding and effectively provides services for less."*

Other comments

3.21   The final question of the survey invited any other comments from respondents on the draft budget. 363 respondents (51%) shared their views on:

- Budget allocation and cuts
    - *"Costs can be saved by looking at the management structure in the council - there seem to be multiple layers of management, which is completely unnecessary and not cost effective."*
- Highways and grass verges
    - *"Please sort out potholes as a priority. Also please clean up fallen leaves which get wet then freeze and become treacherous."*
- Social care and SEND
    - *"We need more money for essentials like adult social care."*
    - *"SEND must be the top priority."*
- Transparency and communication
    - *"This seems like a box ticking exercise as only people with a financial background could possibly understand the budget."*
    - *"Will we get feedback about the eventual outcome about this?"*
- Environmental concerns
    - *"I am unclear about how, for example, Surrey Fire and Rescue are intending to deal with the changing nature of fire threats due to climate change (heathland fires for example) and technology."*

3.22   A more detailed analysis of responses is currently being undertaken with the results being shared with services for implementation in 2025/26 and to inform the development of proposals to be brought forward for 2026/27.

4. Stakeholder Profile (Demographics, Types of Respondents etc.)

4.1 Between 26 November and 31 December 2024, there were 718 responses to the draft budget consultation for 2025/26.

4.2 Of the 718 responses, 97% respondents were Surrey residents. Other stakeholders included local businesses, public sector partners, voluntary, community and social enterprise (VCSE) organisations, and elected Members. The data presented below excludes respondents or did not answer the questions.

Respondent type	Number of respondents	Percentage (%) of all consultation respondents
I am a Surrey resident	689	97%
I am a Surrey County Council employee	49	7%
I represent or own a local business	27	4%
I work in Surrey but live elsewhere	16	2%
I am responding on behalf of a voluntary, community or faith organisation (please specify below)	10	1%
I am a councillor	8	1%
I am responding on behalf of a public sector partner (e.g. NHS, police, District or Borough Council) (please specify below)	2	0.3%
I am an MP	0	0%
Other (please specify below)	25	4%

Base: 713. NB Respondents were able to select more than one option, so percentages add up to more than 100.

4.3 Of those who responded to the consultation, the greatest number of responses came from Guildford borough (91). The lowest number of responses came from residents living or working in Runnymede (30).

Which district or borough in Surrey do you live or work in?

Guildford	91
	87
Reigate and Banstead	83
	81
Woking	79
	73
Surrey Heath	62
	46
Epsom and Ewell	39
	34
Runnymede	30

■ Number of responses

Base:
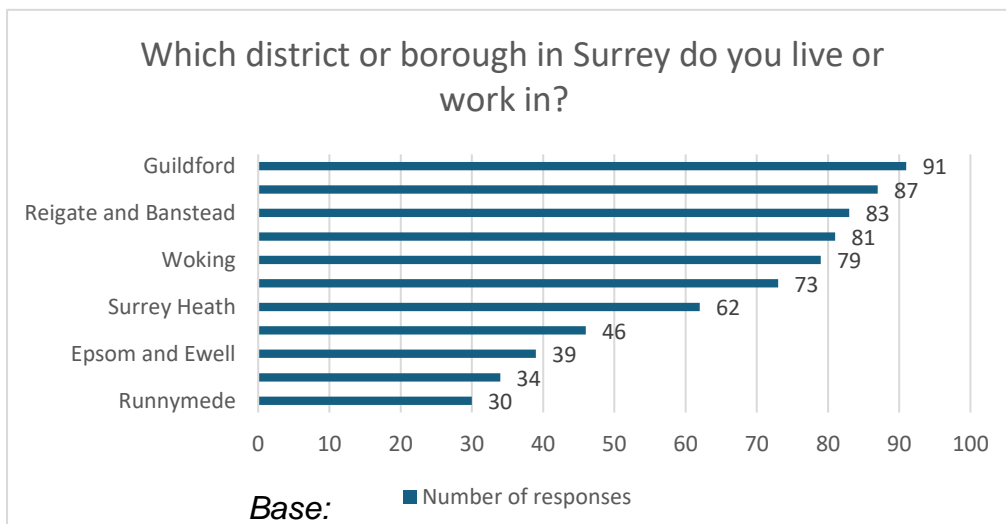
4.4 Residents aged between 55 and 64 (170 or 24%) were most likely to respond to the draft budget consultation survey. The lowest response rate was from residents aged between 18 and 24 (7 or 1%).

What age group are you in?

Age group	Number of responses
18-24	7
25-34	37
35-44	77
45-54	148
55-64	170
65-74	154
75-84	73
85+	4
Prefer not to say	43

■ Number of responses
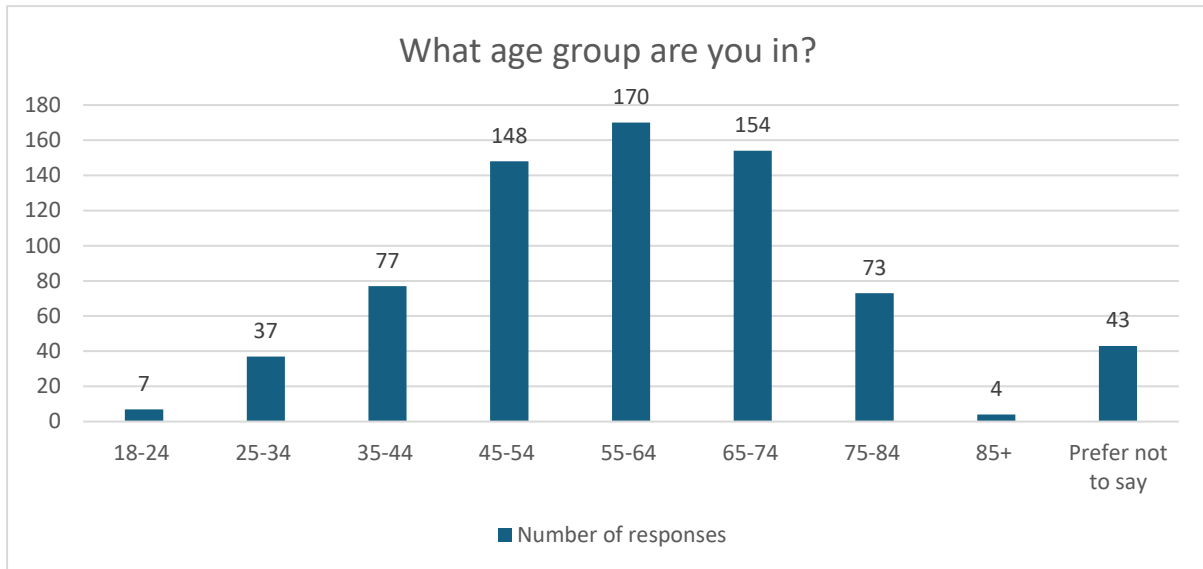
4.5 46 (77%) respondents did not have a long-standing illness or disability (physical or mental impairment that has a 'substantial' and 'long-term' negative effect on your ability to do normal daily activities). 100 (14%) respondents said they did have a long-standing illness or disability. This means people with a disability are well represented in the responses against the Surrey disabled population of 13.8%.[3]

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)?

	Number of responses
No	546
Yes	100
Prefer not to say	66

■ Number of responses
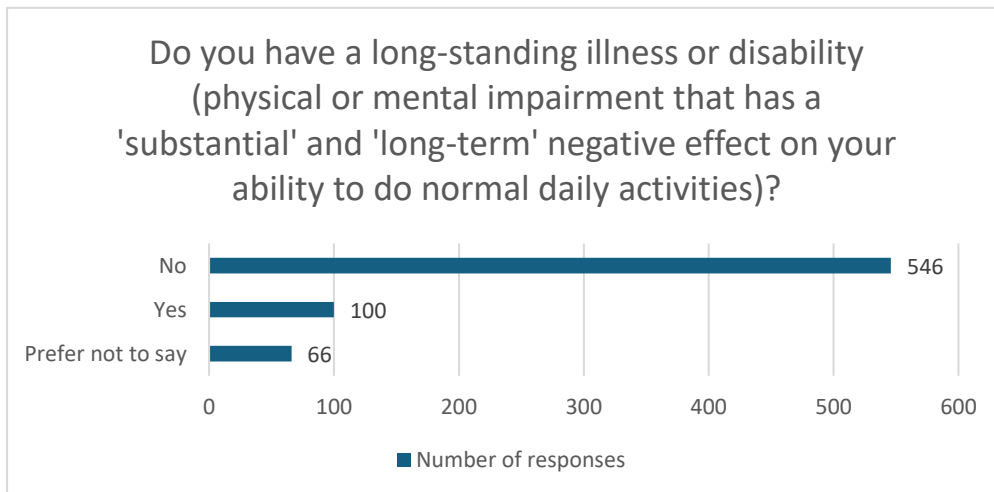
4.6 There were slightly more female respondents (338 or 48%), than male (294 or 41%). 78 (11%) respondents preferred not to declare the sex they were assigned at birth. Of those that responded, only 3 residents declared that their current gender identity was not the same as the sex they were assigned at birth.

---

[3] 2021 Census: Disability | Surrey-i – Disabled under the Equality Act

4.7 In terms of ethnicity, 81% of respondents said they were from a White ethnic background, which is slightly more than, but not statistically representative of, Surrey's wider population.[4] People of mixed ethnicity and Asian or Asian British backgrounds were the next most represented at just over 3% for each ethnicity – those of Asian or Asian British backgrounds were underrepresented compared to the wider population. 13% of respondents said they would prefer not to disclose their ethnic identity.

Ethnic background	Number of respondents	Percentage (%) of respondents
White – British/English/Northern Irish/Scottish/Welsh, Irish, Gypsy or Irish Traveller, Other	572	81%
Mixed/multiple ethnic groups – White and Black Caribbean, White and Black African, White and Asian, Other	19	3%
Asian/Asian British – Indian, Pakistani, Bangladeshi, Chinese, Other	21	3%
Other ethnic group – Arab, Other	4	1%
Black/African/Black British – African, Caribbean, Other	3	0.4%
Prefer not to say	91	13%

Base: 710

4.8 When asked how they had heard about the consultation, most respondents were prompted to participate through the Surrey Matters e-newsletter (311 or 44%). 256 (36%) respondents had heard about the consultation through social media, while others heard about it through more traditional methods, such as word of mouth (18 or 3%) or local news (24 or 3%).

4.9 97 respondents said they had learned of the consultation through other channels. For example, some via email and others through promotion by local voluntary, community and faith organisations.

---

[4] Census 2021: Ethnic Group | Surrey-i

How did you hear about this consultation?

	Number of responses
Surrey Matters e-newsletter	311
Social media	256
Local news	24
Word of mouth	18
Libraries	11
Other	96
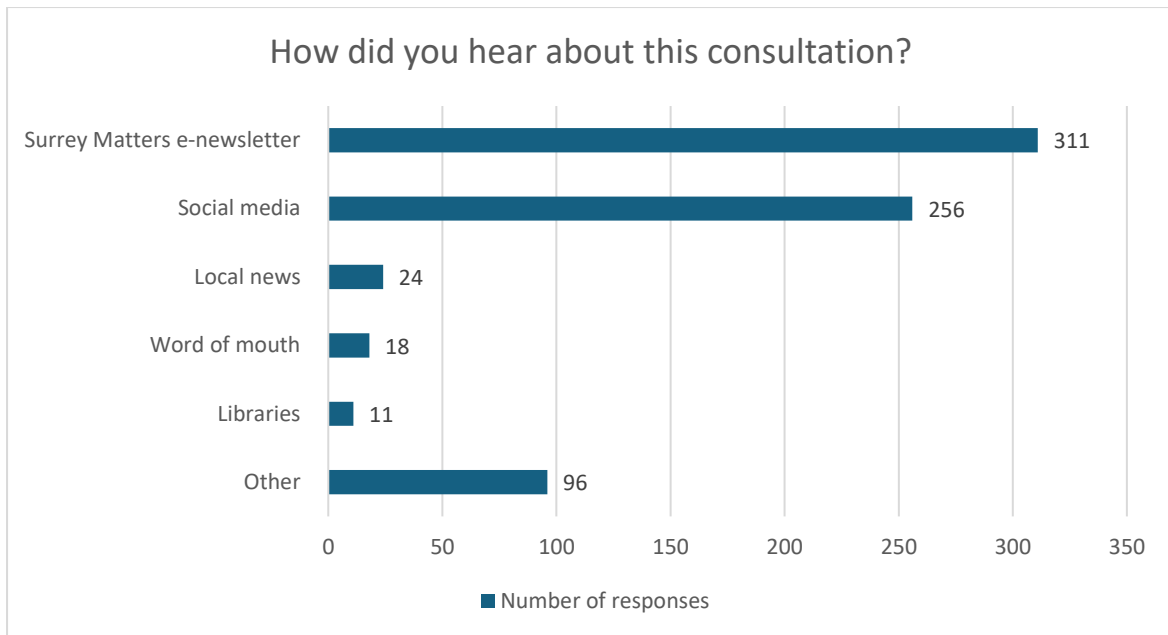
Base: 706. NB Respondents were able to select more than one option, so percentages add up to more than 100.

This page is intentionally left blank

Annex I - Surrey County Council Budget 2025/26 – Cumulative Equality Impact Assessment

1. This report analyses potential equality impacts on residents and Surrey County Council staff with protected characteristics of the 2025/26 budget. It also includes proposed actions to maximise positive impacts from the efficiency proposals and minimise negative ones, including plans for mitigation.

2. Through our aspiration to ensure no-one is left behind, as well as our commitment to equality, diversity and inclusion (EDI), the council is committed to supporting all residents to have the same chances for a high quality of life and championing the most vulnerable living in Surrey. This includes proactively seeking opportunities to eliminate discrimination and co-designing services with residents and partners, so they are inclusive, accessible and fair.

3. Where a budget efficiency has the potential to impact residents' or staff experience, some Equality Impact Assessments (EIAs) have been made available on the council's website for Members to review where plans are further ahead with their development. Some proposals are at a formative stage, and EIAs will be available at the point final decisions need to be taken on them.

4. This paper must be read in conjunction with the 2025/26 Final Budget and Medium-Term Financial Strategy 2025/26 – 2028/29 (MTFS) and the Cabinet report of 28 January 2025. This report will support Members to pay due regard to the equality implications of the proposed budget for 2025/26, as set out in our obligations under Section 149 of the Equality Act (2010).

Summary

5. All available EIAs for 2025/26 budget efficiency proposals have been analysed to understand potential **positive** and **negative** impacts on both **residents** and **staff** with protected characteristics, particularly where they may be impacted by multiple efficiency proposals.

6. The following groups have been identified as potentially being both positively and negatively impacted the most:

   - Older adults and their carers, adults of all ages who are disabled, are experiencing mental health difficulties or have learning disabilities and their carers.
   - Children and young people, including those with special educational needs and disabilities (SEND), and their families.
   - Surrey County Council Officers, particularly women, working in support services and those from lower-income or socio-economically disadvantaged households.

7. The budget overall will also have significant **positive impacts**, particularly where it focuses on expansion of some services, or changes to service that focus on prevention and early intervention. Despite the challenging financial climate facing the council, we will continue prioritising investment decisions that are targeted at supporting the most vulnerable of Surrey's residents, so no-one is left behind.

8. For any potential **negative impacts**, a summary of mitigating activity is provided in paragraph 23. These include measures focusing on ensuring engagement and consultation with service users and staff that will likely be impacted, as well as activity that prioritises early-intervention/ prevention approaches. We will also engage partner organisations when working to implement any efficiencies or planned activity where their support and insight in delivery will be useful.

Our Duties

9. This analysis supports continued due regard to the Public Sector Equality Duty under section 149 of the Equality Act 2010 (and the updated guidance published on the 18th December 2023, under the previous government), which requires local authorities 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
- Removing or minimising disadvantages suffered by people due to their protected characteristics
- Taking steps to meet the needs of people from protected groups where these are different from the needs of other people
- Encouraging people from protected groups to participate in public life or in other activities where their participation is disproportionately low

10. Other relevant legislation includes:

- Section 11 of the Children Act 2004, which places a duty on the council to ensure service functions, and those contracted out to others, are discharged having regard to the need to safeguard and promote the welfare of children.
- Section 343AE of the Armed Forces Act (2021)[1] where we are required to show due regard to the principles of the Armed Forces Covenant when exercising certain statutory functions in the fields of healthcare, education and housing for current and former members of the armed forces, and their families.

11. Members must read each individual EIA in full and take them into consideration when determining whether to approve the 2025/26 budget. It should be noted that the analysis in these EIAs will be refreshed and updated as new evidence becomes available from consultation and engagement activity and other data sources where appropriate.

12. 'Due regard' also means that consideration given to equality matters should be appropriate in the context of the decision being taken. Members should weigh up equality implications against any other relevant factors in the decision-making process. In this case the most significant other matters are:

    a. the statutory requirement to set a balanced budget.
    b. the ambitions the council has for Surrey, which are set out in the Community Vision for Surrey in 2030, The Surrey Way and the Organisation Strategy 2023-2028
    c. the demographic pressures facing the council's services including a rising population with projected increases in the number of older residents and children and young people, and subsequent impacts on demand for council services.

Surrey County Council Efficiency Proposals 2025/26 – Scope of this report

13. All 2025/26 budget efficiencies have been reviewed to determine which proposals require EIAs and which do not. Where delivery plans for efficiencies are more developed, equality

---

[1] Information on the Armed Forces Act/ Covenant Statutory Guidance:
Armed_Forces_Covenant_Duty_Statutory_Guidance.pdf (publishing.service.gov.uk)

analysis has been analysed for this report and summarised here. Full details for each efficiency can be reviewed on the council's website.

14. For efficiency proposals at earlier stages of development, EIAs will be produced for the relevant Cabinet Member and Executive Director, or the whole Cabinet, as required, to consider before making a final decision.

15. Efficiencies that will not directly affect residents or service delivery are not considered in this report. Where efficiencies are linked to staff restructures these may not be published due to the risk of disclosing personally identifiable data used in EIAs. Impacts for these efficiencies are presented at a high level.

16. Some efficiencies are in a formative stage of development, so equality implications at this stage are less clear. As delivery plans for these efficiencies become available, equality implications will be considered and full EIAs completed for decision-makers to consider ahead of implementation.

17. Efficiencies at a more formative stage include:

- Place:
    - Redesign efficiency
- Children, Families and Lifelong Learning (CFLL):
    - Fostering review
    - Review of admin/ staffing costs and business support functions
    - Short breaks efficiency
- Resources:
    - Surrey Arts
    - Reduced trade union posts
    - Staffing reductions
    - IT&D licence reductions

Surrey County Council Efficiency Proposals 2025/26 – Cumulative Impact

18. To determine which protected characteristics are most likely to be impacted by the council's budget, the frequencies with which these characteristics appear in EIAs, as well as the nature of those impacts, have been analysed.

19. The table below summarises the **positive impacts** of these budget efficiencies for both residents and staff by protected characteristics:

2025/26 budget efficiencies – positive equality impacts – protected characteristics										
Efficiency	Age	Disability	Race	Sex	Sexual orientation	Gender reassignment	Religion and belief	Pregnancy and maternity	Marriage and civil partnership	Carers [2]
Key: + = potential positive impact, blanks = no impact, tbc = more evidence being collected										
Adults, Wellbeing and Health Partnerships										
Strengths-based practice and demand management	+	+	+							+

[2] Protected by association with others who possess protected characteristics.

2025/26 budget efficiencies – positive equality impacts – protected characteristics										
Efficiency	Age	Disability	Race	Sex	Sexual orientation	Gender reassignment	Religion and belief	Pregnancy and maternity	Marriage and civil partnership	Carers [2]
Key: + = potential positive impact, blanks = no impact, tbc = more evidence being collected										
Changing care models	+	+								
Purchasing of care packages	+	+	+				+			+
Assessed charging policies	+	+								
Communities function reconfiguration	tbc	tbc	tbc	tbc	tbc	tbc	Tbc	tbc	tbc	tbc
Children, Families and Lifelong Learning										
Reunification Support Service for Looked After Children	+	+	+	+		+	+	+	+	+
Residential Children's Homes Development in Surrey	+	+	+	+		+	+	+	+	
Houses of Multiple Occupation	+	+	+	+			+			
Home to School Travel Assistance (H2STA) Policy Refresh	+	+								
Adolescence Service	+									
Families First and Intensive Family Support Service		+								
Staff Recruitment, Retention and Culture programme	+	+	+		+		+	+		
Surrey Adult Learning Review	+	+	+	+	+	+	+	+	+	+
Place										
Closure of Bagshot (Swift Lane) Community	No positive impacts identified.									

2025/26 budget efficiencies – positive equality impacts – protected characteristics										
Efficiency	Age	Disability	Race	Sex	Sexual orientation	Gender reassignment	Religion and belief	Pregnancy and maternity	Marriage and civil partnership	Carers [2]
Key: + = potential positive impact, blanks = no impact, tbc = more evidence being collected										
Recycling Centre										
Resources										
Customer Transformation		+		+	tbc				tbc	
Review of Data Strategy and Insights Team	tbc	tbc	tbc	tbc	tbc	tbc	Tbc	tbc	tbc	tbc
Twelve15 efficiencies	+	+	+	+	tbc		Tbc			
Organisation Redesign programme	tbc	tbc	tbc	tbc	tbc	tbc	Tbc	tbc	tbc	tbc
Council-wide mobile phone efficiencies	No positive impacts identified.									

20. It is anticipated there may be **negative impacts** on residents and staff with the following protected characteristics:

2025/26 budget efficiencies – negative equality impacts – protected characteristics										
Efficiency	Age	Disability	Race	Sex	Sexual orientation	Gender reassignment	Religion and belief	Pregnancy and maternity	Marriage and civil partnership	Carers
Key: - = potential negative impact, blanks = no impact, tbc = more evidence being collected										
Adults, Wellbeing and Health Partnerships										
Strengths-based practice and demand management	-	-	-	-			-			-
Changing care models		-								-
Purchasing of care packages	-	-								-
Assessed charging policies	-	-								tbc
Communities function reconfiguration	tbc	-	-	tbc	tbc	tbc	tbc	tbc	tbc	tbc
Children, Families and Lifelong Learning										
Reunification Support	No negative impacts identified.									

8

2025/26 budget efficiencies – negative equality impacts – protected characteristics										
Efficiency	Age	Disability	Race	Sex	Sexual orientation	Gender reassignment	Religion and belief	Pregnancy and maternity	Marriage and civil partnership	Carers
Key: - = potential negative impact, blanks = no impact, tbc = more evidence being collected										
Service for Looked After Children										
Residential Children's Homes Development in Surrey		-						-		
Houses of Multiple Occupation	-	-	-	-			-			
Home to School Travel Assistance (H2STA) Policy Refresh	-	-								
Adolescence Service		-								
Families First and Intensive Family Support Service	No negative impacts identified									
Staff Recruitment, Retention and Culture programme	-	-	-	-						
Surrey Adult Learning Review	-	-	-	-				-		
Place										
Closure of Bagshot (Swift Lane) Community Recycling Centre	-	-								
Resources										
Customer Transformation		-	-	-	tbc		-	-	tbc	-
Review of Data Strategy and Insights Team	-	-						-		
Twelve15 efficiencies	-	-	-	-	tbc		tbc			
Organisation Redesign programme	tbc	tbc	tbc	tbc	tbc	tbc	tbc	tbc	tbc	tbc

2025/26 budget efficiencies – negative equality impacts – protected characteristics										
Efficiency	**Age**	**Disability**	**Race**	**Sex**	**Sexual orientation**	**Gender reassignment**	**Religion and belief**	**Pregnancy and maternity**	**Marriage and civil partnership**	**Carers**
Key: - = potential negative impact, blanks = no impact, tbc = more evidence being collected										
Council-wide mobile phone efficiencies	-	-		-						-

21. Other potential positive and negative equality impacts on **other areas of inequality** are identified below:

2025/26 budget efficiencies – impacts on other characteristics	
Efficiency	**Other characteristics**
Adults, Wellbeing and Health Partnerships	
Communities function reconfiguration	• Residents facing economic hardship may be more impacted by the reconfiguration. • There may be disproportionate impacts on key neighbourhoods as defined in the Health and Wellbeing Strategy. These include Hooley, Merstham and Netherne (Reigate and Banstead), Canalside (Woking), Westborough (Guildford) and Bellfields and Slyfield (Guildford).
Children, Families and Lifelong Learning	
Reunification Support Service for Looked After Children	• More Looked After Children will benefit from returning to their parents where circumstances are suitable and depending on readiness of parents to care for the children. Any additional needs for LACs will be considered during the planning process.
Short Breaks	• Some Looked After Children with disabilities may have less access to the service from recommissioning the offer.
Adolescence Service	• Some staff posts could be regraded, leading to potential loss of earnings, impacting those on lower incomes. • Some staff may also not want or have the flexibility to move to the new service due to increased costs from changing office location.
Surrey Adult Learning Review	• Deleting posts and changes to contractual hours could impact staff on already low salaries. Loss of individual working arrangements could impact individuals' ability to remain in work. • Employees with long-term health conditions or on long-term absence may feel isolated or uninformed about the process, or may find securing other employment challenging due to their long-term condition.
Resources	
Customer Transformation	• Other characteristics that may be impacted by this programme include people experiencing socio-economic disadvantage, education and training (literacy) needs, digital exclusion, Gypsy, Roma and Traveller communities, people experiencing homelessness, people with drug or alcohol use issues, people on probation, migrants, refugees and asylum seekers and people who live in more rural communities.
Review of Data Strategy and Insights Team	• Staff with low numeracy skills may have increased anxiety around expectations on data literacy and be cautious about accessing training opportunities.
Twelve15 efficiencies	• Other characteristics that may be impacted by these efficiencies include those with education (literacy) needs, Looked After Children, young carers, those experiencing socio-economic disadvantage and Gypsy, Roma and Traveller communities.

	• Further data on these characteristics are required to establish full extent of impacts.
Council-wide mobile phone efficiencies	• Greater impacts on staff in lower paid roles and experiencing socio-economic disadvantage, including being required to provide their own personal phones and/or fund work calls if using personal devices. • Staff in lower paid roles also disproportionately female.

22. This analysis concludes that the protected characteristics most likely to be both positively and negatively impacted by the budget are:

- **Older adults and their carers, adults of all ages with physical, mental and learning disabilities and their carers.**

  Many efficiencies, particularly in the Adults, Wellbeing and Health Partnerships Directorate, focus on strengths-based practice, supported accommodation solutions and respite for carers to build independence and resilience.

  However, it is acknowledged that some of these changes could lead to anxieties on what they mean for individuals and their carers, meaning close engagement in any solutions will be crucial.

  Older and disabled residents are also more likely to be digitally excluded compared to the wider population, and may need more support as more services are delivered digitally.

- **Children and young people, including those with special educational needs and disabilities (SEND), and their families.**

  The council is investing in key programmes, such as Families First and the Reunification projects, to make sure those children and young people most in need are supported to get the best start in life and good health and wellbeing.

  The capital programme also seeks to develop more bespoke accommodation solutions in the county, meaning more children and young people are supported closer to their families and communities, while their needs and progress towards independence are supported.

  Some changes may have adverse impacts on children and families, such as those who are no longer eligible for transport under the refreshed Home to School Travel Assistance Policy. While they will be supported with other travel assistance options beyond provision of transport, some families may experience inconvenience, such as increased travel costs.

- **Surrey County Council officers, particularly women, working in support services and those from lower-income or socio-economically disadvantaged households.**

  Changes to ways of working in some services could lead to greater opportunities for some staff with protected characteristics. For example, more permanent roles for staff in Children's Social Care (CSC) will offer greater security for people from lower-income households and women, who make up 85% of the CSC workforce. There may also be reduced workplace stress for some staff with protected characteristics, such as neurodivergent staff or those with caring responsibilities, through introducing more efficient systems and tailored working approaches.

  However, where staff restructures are needed, over-representation of women in the council's workforce means there is a greater chance they will be impacted. Staff with lower incomes in those teams will also be more greatly personally impacted by these changes.

Changes to working practices and increased use of digital technology means some staff will require more support to adapt than others. This includes people who are more likely to be digitally excluded such as older and disabled staff and people on lower incomes.

23. Further detail on equality impacts for each efficiency can be found on the council's website.

Mitigations

24. In general terms, the council's approach to mitigating impacts has been to adopt one or more of the following:

    a. Putting service users and staff at the heart of service re-design, using co-design, consultation and engagement methods to produce services that are responsive and focus on supporting people that need them most.

    b. Investing in preventative activity and early-intervention measures to help enable better outcomes earlier and avoiding having to resource high-cost intensive activity that leads to greater pressures on our budget.

    c. Undertaking ongoing evaluation of the impacts of changes to services so we can build further evidence, and update our EIAs, on who is affected by them.

    d. Providing tailored information to service users that are impacted negatively by efficiency proposals so they can draw on their own resources or seek further support either from the council or partner organisations.

    e. Increasing opportunities for residents to access council services in new and easier formats, such as by using digital technologies, while ensuring additional support is provided for residents who may need help to adapt to the new formats, such as some older or disabled people.

    f. Ensuring changes to staffing levels or structures are completed in accordance with the council's human resources policies and procedures and take account of the impact these changes have on the workforce profile.

    g. Ensuring staff with protected characteristics are fully supported with training and adjustments so they can access new ways of working as part of the council's transformation and for all staff to be equipped to support residents to do the same.

    h. Where changes are made to digital, infrastructure, provision is made available to ensure staff are properly trained and that adequate support, advice and guidance is available for both staff and service users. This includes support provided by the workplace adjustments service.

    i. Engaging with partner organisations, including the Voluntary, Community and Faith Sector (VCFS), to support potential gaps in services that might be created due to efficiencies.

    j. Working with District and Borough Councils to ensure their Council Tax Support Schemes can assist economically vulnerable households to offset any significant financial difficulties that might arise because of Council Tax increases.

    k. Where physical changes are being made to Surrey County Council premises, or where new sites are acquired, these will be assessed for any accessibility issues, staff and/or residents will be consulted and relevant adjustments commissioned.

25. Further detail on specific mitigations for budget efficiencies can be found on the council's website.

This page is intentionally left blank

Annex J - CIPFA Financial Management Code self-assessment

Standard		Statement	Score	Improvement areas
1 The responsibilities of the CFO and leadership team	A	The leadership team is able to demonstrate that the services provided by the authority provide value for money *'Putting in place proper arrangements to secure economy, efficiency and effectiveness from their resources. This includes taking properly informed decisions and managing key operational and financial risks so that they can deliver their objectives and safeguard public money.'*	4	Further embed a clear and consistent understanding of VFM through the Finance Academy and Budget Accountability Statements. Focus on budget accountability and continuous improvement in financial management capabilities. Focus on identifying mitigations to ensure corrective action is taken when overspends are forecast.
	B	The authority complies with the CIPFA Statement on the Role of the Chief Finance Officer in Local Government	5	n/a
2 Governance and financial management style	C	The leadership team demonstrates in its actions and behaviours responsibility for governance and internal control	4	Delivering management actions identified through internal audit reviews. Implement any recommendations from the Audit and Governance Committee effectiveness review.
	D	The authority applies the CIPFA/SOLACE (Society of Local Authority Chief Executives) Delivering Good Governance in Local Government: Framework (2016)	4.5	The Council is undertaking a full self-assessment against the characteristics of a well-functioning authority contained in the final Best Value Standards & Intervention publication. Delivery plans for efficiency proposals have been re-designed and expectations re-iterated to ensure delivery plans are in place for all efficiencies identified in the budget proposals, in advance of the 2025/26 financial year.
	E	The financial management style of the authority supports financial sustainability	4	Focus on continuing to improve financial literacy and embed budget accountability across the organisation. Further strengthening the Business Partnering approach and financial management culture through the Business Partnering project, including specific comms and engagement and linking with

8

Annex J header**Annex J - CIPFA Financial Management Code self-assessment**

dateJanuary 2025

Page 184

					induction processes and the performance conversation framework.
3 Long to medium term financial management	F	The authority has carried out a credible and transparent financial resilience assessment	5	n/a	
	G	The authority understands its prospects for financial sustainability in the longer term and has reported this clearly to members	4.5	Further develop a robust approach to financial scenario planning, including modelling of the impact of the Fair Funding Review and other Government Policy Changes.	
	H	The authority complies with the CIPFA Prudential Code for Capital Finance in Local Authorities	5	n/a	
	I	The authority has a rolling multi-year medium-term financial plan consistent with sustainable service plans	4	Develop process to undertake more sensitivity analysis around key cost drivers as part of the budget planning process. Develop demand trajectory modelling through the Analytics and Insights project.	
4 The annual budget	J	The authority complies with its statutory obligations in respect of the budget setting process	5	n/a	
	K	The budget report includes a statement by the chief finance officer on the robustness of the estimates and a statement of the adequacy of the proposed financial reserves	5	n/a	
5 Stakeholder engagement and business plans	L	The authority has engaged where appropriate with key stakeholders in developing its long-term financial strategy, medium-term financial plan and annual budget	5	n/a	
	M	The authority uses an appropriate documented option appraisal methodology to demonstrate the value for money of its decisions	4	Develop and enhance current capital guidance, learning and development offer as part of the Finance Academy, to include full options appraisal, business cases, revenue implications, capital profiling, projections and capital funding.	
6 Monitoring financial performance	N	The leadership team takes action using reports, enabling it to identify and correct emerging risks to its budget strategy and financial sustainability	4	Enhance approach to performance reporting alongside the existing financial reporting arrangements to Corporate Leadership Team, including insights from similar organisations.	

January 2025

					Continue to embed the performance culture through more open performance conversations and collaboration between departments for overall service improvement.
	O	The leadership team takes action using reports enabling it to identify and correct emerging risks to its budget strategy and financial sustainability	5		n/a
	P	The chief finance officer has personal responsibility for ensuring that the statutory accounts provided to the local authority comply with the Code of Practice on Local Authority Accounting in the United Kingdom	4.5		Lessons learned recommendations to be implemented in respect of the preparation and audit of the 2024/25 Statement of Accounts including relating to the quality of audit working papers and re-design of closing processes in light of transition to MySurrey system.
	Q	The presentation of the final outturn figures and variations from budget allow the leadership team to make strategic financial decisions	5		n/a

Leadership	Accountability	Transparency	Standards	Assurance	Sustainability
A	D	L	H	C	E
B	P	M	J	F	G
O	Q		K	N	I

*The lighter shade indicates full compliance

Key to principles:

Organisational **leadership** - demonstrating a clear strategic direction based on a vision in which financial management is embedded into organisational culture.

Accountability – based on medium-term financial planning that drives the annual budget process supported by effective risk management, quality supporting data and whole life costs.

Financial management is undertaken with **transparency** at its core using consistent, meaningful and understandable data, reported frequently with evidence of periodic officer action and elected member decision making.

Adherence to professional **standards** is promoted by the leadership team and is evidenced.

Sources of **assurance** are recognised as an effective tool mainstreamed into financial management, including political scrutiny and the results of external audit, internal audit and inspection.

The long-term **sustainability** of local services is at the heart of all financial management processes and is evidenced by prudent use of public resources.

This page is intentionally left blank

Item 9

SURREY COUNTY COUNCIL

CABINET

DATE:	**28 JANUARY 2025**
REPORT OF CABINET MEMBER:	**KEVIN DEANUS, CABINET MEMBER FOR FIRE AND RESCUE AND RESILIENCE**
LEAD OFFICER:	**DAN QUIN, EXECUTIVE DIRECTOR COMMUNITY PROTECTION & EMERGENCIES (CHIEF FIRE OFFICER)**
SUBJECT:	**COMMUNITY RISK MANAGEMENT PLAN (CRMP) 2025-2030**
ORGANISATION STRATEGY PRIORITY AREA:	**SURREY FIRE AND RESCUE SERVICE (SFRS)**

Purpose of the Report:

This report is being delivered following extensive and robust staff and public engagement and consultation on the next strategic plan for SFRS as attached in (**annex 1**). This plan, known as the CRMP, will replace the current strategic plan known as the Making Surrey Safer Plan (MSSP) (2020-2024) (**background paper A**). The MSSP expired at the end of 2024, therefore we must have a CRMP agreed and in place for 2025 onwards.

All Fire and Rescue Authorities are required (under the Fire and Rescue National Framework 2018) to produce a CRMP of a minimum three-year duration. This should clearly identify the existing, new and emerging risks as well as outlining how the fire and rescue service will mitigate these risks and respond to fires and other emergencies. It should be produced in consultation with the public, staff, local partners and Trade Union/representative bodies and must reflect current risk information known to the service.

For an understanding of risk, the service uses the Community Risk Profile (CRP) (**annex 2**), which outlines the known and emerging risks for SFRS. SFRS also asked residents and staff in their Community Survey about their perception of local risk and their views of SFRS.

The aim behind the CRMP is to develop a holistic approach to managing risk across Surrey, understanding our communities and being able to influence behaviour to reduce risk through prevention and protection activities, whilst still ensuring the service continues to respond to emergencies.

As stated, this plan was consulted on with both the public and staff from 6 May to 6 September 2024, with a pause in the public consultation for the pre-election period from 27 May to 4 July 2024. The feedback gained during the consultation has shown

that there is a majority positive 'approval rating' for the six proposals requiring an agreement/disagreement level, ranging between 62% to 76%. The analysis report (**annex 3**) was created by Surrey County Council's (SCC) Research Intelligence Unit (RIU) following the consultation period.

Some key themes included:

- Emphasis on data-driven decisions: This is already supported by SFRS's annual review of the risk assessment of Surrey – the Community Risk Profile.
- Suggestions of cost cutting measures: This CRMP is based on risk and not predicated on any cost savings. In the last three financial years, SFRS's budget has increased by £8.7m.
- Focus on Banstead Fire Station and Camberley Fire Station proposals: regardless of any review or changes, SFRS's ten-minute Surrey-wide response target to critical incidents and our fire engine availability target (of 16 fire engines in the night and 20 in the day) remain unchanged.
- Misunderstanding around how SFRS operates: providing a service-wide response - balancing resources across the county to ensure we can attend all emergencies. Moving resources around to meet the risk at any given time. This approach ensures that all emergencies receive an appropriate response to incidents, based on risk, regardless of their location within the county. This is the way the service has operated for many years now and there is no change to that within this plan.

Recommendations:

It is recommended that Cabinet:

1. Approves the CRMP for 2025-2030, ensuring that SFRS can begin implementing the service-wide strategy from April 2025 in a staged approach.

Reason for Recommendations:

- SFRS has consulted both its staff and the public on the seven CRMP proposals, details of which were shared with them via a thorough communications and engagement campaign.
- The plans set out how the service will prevent, protect and respond to emergencies during 2025-2030, aligning resources to the right locations, ensuring vital equipment is appropriate and effective, and supporting the wider health and wellbeing agenda.
- The feedback gained during this consultation has shown that there is a majority positive 'approval rating' for the six proposals requiring an agreement/disagreement level, ranging between 62% to 76%. The analysis report (**annex 3**) was created by Surrey County Council's (SCC) Research Intelligence Unit (RIU) following the consultation period.
- An audit of SFRS's CRP (**annex 2**) has been conducted by Nottingham Trent University (NTU) to ensure accuracy and robustness. NTU are leaders in public research who led on the National Fire Chiefs Council's (NFCC) National Risk Methodologies, reviewed the data and evidence used to

develop the CRMP's strategic aims and proposals. They confirmed that "…Surrey FRS has undertaken a robust process to develop the CRMP for Surrey".

Executive Summary:

CRMP 2025-2030 proposals:

1. The proposals address the findings in the CRP 2024 (**annex 2**) as well as the response from communities, stakeholders and staff following the Community Survey and a series of engagement and focus groups completed as part of the CRMP planning process. The CRMP will focus on three pillars of activity from which there will be seven overall proposals for change along with a series of commitments across all of the main areas of the service.
2. The three overarching pillars and subsequent proposals are:

<u>Balance our prevention, protection, and response resources to ensure that Surrey is a safe place to live, work and do business.</u>

Proposal 1.1: Relocate the current Banstead fire engine and crew to Godstone Fire Station in 2026, following an updated and extensive review of any options within the Whyteleafe area.

3. Relocating Banstead Fire Station is required due to the lease on the site ending in 2026 (during the consultation it was confirmed by Surrey Police that the lease duration could be extended by a further year, from 2025), and no appropriate alternative location had been found by SCC's Land and Property Team. The current Banstead site is also not fit for purpose, in that crews cannot train there, which results in them needing to visit other fire stations regularly to do so. There are also issues surrounding contaminants management and ensuring that the building has facilities of a modern workplace.

4. Whilst reviewing options for this change, it was noted that the most appropriate location for Banstead Fire Station would be the Whyteleafe area to manage risk. However, as previously mentioned, a review of options in this area found that no appropriate location is available. Therefore, the most appropriate deliverable option is to relocate the crew and fire engine to Godstone Fire Station, which gives a good balance of cover across Surrey.
5. This will see an overall reduction in the number of fire stations in Surrey (from 25 to 24). However, this will not see a decrease in fire engines, as the crew and fire engine will be relocated to Godstone Fire Station.

6. As a result of the consultation and a desire to ensure all potential sites could be considered, a one-year extension to the Banstead Fire Station lease, to 2026, has been agreed with the owners of the site to allow for an updated and extensive review of any options within the Whyteleafe area to be undertaken again by SCC's Land and Property team (in collaboration with SFRS). After this time the site will be sold by the owners and if no appropriate and affordable site has been found, the relocation to Godstone Fire Station will

continue towards the end of 2026. Works to upgrade the facilities at Godstone Fire Station will continue during this time, should an appropriate and affordable site in Whyteleafe not be found.

7. If a potential site is found in the Whyteleafe area this will initiate a process to explore the planning requirements and seek capital funding approval.

8. Key themes from the consultation include: querying the response time accuracy, requests to check alternative solutions in Banstead as well as other local fire stations, community and social impact of removal of a fire station, transparency of the consultation/funding and requests to renew the lease. None of which pose appropriate solutions or options for SFRS to take forward. Questions relating to the proposals will be answered in a separate Frequently Asked Questions (FAQ's) document to be released to the public prior to Cabinet (EG: requests to check alternative solutions in Banstead).

Proposal 1.2: Review the capability and locations of specialist vehicles and equipment to ensure they match the current and potential risks effectively.

9. Reviewing specialist vehicles and equipment will enable us to analyse where resources are located and how they are crewed, ensuring it's in the right place at the right time.
10. The service can therefore then identify whether investment into new technology and innovations is needed.

11. As a result of the consultation, the proposal gained a 76% approval score.

12. Key qualitative feedback included: emphasis on equipment modernisation, response, accessibility and traffic, specialist equipment placement/locations, Learning and Development of specials, evidence-based decision making. All of these points will be taken through to support the project and development of this review, should this plan be approved, none of the key feedback impacted the proposal being seen through as it is.

Proposal 1.3: Review current resources at Camberley Fire Station and consider relocation options within the boroughs of Spelthorne, Elmbridge and Runnymede.

13. Camberley Fire Station, which currently has a 24/7 fire engine and a day-time fire engine (7am-7pm) will change to a single 24/7 fire engine only. The staff that make up the current day-time fire engine will be relocated to a fire station in either Spelthorne, Elmbridge or Runnymede (Fordbridge, Painshill, Walton or Egham) to support additional night-time availability at that location.

14. This is in line with risk and demand throughout the county and balances cover.

15. The CRP 2024 (**annex 2**) identified 'high risk' property clusters in Spelthorne, Elmbridge, and two areas within Runnymede (around Egham and Englefield Green). To address this heightened risk in the north of the county, as well as fire stations in Spelthorne and Elmbridge, we propose including Runnymede

as an option for additional night-time fire and rescue cover. Feedback from the CRMP consultation also supported Runnymede as a suitable option.

16. To ensure our resources align with risk, we will continue to review the CRP (**annex 2**) annually to guide our approach to community safety and the allocation of resources.

17. As a result of the consultation, the proposal gained a 62% approval score.

18. Key qualitative feedback included: concerns about response times (particularly during wildfire season), impact on community safety, perception of cost-cutting, support for data-driven decisions and suggestions for alternative locations (inc. Runnymede/Egham) as well as 'bids' for some of the stations already listed. As per paragraph 20, the key feedback to be included in the proposal was in relation to adding Runnymede into the list of stations. The other questions are to be picked up in the previously mentioned FAQ's document.

Ensure we have the right resources in the right place and at the right time by better understanding risks that face our communities.

Proposal 2.1: Develop a response model which responds to changing risk and seasonal demand.

19. Developing a 'seasonal response model' in addition to our current response requirements means that the service would look at where risk and demand data shows we need more support during heightened periods, such as the summer wildfire period and winter flooding.

20. This will potentially also enable the service to deliver additional resources aligned to the review of specialist vehicles.

21. As a result of the consultation, the proposal gained a 76% approval score.

22. Key qualitative feedback included: concerns about resource for this, perception of cost-cutting measures, climate change and lack of understanding around how this might work. None of which impact the proposal as it is, however will be picked up within the FAQ's document previously mentioned.

Proposal 2.2: Adapt our On-Call weekend plan to better respond to risk.

23. Data shows that risk and demand doesn't change per day of the week, yet the current plan (the MSSP background paper A) allows five On-Call fire engines (Chobham, Dunsfold, Gomshall, Guildford and Lingfield) to be made available at weekend days, when they are not needed to support fire engine availability.

24. The on-call weekend proposal is that these fire engines can be 'switched off' during the daytime weekend hours. Data shows that in the period 2022-23, on average these fire engines were only made available 12% of weekend days. Due to the technology which allows the service to dynamically crew the county, the service utilises assets from across Surrey to maintain cover. Therefore, the service's view is that this will better align to the county risk

whilst ensuring a balance of resources. This change will therefore focus the contractual hours of those On-Call firefighters into the evening time when they are most needed.

25. As a result of the consultation, the proposal gained a 64% approval score.

26. Key qualitative feedback included: impact on on-call firefighters at these stations, cost for on-call firefighters being low and data/evidence-based decision making. None of which impact the proposal to be seen through as is, however will be picked up within the FAQ's document previously mentioned.

Proposal 2.3: Adapt existing prevention, protection and response arrangements in Haslemere to ensure the most appropriate allocation of resources.

27. Haslemere Fire Station is historically low risk which is matched by lower incident demand when compared to similarly crewed fire stations. Therefore, the proposal is to review how to efficiently and effectively crew Haslemere, whilst maintaining a 24/7 fire and rescue resource. This could include an increase in On-Call staff, the development of part time contract options, and utilising existing daytime operational staff from other areas of the service who can undertake prevention and protection activities whilst supporting fire engine availability.

28. As a result of the consultation, the proposal gained a 66% approval score.

29. Key qualitative feedback included: concerns about response times, support for maintaining 24/7 cover, scepticism around on-call staffing, impact on community safety activities, need for local knowledge and suggestions to close cluster of stations and build one in the middle. None of which impacted the proposal being seen through as it is, however all points will be included in the project (should this plan be approved) and questions answered in the FAQ's document.

Identify and develop more opportunities to keep our communities safe through prevention, protection and partnership activities.

Proposal 3.1: Working with our health partners to respond to those who are most vulnerable in Surrey.

30. We want to expand the number of programmes that we work on with health partners. These include keeping people safer in their homes, working with care partners in the community and supporting with homelessness and other vulnerable groups.

31. As part of our continued partnership approach the options developed will support our partners and will not impact our ability to respond to fire and rescue emergencies. The intention is to review how we work with partners to maximise prevention and protection benefits.

32. This could see SFRS supporting health partners with the discharging of vulnerable patients from hospital to ensure their homes are safe for their return, and options to offer greater support to our partners in South East

Coast Ambulance Service in responding to medical emergencies and/or non-emergencies.

33. As a result of our consultation, the proposal gained a 74% approval score.

34. Key qualitative feedback included: Recruitment and retention challenges with these new elements, impact on morale, need for a comprehensive review, operational effectiveness and overall support. None of which impact the proposal being seen through, however will be included in the project if approved.

Consultation:

35. The service undertook a three-month statutory consultation (with a brief pause due to the General Election). This included a wide range of communications and engagement tactics both via traditional and modern media.

36. 511 responses were gained via consultation (69.1% were not staff members, 28% were SFRS staff members and 2.9% were family members of staff). A full breakdown of demographic breakdown and responses can be found in **annex 3**). Through social media adverts, 67.6k people were reached which resulted in 2.3k link clicks to the consultation hub. SFRS's Chief Fire Officers press article gained 852 views.

37. Trade Union engagement throughout this CRMP has been vital. We have worked closely with all Trade Unions (the Fire Brigades Union, Unison and the Fire Officers Association) as part of regular meetings and information sharing. This was to ensure that they all had the opportunity to comment on our proposals. As part of this process the Fire Brigades Union has written to SFRS and elected members stating their position.

38. To ensure accuracy and robustness, NTU, leaders in public research who also led on the NFCC National Risk Methodologies, reviewed the data and evidence used to develop the CRMP's strategic aims and proposals. They then developed a report outlining key findings (**annex 4**), which was accessible and focussed the review of their processes ahead of the public consultation for the CRMP which started in May 2024. The NTU confirmed that *"…Surrey FRS has undertaken a robust process to develop the CRMP for Surrey"*.

39. The Consultation Institute (tCI) were contracted to ensure a transparent and open process for communication, consultation and engagement. SFRS achieved a Certificate of Consultation Readiness, which was a thorough review of all of the pre-consultation activities and processes allowing SFRS to demonstrate they have met tCI's standards to proceed to consultation. This was a result of their specialist knowledge within the industry at the time.

40. Two Members Development Sessions and one Member Drop-In session were held during, before and after the consultation. Some members also took the opportunity to attend one of the 38 roadshow events held in all 11 district and

boroughs as part of the wider communications and engagement campaign. 20 member questions were answered throughout this period.

41. SFRS joined the Communities, Environment and Highways Select Committee Meeting on Thursday 5 December. Recommendations were that the Communities, Environment and Highways Select Committee:

I. Welcomes the use of technology to ensure a dynamic and agile fire service across the county.
II. Welcomes the robust process undertaken to develop the Community Risk Management Plan including external validation by the NTU.
III. Recommends that the Fire Service continues to explore closer working relationships with Health partners and promotes a preventative model to risk where possible.

Risk Management and Implications:

42. The CRMP provides mitigations against the risks identified in our CRP (**annex 2**) which is updated and published annually. The CRP (**annex 2**) provides an up-to-date picture, across the county, of the changing risk landscape. It uses new methodologies to understand and highlight areas of concern, thereby enabling SFRS to identify the best options for risk mitigation across Surrey as a whole, looking at the impact of geography, demographics, lifestyle and emerging risks to the community. In assessing these risks, we consider various factors. The CRP (**annex 2**) incorporates data on the population of Surrey, past incidents, the natural environment, and buildings.

43. We identify the trends and take account emerging challenges including the increasing population within Surrey and the development on new technology such as electric vehicles. The CRP (**annex 2**) identifies not only the risks but also the impact which may affect Surrey residents, those who work in Surrey as well as those who pass through or visit as well as the potential impacts to our SFRS staff.

44. In addition, a People Impact Assessment (PIA) has been created (**annex 5**) and updated following consultation to identify the impact of SFRS's proposed changes on our staff and communities and details any required mitigations. This will support the delivery of the CRMP during 2025-2030 and further PIAs may be developed.

45. The delivery of this CRMP will take place in a staged approach to ensure that any lessons learnt can be seen and taken on board, allowing thorough evaluation of our implemented changes. This will be overseen by members of SFRS's Service Leadership Team.

Financial and Value for Money Implications:

46. This CRMP has not been developed to meet any cost efficiencies. Any additional costs required to implement the plan will be considered as part of future decisions, through normal governance processes.

47. The CRMP focuses on providing an efficient and effective service across Surrey taking into account risks and the expected demand, especially with regards to our seasonal variations regarding wildfire and flooding.

48. This CRMP has a focus on making better use of our existing resources and locations allowing us to continue collaborating with other emergency service partners and relevant agencies, without having to reduce frontline service delivery and supporting our partners in health.

Section 151 Officer Commentary:

49. 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.

50. 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.

51. The CRMP will improve efficiency, aligning resources with need. Its approval will not in itself result in additional costs, instead any future decisions arising from the CRMP will be considered in the normal way including any financial implications arising.

Legal Implications – Monitoring Officer:

52. The Fire and Rescue Service National Framework is the means by which the Government sets out its priorities and objectives for Fire and Rescue Authorities in England. Pursuant to the Framework all Fire and Rescue Authorities must produce a publicly available Community Risk Management Plan covering at least a three-year time span which reflects up to date risk information and how services can be best used to mitigate that risk. Cabinet is being asked to approve a new plan for SFRS known as the Community Risk Management Plan "CRMP" which is intended to replace the previous plan known as "Making Surrey Safer."

53. Cabinet will note that the CRMP contains a number of proposed changes to service provision which could be perceived by some residents as being a significant variation to the way in which services are provided. This report sets out details of the consultation that has taken place around those changes together with a summary of the consultation feedback and SFRS response. In considering whether to approve the CRMP, the Cabinet must take account of the outcome of the consultation.

54. The council is required to consider the impact of its decisions on those residents with protected characteristics. An assessment has been carried out and the outcome is set out in the paragraphs below. Potential negative impacts have been identified, and the mitigations have been set out for Cabinet to consider.

55. Equalities and Diversity:

56. Most proposals present a neutral impact on protected characteristics. The most significant proposal from an equalities and diversity perspective, involves relocating the fire engine from Banstead Fire Station to Godstone Fire Station, outlined below:

Disability (Mental, Physical, and Carers of Disabled People)

57. The relocation of Banstead's fire engine to Godstone will increase average critical response times in Reigate and Banstead by 40 seconds, though still within the 10-minute target. This may impact residents with disabilities.

58. Reigate and Banstead: 6.2% of residents aged 65+ have dementia.

59. Tandridge: 28% of households have someone with a disability; 7.9% of residents aged 65+ have dementia. Response times will decrease by 10 seconds.

60. A People Impact Assessment (PIA) has been created considering all proposals for change. However, SFRS will develop dedicated PIA's for specific areas of change before implementation. These will assess community impacts and consultation feedback. A mitigation for this specific impact is to ensure a full and thorough programme of prevention and protection activity continues to be delivered to the communities of Banstead, aiming to stop incidents from happening in the first place.

61. Another notable item within the overarching PIA is changes to staff ways of working. This may have potential impacts due to family commitments and caring responsibilities. Therefore a specific PIA for projects where this is noted will focus on consultation feedback to identify impacts based on personal circumstances. EG: fair transfer process, engagement to focus on the optimum shift patterns.

Age (People of all ages)

62. The relocation of Banstead fire engine to Godstone will increase average critical response times in Reigate and Banstead by 40 seconds, though still within the 10-minute target. This may impact age as a protected characteristic.

63. Reigate and Banstead: 18% of the population is aged 65 and over.

64. Tandridge: 21% of the population is aged 65 and over; response times will decrease by 10 seconds.

65. As mentioned in paragraph 62, dedicated PIA's will be created for projects whereby people of all ages may be impacted by the proposals for change. A mitigation to be included for this specific project/proposal is to ensure a full and thorough programme of prevention and protection activity continues to be delivered to the communities of Banstead, aiming to stop incidents from happening in the first place.

9

Other Implications:

66. 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	Surrey continues to experience relatively low numbers of fatalities and injuries from fires. Our aim is to continue to reduce these small numbers through the accurate identification and working with those most vulnerable in our communities. We will also continue to work with partners to reduce the Killed or Seriously Injured (KSI) on the roads of Surrey with a focus on young drivers.
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	Our plan aligns to an increased integration and collaboration with health partners and other emergency services to assist them with the ongoing increase in demand for health care provision. This will be most noticeable where we can assist with ensuring people can return to their homes following a hospital stay through coordinated Safe and Well Visit (SAWV). Also looking at how we can contribute to falls assist calls and possible co-responding (national conversations are ongoing). We will continue to educate the public through community safety campaigns, Domestic SAWVs and Business SAWVs.

What Happens Next:

    a. Once approved, the report will be published on SCC's website and promoted to all residents.

    b. Implementation will begin as of April 2025 in a staged approach across the five years.

Report Author: Dan Quin, Executive Director Community Protection & Emergencies (Chief Fire Officer), dan.quin@surreycc.gov.uk, 07989 160 117.

Consulted:

Communities (12-week consultation and promotional campaign).

SFRS staff (18-week consultation and promotional campaign).

SCC staff

Trade Unions

Members

9

Annexes:

1 - Surrey Fire and Rescue Service's Community Risk Management Plan 2025-30.

2 - SFRS Community Risk Profile 2024. Please follow the link, printed copy available on request.

3 – SFRS/SCC Analysis Report of the CRMP consultation.

4 – NTU report of SFRS's CRP.

5 – People Impact Assessment for SFRS's CRMP.

Sources/background papers:

A - Making Surrey Safer Plan 2020-2024

B - SFRS Community Risk Profile 2023

9

This page is intentionally left blank

Surrey Fire and Rescue Service Community Risk Management Plan 2025-2030

No One Left Behind

6

Contents

Foreword: Our plan to ensure no one is left behind.

Welcome to our Community Risk Management Plan (CRMP) 2025-2030.
This plan sets out who we are as a service, how we work, the risks facing our communities and what we're going to be focusing on throughout the next five years. We are a team of dedicated professionals who are committed to serving our communities, underpinned by teamwork, mutual respect and an inclusive working environment. Our ultimate aims are to prevent emergencies and protect Surrey, whilst ensuring we have the right resources in place to respond to incidents, should we need to.

Dan Quin
Chief Fire Officer
Surrey Fire and
Rescue Service

Surrey Fire and Rescue Service (SFRS) plays a crucial role in protecting people who live, work, travel through, visit and do business in the county. In an ever-changing world of new technology and evolving environmental factors, it is important that we assess and reshape how we deliver our services to suit our communities needs. This allows us to respond appropriately to current and emerging risks in Surrey.

Our CRMP will continue to build upon the work that has been carried out throughout the last few years. Since 2020, we've worked together to drive efficiency and productivity of our teams, strengthened our plan to address high-risk areas, and worked with East and West Sussex Fire and Rescue Services in our control room.

Additionally, through our prevention activities detailed below, we are supporting Surrey communities to reduce emergencies from happening in the first place, by working with landowners to prevent wildfires and delivering Safe and Well Visits to our most vulnerable communities.

We are committed to aligning to the Fire and Rescue National Framework for England (2018) which sets out the Governments priorities and objectives for Fire and Rescue Authorities and the Government's fire and rescue reform agenda. This includes the inspection regime by His Majesty's Inspectorate of Constabulary and Fire & Rescue Service (HMICFRS) and responding to the outcomes of the White Paper – Reforming our Fire and Rescue

Service. Our goal is to provide an efficient, effective, accountable and transparent service that reflects the diverse needs of the communities we serve but also fosters an inclusive environment where everyone feels valued and respected.

Through data analysis, community and our own staff input, we have identified the key risks we face and what people are most concerned about. This has helped us develop this plan for 2025-2030. The insights provided by Surrey communities and our workforce have been invaluable in shaping the direction of our initiatives. Thank you to everyone who has contributed to the development of our CRMP. Your support has been instrumental in building safer and more resilient communities.

Foreword: Our plan to ensure no one is left behind.

I am honoured to be Cabinet Member for SFRS and I thoroughly support the service in ensuring that it plays a vital role in safeguarding our communities and supporting Surrey County Council's (SCC) vision of *No One Left Behind*.

SCC is an ambitious organisation, always looking to improve. As an integral part of SCC, SFRS is dedicated to ensuring that we keep people safe and to empower residents, visitors and businesses in the county to lead safer, more resilient lives.

Following thorough consultation with our communities, staff, partners and stakeholders, this CRMP outlines our service's path for the next five years.

I would like to take this opportunity to thank everyone who has taken the time to respond to the consultation and taken part in engagement activities – you have all helped to shape our fire and rescue service.

This plan outlines our whole-service approach and commitment to protecting lives, minimising risks and enhancing community resilience through the service's strategic objectives and commitments.

Kevin Deanus
Cabinet Member for Surrey Fire and Rescue
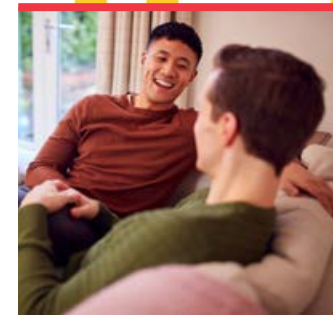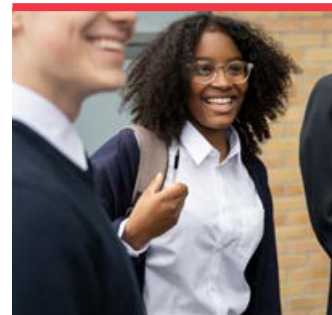
What is a Community Risk Management Plan (CRMP)?

Fire and Rescue National Framework for England

The framework sets out the government's priorities and objectives for fire and rescue authorities. It can be read on the Government's website.

A CRMP should be produced in consultation with the public, staff, local partners and Trade Union/representative bodies. We have involved both the community and staff in the development of our plan through engagement and subsequently formal consultation. In addition, we used the risk information from our Community Risk Profile and various other documents, existing plans, and evidence to shape our CRMP for 2025-2030.

Community Risk Profile (CRP)

We take a data-driven approach in understanding what risks exist and could impact Surrey residents and communities. We collect this information as part of our CRP.

We review our risk and demand data within our CRP every year to make sure it stays up to date. If required we can change or adjust our services accordingly to match the changing risk, this could result in a further review of the CRMP within the 2025-2030 period.

Within the CRP document you will see a detailed breakdown of the four categories of risks (people, places, premises, products) identified in Surrey and the data to support these. The CRP document can be read in full on SCC's website.

The CRP includes data on the types of emergencies we respond to and other factors, including understanding where the most vulnerable people are. The CRP includes a mixture of historical incident data and data about other factors that contribute to risk.

We use this information together with national and local statistics to help us identify risks. These include information from the National Risk Register and the Surrey Local Resilience Forum Community Risk Register.

An overview of our CRP findings can be found later in this document.

Statement of Assurance

We must provide assurance on financial, governance and operational matters and show how they have had due regard to the expectations set out in their community risk management plan and the requirements included in the Fire and Rescue National Framework.

To provide these assurances, we publish an annual statement of assurance. It can be found on SCC's website.

Productivity and Efficiency Plan

Our Productivity and Efficiency Plan provides information on how we manage our budget, look for efficiencies and monitor staff productivity.

It's available on SCC's website.

Surrey Risk Register

The risk register gives information about the hazards that exist in the county and the measures in place to reduce their impact. The full register is available on SCC's website.

National Risk Register

The Government's National Risk Register aims to build an understanding of risks facing the UK.

It can be read on the Government's website.

The county of Surrey

Households: **481,818**

High-rises*: **89**

Non-domestic premises: **65,000**

Grade I listed buildings: **105**

Grade II listed buildings: **352**

Train stations: **84**

Size: **1,660km²**

Most spoken languages after English: **Polish, Romanian, Portuguese**

Ethnicity:
White **76.6%**
White other **8.9%**
Asian **7.7%**
Black **1.7%**
Mixed **3.4%**
Other **1.7%**

People in Surrey over the age of 65: **Around 1 in every 5**

Spelthorne

Runnymede

Surrey Heath

Elmbridge

Epsom & Ewell

Woking

Reigate & Banstead

Guildford

Mole Valley

Tandridge

Waverley

Rivers: **Wey, Mole & Thames**

Population: **1,203,108**

*7 stories or more or 18 metres or more in height.

Data based on Census shown in Surrey-i, SFRS's 2024 CRP, SCC and SFRS data.

About Surrey Fire and Rescue Service

SURREY FIRE AND RESCUE SERVICE

Fire stations:
25*

Staff members:
778

Volunteers:
14

Wholetime operational staff:
444

On-call operational staff:
138

Joint Fire Control staff:
50

Specialist support staff:
146

Vehicles: **206**   Boats: **6**

Frontline fire engines:
30

Other fire engines (used for training, driver training and more):
14

Animal/ heavy rescue vehicles:
4

Environmental protection vehicles:
2

Prime movers:
3

Welfare support vehicles:
2

Control units:
2

Fire investigation vans:
6

Officer response cars:
44

Wildfire vehicles:
20

Water rescue/ flood response vehicles:
8

Boats:
6

Height vehicles (one aerial ladder platform and one turntable ladder):
2

Water carriers:
3

Support vehicles (including fleet maintenance vehicles):
66

*We have 25 fire stations currently, whilst we conduct an extensive review for an alternative site for Banstead.

During 2023/24

10,171 incidents attended. **19%** fires, **38%** non-fire incidents
(this includes road traffic collisions, water rescues and more),

43% false alarms.*

17,253 999 calls answered for SFRS, plus a further **28,698** for West and East Sussex Fire and Rescue Services.

5,727 Safe and Well Visits undertaken.

395 educational visits conducted by the specialist team, teaching about fire and water safety.

462 fire investigations.

1,682 Business Safe and Well Visits undertaken.

1,143 Fire Safety Audits.

1,250 training courses delivered by our in-house Learning and Development team.

7,999 fleet maintenance jobs completed by the Workshop Team and **1,614** hours in callouts for our on-call technicians.

Three new fire engines have been rolled out to stations with a further 13 scheduled to be delivered,
plus a refurbishment of four existing fire engines planned in the next year.

1,448 wildfire personal protective equipment items, issued to firefighters.

Our Fire Investigation team have attended **15** domestic abuse call outs to support the person with advice
and equipment to help keep them safe, like fireproof letter boxes and door jams.

*A new automatic fire alarms policy has been introduced during this timeframe to reduce the number of false alarms attended.

Our Core Code of Ethics

WE PUT OUR COMMUNITIES FIRST

We do this by...

putting the interest of the public and service users first.

We have adopted the National Fire Chief Council's (NFCC) Core Code of Ethics.

These are embedded throughout SFRS. They are absolutely vital to underpinning our culture and outlining the expected behaviours of everyone in our service, these help ensure that communities are supported equally and in the best way.

WE ACT WITH INTEGRITY

We do this by...

being open, honest and consistent in everything we do.

WE ACT WITH DIGNITY AND RESPECT

We do this by...

making decisions objectively based on evidence, without discrimination or bias.

WE ARE LEADERS

We do this by...

being positive role models, always demonstrating flexibility and resilience, we're all accountable for everything we do and challenge behaviour that falls short of the highest standards.

WE ARE AMBASSADORS OF EQUALITY, DIVERSITY AND INCLUSION

We do this by...

continually recognising and promoting the value of EDI both within the FRS and the wider communities in which we serve. We stand against all forms of discrimination, create equal opportunities, promote equality, foster good relations and celebrate differences.

Our Fire and Rescue Authority and Governance

SCC is the Fire and Rescue Authority for SFRS and provides assurance on financial, governance and operational matters and evidence how they have shown due regard to the expectations set out in their CRMP.

In Surrey there are 81 Councillors. The Cabinet is the part of the Council which is responsible for most day-to-day decisions as set out in the Council Constitution. It is made up of a Leader, Deputy Leader and up to nine other elected councillors. A Cabinet lead member oversees a portfolio of services and SFRS's Cabinet Member oversees Fire & Rescue and Resilience. Decisions are undertaken in accordance with the Council Constitution and the procedures followed ensures decisions are open, transparent and accountable to the residents and communities we serve.

The County Council Select Committee provides scrutiny of the services by SFRS in the Communities, Environment and Highways Select Committee. This is chaired by a county councillor and its membership consists of county councillors representing all political parties in Surrey. The Select Committee reviews the priorities, performance and inspection reports that the service provides to HMICFRS.

Additional oversight and assurance is provided by SFRS and SCC's leadership teams on a monthly basis and prior to a decision being taken to cabinet. The decision making process, which can be found on Surrey County Council's website, is detailed in the council's constitution.

SFRS Governance Structure

Full Council
Chair – County Chairman

County Leadership Team
Chair – SCC Chief Executive

Fire and Rescue Authority Cabinet
Chair – SCC Leader

Communities, Environment and Highways Select Committee
Chair – county councillor

SFRS Service Leadership Team, including the Chief Fire Officer
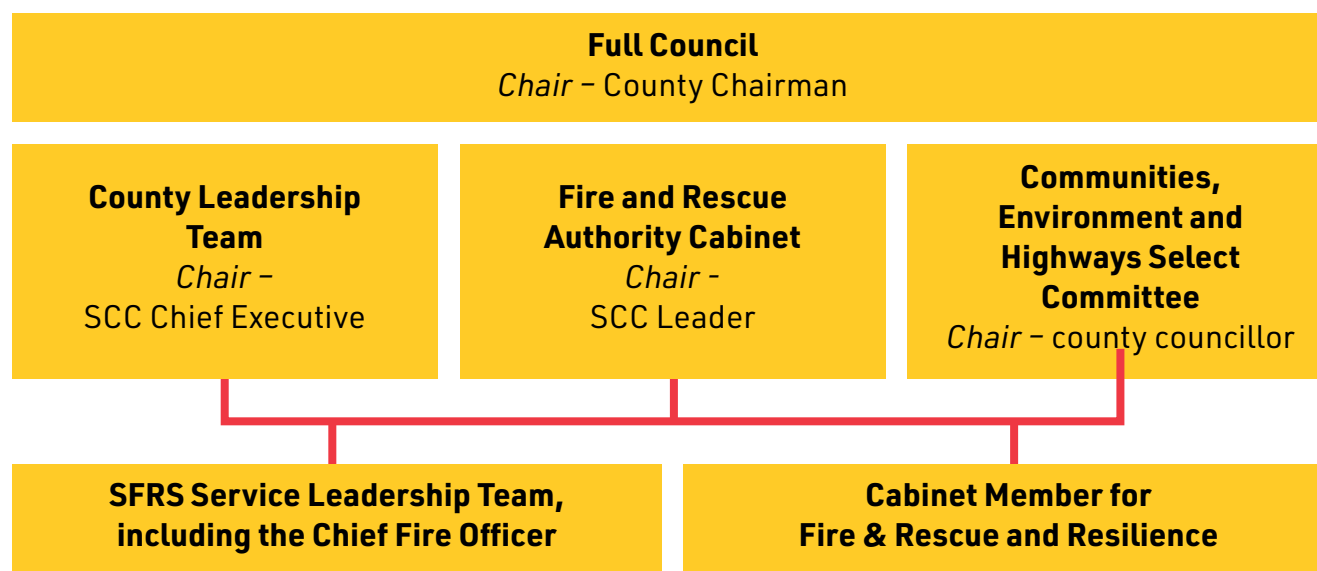
Cabinet Member for Fire & Rescue and Resilience

In our CRMP, we assure and monitor our activities using specific Key Performance Indicators (KPIs) to maintain our high standards of safety and effectiveness. These KPIs, which include response times to emergencies, prevention and community engagement levels, our protection activities, health and safety, wellbeing, organisational culture and our training provision, providing measurable and objective data to evaluate our performance.

Regular monitoring and analysis of these indicators allow us to identify trends, assess the impact of our strategies, and make informed decisions for continuous improvement. By maintaining transparency and accountability through KPIs, and reporting to our Cabinet Member, we can effectively manage risks and enhance the safety and wellbeing of our community.

Page 204
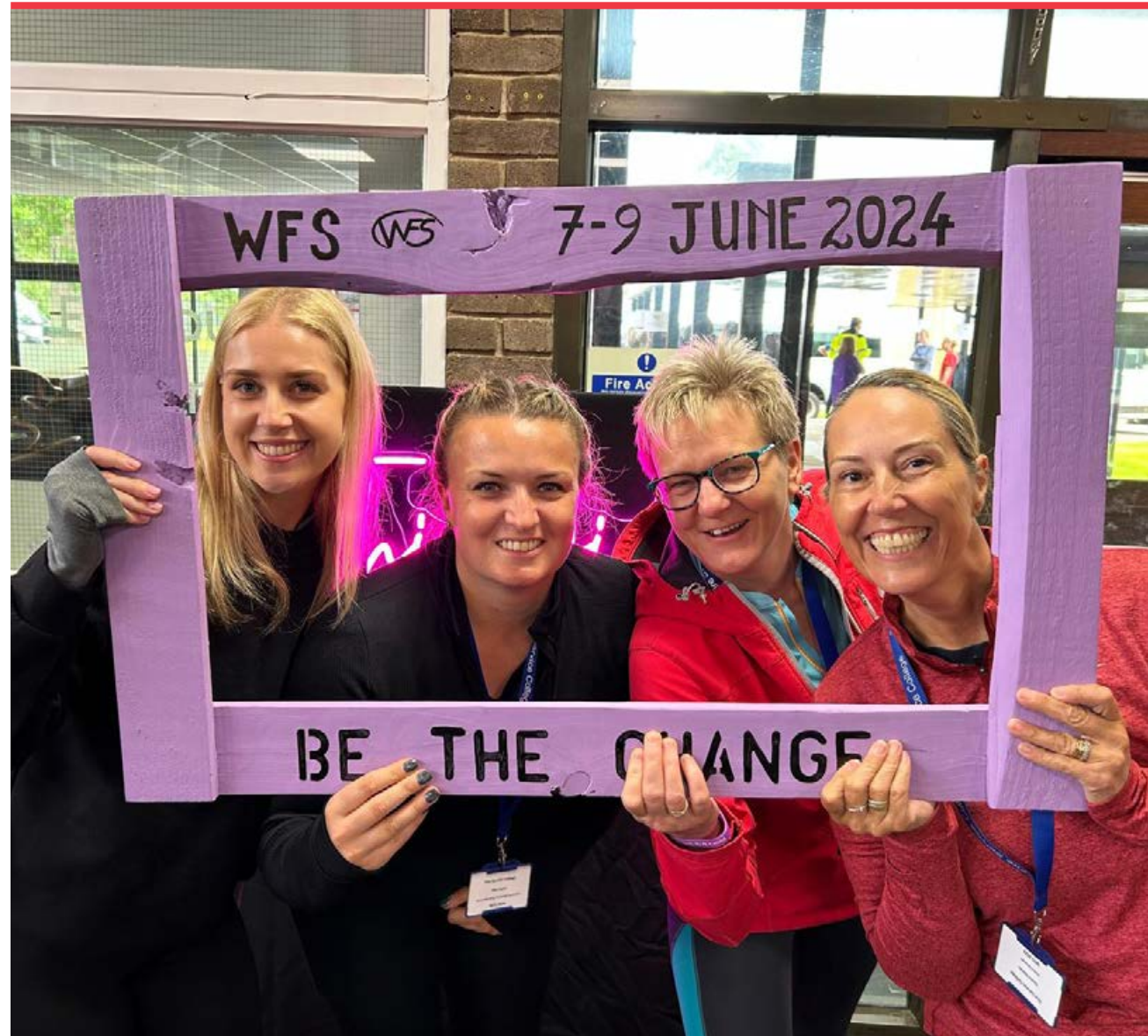
The Surrey Way

The Surrey Way explains the way we do things at SCC. It defines our purpose and our mission to tackle inequality and make sure that no one is left behind.

The three components of The Surrey Way are:

OUR PURPOSE

OUR ORGANISATION
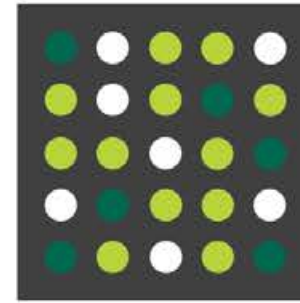
OUR PEOPLE

Our purpose, represents what we are trying to achieve:

OUR PURPOSE

GROWING A SUSTAINABLE ECONOMY SO EVERYONE CAN BENEFIT

TACKLING HEALTH INEQUALITY

ENABLING A GREENER FUTURE

EMPOWERED AND THRIVING COMMUNITIES

Each of these purposes, are encompassed within this plan within our strategic aims and commitments (below section).

This purpose also flows from the Community Vision for Surrey 2030. Created with residents, communities and partners, it sets out how we all want Surrey to be by 2030 and places focus on prevention, supporting our most vulnerable residents and the need for greater collaboration with partners.

Our organisation aims to be one that is outcome driven, working collaboratively for the best outcomes. We aim to help people and communities to help themselves. We maximise the potential of digital and data to transform the way we work and improve accessibility. We seek our preventative, commercial and efficient approaches to help us be financially sustainable.

Our people and culture is inclusive, passionate and values diversity. SCC is a collaborative and inviting place, with trust at its heart, whilst being ambitious and passionate. We are inventive and dynamic, promoting a learning mindset, adaptable to new insights and opportunities.

The Surrey Way, transforms how SCC runs and the culture and behaviours our staff embody, enabling us to add more value, make a greater impact and improve services. This will support in delivering the best possible long-term outcomes for residents while balancing our budget and better managing demand.

We recognise our role in delivering this vision with prevention and protection activities forming a core part of what we do. This plan set out how we will do this.

Our Strategic Aims, Commitments and Activities

Our five strategic aims and supporting commitments outline how we will align and deliver our service to the Surrey Way.

Strategic aim 1.

Support communities to be safe, thriving and resilient through prevention and protection activities.

- **Focus on prevention and protection activities.**
- **Work with partner agencies to ensure we are focused on people, helping vulnerable residents get extra help when it's needed.**
- **Prioritise the highest-risk buildings for fire safety inspections.**

GROWING A SUSTAINABLE ECONOMY SO EVERYONE CAN BENEFIT

TACKLING HEALTH INEQUALITY

EMPOWERED AND THRIVING COMMUNITIES

15

6

6

Strategic aim 1. Support communities to be safe, thriving and resilient through prevention and protection activities.

Prevention

Karen,
Prevention team

Our Prevention Team identify and protect vulnerable people, making them safe in their own homes. We educate children, young adults and other members of our communities on fire, water, road and wildfire safety, which is supported by our brilliant volunteers. We address the behaviours of children and adults on fire setting, in addition to supporting young adults who are at risk of entering the criminal justice system.

We also work closely with our operational crews and key external stakeholders on establishing the cause of a fire.

Dee,
Community Intelligence team

Our Data and Digital team manage SFRS' digital tools and analyse data to support the service on their day-to-day activities and future planning. We provide insights on where risk lies within Surrey to ensure our infrastructure, equipment, and staff are on hand to keep our community safe. Efficient use of resources is vital to ensuring we have the capability to tackle fire and flood prevention, protect our residents and businesses and respond to incidents.

Preventing fires and other emergencies is at the core of our service. We do this in a number of ways and target it towards the most vulnerable people in our communities.

Our approach uses data and risk information whilst working closely with partners to ensure every contact counts. Our specialist prevention teams, firefighters, volunteers and partners maximise opportunities and gain further local information, so we can identify and support people who are most at risk.

How we support those who need most care and attention

By carrying out Safe and Well Visits (SAWV) in people's homes, we can not only give advice but also fit fire detection equipment (such as smoke alarms).

In addition to this, we can facilitate the supply of equipment such as oil filled radiators and gloves during the cold weather. Our teams are also called to homes to provide advice, support and equipment for people experiencing domestic abuse.

We know that we are a pivotal player in public safety and as such, our contact with residents can help them in more ways that fire prevention. Our teams regularly signpost residents to our partners for other needs – such as Trading Standards for scam victims or Adult Social Care for needs such as meals on wheels and many more.

The number of SAWV's completed from referrals into the Partnership Team from other agencies has doubled in the 12 months between 2022/23 and 2023/24 (approximately 1,200 to 2,400 referrals). The total number of SAWV delivered increased by 52% when compared to 2022/23 with 85% of those visits being made to vulnerable people.

We will continue to develop and nurture partnerships with the aim of widening our reach to those most at risk of fire. During this CRMP, we are dedicated to aligning our work with SCC's health agenda, exploring how we can work closely with hospitals and other health professionals to keep people safe.

Page 209

9

Strategic aim 1. Support communities to be safe, thriving and resilient through prevention and protection activities.

Working with children and young people

Educating our younger residents on fire and water safety is vital to developing the future minds of Surrey.

We have a range of targeted activities to educate young people and as trusted role models in the community, our teams are able to join classrooms as well as invite people into our workplaces.

Our aim is to continually improve our offer to supporting young people by working with other partnership organisations such as the Royal National Lifeboat Institution (RNLI) and our own SCC departments such as schools and Childrens Social Care.

We are committed to increasing the number of young people we help. This includes delivering resilience qualifications accredited by The Prince's Trust and working with other youth teams to deliver our specialist advice and information.

Road safety

There are major road networks within Surrey that pose significant risks for communities and therefore road safety is a big priority for the service.

We are part of the Surrey Road Safety Partnership, known as RoadSafe, and we will continue to support the aims of this initiative. As part of that partnership, we are an integral part of the Vision Zero approach to prevent road fatalities and severe injuries on our roads.

In partnership with national organisations, researchers and educationalists we have adopted the DriveFit programme in 2023/24. This is the next step of what was previously known as Safe Drive Stay Alive. The aim of this programme is to significantly improve road safety education for young drivers. We are excited to roll out DriveFit 2.0 during the course of this CRMP.

6

Strategic aim 1. Support communities to be safe, thriving and resilient through prevention and protection activities.

Health and wellbeing in the community

Being part of and promoting compassionate communities is important to us. So far, this includes safety recommendations, work with care partners in the community and support with homelessness and other vulnerable groups.

Our teams work with partners such as One Surrey (smoking cessation) and Bridging the Gap (multiple disadvantage outreach service) to promote healthy lifestyles.

We are committed to working with health partners to ensure that patients can return to their homes after a hospital stay as part of the care they receive from the NHS.

Key to this ambition is working with occupational therapy teams, care providers and local community teams. During the course of this CRMP, SFRS will also embed staff in Surrey hospitals, ensuring every contact counts.

Fire Investigation

Our Fire Investigation team plays a critical role in understanding the cause of fires which can help us to prevent future emergencies occurring through education and behaviour change.

They also work collaboratively with other agencies, such as with Surrey Police and Surrey's Coroner on investigations, as well as Trading Standards and the Office for Product Safety and Standards to keep the public safe from emerging risks such as lithium-ion battery fires.

In addition to this, the team are skilled drone pilots supporting operational incidents. Our Fire Investigation Officers are part of the SFRS safeguarding team which delivers a 24/7 response to keeping those experiencing domestic abuse safe in their homes.

Volunteers

SFRS volunteers support the service with delivering SAWV, hard of hearing visits and community events.

This group also includes our four-legged canine volunteers who are out in the community, with their owners, spotting the signs of wildfires whilst on walks.

The unique selling point of volunteers, is that they are the eyes and ears of the community in which they serve, adding value where they live. Going forward, our volunteers will become a more integrated part of a localised community response to prevention.

To find out how to join our service as a volunteer, please visit www.surreycc.gov.uk/firecareers.

Seasonal safety

Surrey is no stranger to seasonal demand – whether that be flooding or wildfires.

Therefore, working with a range of partners, we will continue to educate landowners and communities on how to prevent these incidents, including how they can better help themselves in an emergency.

Our specialist teams already work closely with land managers/owners to educate them on safety and offer support where possible.

A great deal of investment has gone into signage around 'hot spot areas' and equipment for our crews to tackle wildfire areas.

Information on all of our prevention programmes can be found by visiting SCC's website.

Page 213

6

6

Strategic aim 1. Support communities to be safe, thriving and resilient through prevention and protection activities.

Protection

Craig,
Business Fire Safety team

Our Business Fire Safety teams carry out numerous engagement visits with various businesses throughout the year to enforce the Regulatory Reform (Fire Safety) Order 2005. This can involve us working with local building control bodies during building design and construction phase to give advice on fire safety matters. We also carry out formal inspections to enforce the fire safety order, ensuring businesses are compliant, which will in turn keep employees and customers safe.

Our aims are to help businesses thrive through education, advice and enforcement.

Our protection activities support the businesses we have in Surrey and how we can work closely with owners and those responsible for the buildings in order to keep goods, customers and employees safe.

Our priority is to address immediate risks, whilst proactively working towards preventing fires.

Business Safe and Well Visits (BSAWV)

Similarly to SAWV aimed at keeping residents safe in their homes, BSAWV are delivered by SFRS staff to businesses.

The visits are tailored to lower risk businesses across Surrey and provide advice and guidance on safety and legislative requirements.

Between April 2021 and March 2024, 5,969 BSAWV have been delivered.

We will continue to work closely with those responsible for buildings to have the most up-to-date information about that building so that if they were to experience a fire, our operational teams have as much knowledge on that building as possible.

Risk Based Inspection Programme

Our Risk Based Inspection Programme (RBIP) enables our team to prioritise buildings and businesses, ensuring that those most at risk are the focus for our protection initiatives.

It also allows us to respond to the changing needs and the risk of our premises in Surrey.

6

Strategic aim 1. Support communities to be safe, thriving and resilient through prevention and protection activities.

Automatic Fire Alarms

We attend a great deal of automatic fire alarms to properties, where there is no fire – these are false alarms.

Therefore in 2022, we reviewed when we will attend automatic fire alarms to non-domestic businesses (EG: those that people do not sleep in) and since then we have seen a reduction in attending false alarms to non-residential premises initially by 75%.

This allows our operational crews to be available for emergency incidents, training and importantly more prevention and protection activities to help reduce risk in our communities.

Since March 2024 this approach has been extended to cover all premises types including domestic and residential premises and will continue to review this phase throughout this CRMP.

High rise residential buildings

Following the tragic events of Grenfell Tower, we continue to work with the Responsible Person of high rise residential buildings to ensure compliance with the Building Safety Act 2022 and Fire Safety (England) Regulations 2022 to guarantee that we are provided with all relevant information about a building by the owners.

We are committed to ensuring that our staff remain highly trained with a full understanding of how different buildings can react in a fire. Our focus is on the learning and development of our staff to ensure the best outcomes for Surrey.

Our protection teams support the Building Safety Regulator with specialist staff working with partners to assess high rise compliance and ensure these buildings are safe from fire as part of the Fire Safety (England) Regulations 2022.

Information on all of our protection programmes can be found by visiting SCC's website.

Strategic aim 2.

Be a great place to work, and our people feel valued, supported and highly trained.

- **Create a fully inclusive culture that prides itself on making a difference to our residents.**

- **Prioritise the health and wellbeing of our staff.**

- **Build upon our adopted Core Code of Ethics (from the National Fire Chief Council).**

- **Provide opportunities for all to develop through learning and development.**

GROWING A SUSTAINABLE ECONOMY SO EVERYONE CAN BENEFIT

TACKLING HEALTH INEQUALITY

Strategic aim 2. Be a great place to work, and our people feel valued, supported and highly trained.

People

Sue,
People and Organisational Development (OD) team

Our aim is to enable teams and all of our people to thrive and to develop so that together, we can achieve our strategic aims. Our overarching objective is to ensure that SFRS is a great place to work throughout all stages of employment from recruitment, through to development and retention.

Matt,
Business, Projects and Administration Support team

Our role is to support the organisation with of all their business and administration needs. This can range from being the first point of contact on SFRS's reception, through to specialist tasks such as Freedom of Information requests. We also support on a wide variety of projects and events. The team is a crucial part of the day-to-day running of the service and we pride ourselves on our professionalism and our can do attitude.

Adrian,
Learning and Development team

We are committed to not only training, but also upskilling all staff. Whether that's core competency training for operational staff through to specialist, role specific training for non-operational personnel. Our aim is to make sure that our colleagues throughout all levels of the service are in the best possible place in terms of skills to keep Surrey safe.

Billy,
Health, Fitness and
Wellbeing team

We take a proactive approach to both physical and mental wellbeing of all of our colleagues. Our mission is to empower SFRS staff to maintain their health, fitness and wellbeing and putting their best self forward.

Page 219

People are our greatest asset, and we want to ensure that they are at the heart of what we do as a service.

Health, fitness and wellbeing (HFW)

A healthy workforce is fundamental to our success. By empowering our staff, we aim to foster an understanding culture and a healthy and resilient workforce.

We've focused on Critical Incident Stress Debrief (CISD) training to include more staff, notably those in Joint Fire Control. CISDs provide 24/7 proactive intervention for our own colleagues, crucial for addressing the aftermath of traumatic incidents. We now have 24 members of our staff trained in CISD, enhancing our capacity to support our team continuously.

Additionally, 2023 marked the launch of a Multi-Faith Chaplaincy service, developed in collaboration with our Surrey Police partners, to offer spiritual and emotional support to our personnel as part of our established peer support network.

We have also trained 31 Wellbeing Champions and 17 Mental Health First Aiders within SFRS. These individuals are equipped to provide immediate support and foster a positive work environment, reinforcing our commitment to the overall wellbeing of our team.

With increasing information and research into the dangers of contaminants, we are committed to working with others to support staff wellbeing within this area. This includes, but isn't limited to, ensuring that the fire stations we're rebuilding or redeveloping have a focus on contaminant management.

Strategic aim 2. Be a great place to work, and our people feel valued, supported and highly trained.

6

Culture

Cultural improvement is a huge priority of ours, and we are dedicated to fostering a 'one team' ethic based on trust, where every employee feels empowered and valued.

Our journey so far has seen our cultural improvement journey begin in spring of 2022, with the help of an independent agency specialising in this area who assessed our service, spoke to staff to gain input and provided a range of meaningful recommendations and actions for us to undertake as one team.

In the autumn of 2023, the same agency reviewed our progress and reported positive changes. Their findings showed that we are increasingly upholding our ethical principles, and that our organisational culture has improved.

We have made significant strides in our cultural improvement including:

- Adopting the national Core Code of Ethics as our own values informing everything we do.

- Increasing meaningful engagement between our Service Leadership Team and wider staff.

- Establishing staff networks where employees can discuss subjects important to them and be a part of making improvements.

- Creating robust channels for everyone to feedback, ask questions and get a response.

- Robust mechanisms in place for reporting poor behaviour.

- Confidential 'Speak Up' service put in place for all employees.

- All staff received appropriate level of DBS checks.

Our activity has been recognised by HMICFRS's 2023-2025 report on SFRS which stated: "There is an improving culture, with positive behaviours and values understood and demonstrated."

Our focus for the next five years will be to continue to build upon this work. To do so, we need to undertake another assessment of our current progress and steps required to move forward. We will learn from national news, guidance and best practice to do this and are committed to doing it as one service, together.

We will continue our current engagement and look for ways to enhance open, honest and transparent two-way conversations.

Organisational Development

Continual professional development and clear management support is vital to staff being able to have long and successful careers.

We want to ensure that we are supporting our staff to develop their careers and therefore will continue to embed career pathways by ensuring all staff get the opportunity to discuss with their managers their development within their performance conversations.

Learning and development

We pride ourselves in being able to offer all staff opportunities for continual learning and development – no matter their chosen specialism or career pathway.

Our learning offer is a key component in ensuring that our workforce is skilled, confident in their abilities and motivated at work.

Our key priorities include the use of apprenticeships at all levels of the service, supporting our workforce to learn and thrive through offering a suite of learning experiences and workplace adjustments if required.

Recruitment

Our ambition is to have a workforce that represents the diverse needs of our communities – enabling us to be able to understand more and ultimately, keep people safe.

This will also enable us to address the recommendations made by the HMICFRS in our recent inspection.

Our recruitment is based around values and behaviours, ensuring the best candidate experience possible. We have adapted our recruitment assessments to ensure equal opportunities to all as well as assessing against our Core Code of Ethics.

We will ensure that we are recruiting people with the right values and behaviours, ensuring that we can train high-level skills to be able to carry out their role and putting communities first.

Our current vacancies can be found by visiting our recruitment pages on the Surrey County Council website.

Specialist support teams

We have several specialist support teams who are crucial to the day-to-day running and planning of SFRS.

This includes business support, data and digital, project management and many more. These teams are full of people with a wide range of skills, undertaking behind the scenes work to see improvement projects through and ensure our service can thrive.

We are committed to ensuring a workplace culture where everyone can be themselves, get support or adjustments where needed and where everyone knows that they play an equal role in keeping people safe.

Strategic aim 3.

Build an inclusive workplace, act with integrity and challenge prejudice.

- **Create an inclusive workplace where all feel respected and that they belong.**
- **Build a workforce that is truly reflective of the communities we serve.**
- **Highlight the importance of equality, diversity and inclusion, with no form of bullying and discrimination tolerated.**

TACKLING HEALTH INEQUALITY

EMPOWERED AND THRIVING COMMUNITIES

6

Strategic aim 3. Build an inclusive workplace, act with integrity and challenge prejudice.

Equality, Diversity, and Inclusion (EDI)

Rizwan,
EDI team

We champion equality, diversity, and inclusion across our service. Our role spans from driving inclusive recruitment practices to ensuring a safe and supportive environment for all staff. We provide guidance, promote awareness, and foster a culture where everyone feels valued and respected. Our commitment is to reflect the diverse community we serve and to enhance the wellbeing and effectiveness of our workforce.

Our workforce

We're building an inclusive workplace where everyone feels valued, respected, and supported, regardless of their race, ethnicity, gender, age, sexual orientation, disability, or any other point of difference.

Promoting open communication, teamwork and mutual respect amongst all of our staff is crucial to this.

As a service, we are already delivering regular training programmes to raise awareness about diversity, challenging behaviours and inclusive practices. These programmes equip our staff with the knowledge and skills necessary to create a harmonious and inclusive environment. At the time of writing this plan, 453 employees across 78 teams throughout our service have received banter training sessions enhancing their understanding of EDI and promoting appropriate workplace behaviours.

SFRS has already worked with Vivida, an innovative external training provider, on their 'In Their Shoes' experiential learning programme. This partnership allowed SFRS to be at the forefront of branching this cultural improvement and EDI advancing programme out and into the fire and rescue industry. An initial successful trail with managers has completed and the next stage is training all staff.

During this CRMP, we want to better embed EDI within everyone's role at the start of their career with us.

Our communities

We actively engage with all of the communities we serve, embracing diversity and understanding their needs.

This involves us collaborating with community groups, organisations, and individuals to promote equality, celebrate diversity, and foster inclusion. This ensures that we can create programmes and initiatives that address community concerns and promote social cohesion.

We advocate for inclusive policies and practices within our organisation and in the wider community.

During our last CRMP, we formed a group of community leaders and key stakeholders from a range of different groups. We will now join forces with this group, more regularly, when launching campaigns or projects at differing target audiences in the future.

The aim of this is to ensure positive action or behaviour change is reaching and appealing to them.

We will also work with this group to develop plans and initiatives to attract individuals from underrepresented groups to consider joining SFRS.

Strategic aim 4.

Respond to emergencies swiftly, with a highly professional and agile workforce, focused on saving life and reducing harm.

- **We will work with staff to align working patterns to meet the risk and incident demand of our county, without impacting our offer to communities.**

- **Use data and intelligence to inform our decision making and lessen risks before they escalate.**

- **Give education and advice as part of our prevention and protection activities, and when responding to emergencies.**

- **Provide our staff with the right information and equipment to keep them safe when responding to emergencies.**

- **We will ensure we have a modern, efficient and effective on-call response, encouraging future participation in the fire and rescue service.**

TACKLING HEALTH INEQUALITY

ENABLING A GREENER FUTURE

EMPOWERED AND THRIVING COMMUNITIES

Response

Cameron,
wholetime firefighter

Firefighters are at the forefront of emergencies as well as preparing for them to ensure we are in the best possible position to respond. We also carry out important prevention and protection work by educating people and businesses about how to avoid emergencies at home or in the workplace and what to do if, unfortunately, this does happen. In addition, we often run station events to support charities like The Fire Fighters Charity, whereby we raise tens of thousands of pounds every year.

Tom,
On-Call Support team

On-call firefighters are local heroes who support Surrey communities. We could be delivering day-to-day activities like primary employment or school runs, whilst being ready to respond to an emergency via pager at any moment. We feel a great amount of pride in supporting Surrey as an on-call firefighter and keeping your local fire engines 'on the run'.

Lorraine,
Joint Fire Control

Our team work in Joint Fire Control take a diverse range of emergency calls and mobilise to incidents on behalf of Surrey, West Sussex and East Sussex Fire and Rescue Services. In Surrey, we proactively call challenge to ensure that our teams are only sent to emergencies, rather than false alarms. Our highly skilled control operators have extensive knowledge and understand the counties well in order to deliver the best possible service.

Page 227

6

6

Strategic aim 4. Respond to emergencies swiftly, with a highly professional and agile workforce...

Response teams

We currently have 18* wholetime fire stations, seven on-call fire stations/units and other workplaces around the county (including our headquarters and training centre in Reigate).

Each of the fire stations are made up of different crewing types and shift patterns (please see the glossary for more information on this). Our response model sets out where we've located fire engines and crews and when they're available for emergencies. Our fire stations use different crewing and shift patterns depending on the need of the community, risks they face and the balance of fire and rescue cover across Surrey. However, the way in which we work ensures that the nearest, quickest and most appropriate fire engine will be sent to an emergency.

Our response teams are also a big part of ensuring that we can deliver prevention and protection to our communities, working alongside other specialist teams (such as our Fire Investigation Team, Business Fire Safety Team and many more).

* During the course of this CRMP we will be conducting an extensive review to find a site for Banstead Fire Station.
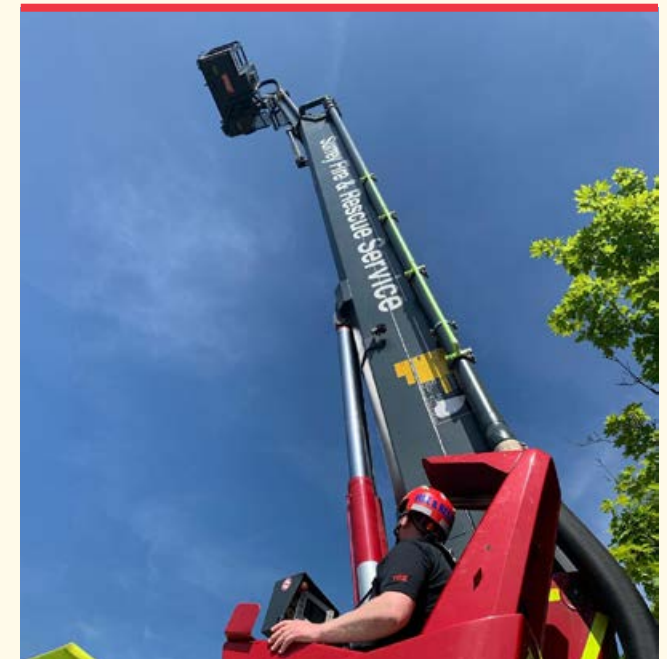
Response times

While there are no national 'response targets' for fire and rescue services, we consistently meet or exceed our own targets (which we refer to as the Surrey Standard).

Within our most recent inspection by His Majesty's Inspectorate of Constabulary and Fire & Rescue Services (HMICFRS), they highlighted that our response times are well within the typical national range.

Surrey Fire and Rescue Service response targets:

Critical incidents		Other emergencies
First fire engine	**Second** fire engine	**First** fire engine
less than **10 mins**	less than **15 mins**	less than **16 mins**

6

Strategic aim 4. Respond to emergencies swiftly, with a highly professional and agile workforce...

Joint Fire Control

Our Joint Fire Control (JFC) team members are a crucial part in our operations.

Their knowledge and expertise ensure intelligence-led mobilising and response to each emergency using the skills, knowledge and technology available within this team.

Later that year, in November 2021, our JFC began mobilising for East Sussex Fire and Rescue Service, as well as ourselves and West Sussex Fire and Rescue Service.

In 2021 we enhanced our resilience with a state-of-the-art secondary control room, providing business continuity and additional training facilities for all three counties.

Our operational staff work on various shift systems. They crew fire engines and other specialist vehicles capable of tasks beyond a fire engine's scope, such as water rescues.

We will continue to work closely with our JFC partners to increase collaboration among our three services, in terms of adopting national guidance and ways of working to ensure delivering best service on behalf of communities.

Our colleagues within this team have become one team over the last few years, focusing on continuous improvement. Following welcoming East Sussex Fire and Rescue Service to Joint Fire Control, we conducted a review of the effectiveness and efficiency of JFC and value for money. This next stage will see us working closely as a partnership to deliver these recommendations.

We will continue to lead from the forefront with our technology. The mapping programme we use to mobilise crews and equipment was made available to all crews in 2024, allowing them to see the wider county picture in terms of crewing. Our mobilising system is due for renewal during this CRMP, we will look to enhance our software available to ensure that our dynamic crewing nature can continue to function in the best way possible.
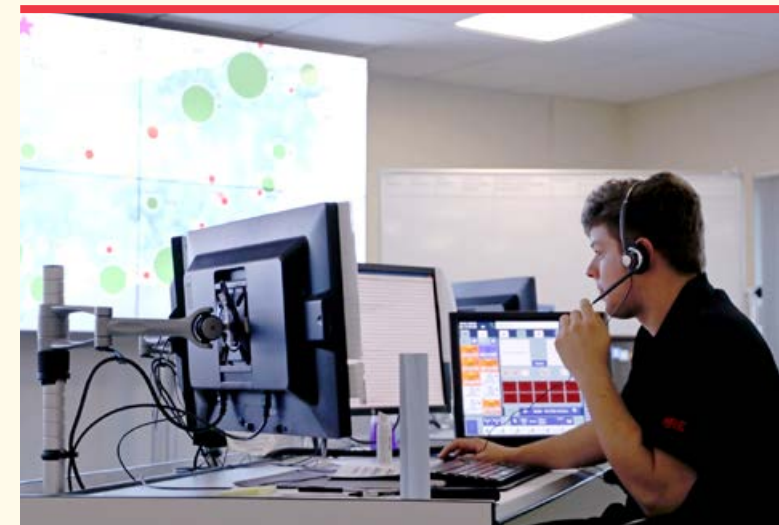
Kit and equipment

A key part of responding to risk is the development and maintenance of a state-of-the-art equipment and specialist assets.

This is done through the continuous evaluation and enhancement of firefighting tactics and equipment innovation, for example our new drone technology, wildfire and flooding equipment, needed to meet evolving challenges and emerging risks.

Our workshops team work hard behind the scenes to ensure that the response teams are well equipped to deal with a range of emergency incidents.

Keeping up with the latest developments in firefighting technology and techniques is essential in maintaining a cutting-edge approach to our operational response. This is maintained through planning, understanding risk and regular training exercises, to ensure that the team is well-equipped to handle diverse emergency scenarios.

Some examples of the new kit and equipment we are looking to introduce are:

- Emergency cut-off plugs and fire blankets for electric vehicles,

- Enhanced cutting and spreading tools for Road Traffic Collisions (RTC)

- Ancillary RTC equipment such as casualty sheets, reciprocating saw blades, sharps covers and new disc cutting equipment.

Additionally, we also collaborate with other blue light partners, agencies and stakeholders, creating partnerships that strengthen the overall emergency response to Surrey.

Strategic aim 5.

Make best use of our resources and deliver a service that provides value for money.

- Embrace our environmental responsibilities.

- We will ensure our fire engines and equipment are fit for purpose, sustainable and support our environmental responsibilities.

- Ensure that our workplaces are appropriate and fit for the future.

- Embrace technology and data to enable improved, intelligence-led outcomes.

GROWING A SUSTAINABLE ECONOMY SO EVERYONE CAN BENEFIT

ENABLING A GREENER FUTURE

Embracing environmental responsibilities

We are committed to integrating environmental considerations into our operations.

This means not only complying with regulations but actively seeking ways to reduce our carbon footprint, working within the SCC Net Zero strategy and reviewing impact on the environment. All of our work is considered with sustainability in mind, making sure we are utilising the best technologies and practices to meet this need, whilst maintaining effectiveness.

Ensuring fit-for-purpose and sustainable fire engines and equipment

We will continue to prioritise the selection of fire engines and equipment that meets our operational needs and also aligns with our sustainability goals.

This could include exploring innovations such as electric or hybrid vehicles and using extinguishing materials with lower environmental impacts (such as the use of foam).

Since our last CRMP, we are in the process of introducing 20 new Advanced Technology fire engines to our service. We have specified a large proportion of the equipment on the new appliances to standardise across our whole fleet, which means we can re-use existing equipment from the replaced vehicles and reduce the variation of stock levels held for our fleet such as delivery branches, battery operated tools (with a single battery type), battery powered fans for smoke clearance.

The vehicles themselves are also fitted with the latest Euro 6 engines, the bodywork is mostly aluminium (which can be recycled) and the appliances carry more water than our older vehicles, which can reduce the number of appliances required to attend an incident.

6

Strategic aim 5. Make best use of our resources and deliver a service that provides value for money.

Creating appropriate and future-ready workplaces

Our workplaces play a vital role in our ability to deliver an effective service.

We will continue to invest in our fire stations to ensure that they are not only functional and safe but also adaptable to the evolving needs of our communities and our own working practices. This involves energy-efficient building designs, renewable energy integration, and flexible layouts that continue to promote collaboration and efficiency in working practices and shared spaces.

Sustainability and environmental responsibilities are a key focus for each of our fire station redevelopments projects. For example, we are currently exploring air source heat pumps (which transfer heat from the outside air to water to heat the property) and photo voltaic panels on roofs (similar to solar panels, but instead of converting solar radiation to heat, they convert thermal energy to electricity), with the aim of improving our carbon footprint.

Three new fire stations will also be opened (replacing the current Reigate, Chobham and Lingfield stations). These developments will improve workplaces for our teams, and in turn, support us to keep our communities safe.

In addition, during this CRMP, our new £14.5million training facility will be up and running – keeping SFRS up to date with the most modern facilities, contaminant management and further improve upon our statutory training requirements. These upgrades will allow us to drive forth our standards, with an aim to lead the way in fire and rescue service training. We will also be aiming to create income opportunities through the delivery of domestic and international training.

The facility, which will be located in Reigate, will include an air capture and scrubbing plant, which could potentially remove 95% of particles and dangerous gases created by the burning of carbonaceous materials, as part of firefighter training, produced by the facility.

All of our building works are in line with Surrey County Council's Climate Change strategy. We are working closely with our Land and Property colleagues to ensure that we are considering the whole building lifecycle, reducing our carbon footprint and improving circumstances for local residents and staff working here.

Embracing technology and data for improved outcomes

Technology and data underpins everything that we do, ensuring that we have evidence and insights aiding our decision-making.

We will continue to review IT systems for the delivery of prevention and protection activities as well as in our emergency response. Some examples include:

- investment in our mobilising system used within JFC,

- devices to support more flexible working on the fireground in order to support and enable firefighters in their role,

- body-worn cameras for some staff members to support not only operations and evidence gathering, but also learning and development – such as in fire investigation, to aid evidence gathering and the safety of our crews,

- enhanced risk information available to firefighters and to inform our CRP.

As one of the first fire and rescue service in the country to use the new nationally designed Multi-Agency Incident Transfer system, allowing the transfer of critical information between emergency response agencies. We look forward to seeing others join this programme to provide even greater response capabilities at our incidents.

We aim to be at the cutting edge of technology in the fire service sector, with a focus on intelligence-led decision-making. By harnessing the power of data, we can make informed decisions that not only reduce risk but also enhance the safety of our firefighters.

We're looking into more integrated technology, aligning with some of our neighbouring fire and rescue services, to enhance operations and communications on the fireground.

Community Risk Profile insights

During the planning of our proposals and consultation in 2024, we utilised our CRP (2023) as that was the most up-to-date data at that time. As our CRP is updated annually, we have now also reviewed our CRP 2024 data to ensure that our changes set out in this document are still appropriate.

Our CRP (2024) showed us similar risk and incident demand data as the previous version. We will continue to update on an annual basis to ensure that our organisation aligns to risk.

We've placed some key highlights from our most recent CRP over the next few pages.

Page 236

People

People vulnerable to fire:

The following factors affect a person's vulnerability to fire to the risk of injury or death.

- Smokers in their home.

- Is 65 or older.

- Lives alone.

- Has limited mobility, a hearing impairment or is blind or partially sighted.

- Would have difficulty responding to, or escaping from, a fire.

- Has had a fire previously or shows signs of burns or scorching in the home.

- Has learning disabilities.

- Is supported by family, carers and friends.

- Shows signs of neglect or abuse by others.

- Has a mental health condition such as dementia or depression.

- Has drug or alcohol dependencies.

- Doesn't have an alarm in all areas where a fire might start.

- Collects or hoards in their home.

- Shares a home with a child or young person who sets fires.

SFRS considers these to be indicators of vulnerability to fire and will target these individuals working to the NFCC Person Centred Framework (Person Centred Framework Guidance - NFCC). These vulnerabilities are risk rated so that SFRS can provide directed support.

Smoking:

Smoking materials accounted for only 8% of all accidental dwelling fires but were involved in 35% of fire fatalities.

The biggest cause of fires starting in England was cooking appliances, which caused 44% of accidental dwelling fires.

The increasing number of elderly residents and residents with health issues means the number of people likely to have accidental dwelling fires and be more impacted by those fires is growing.

Places

Road traffic collisions (RTCs):

Though numbers of RTCs have reduced in the last few years Surrey has more RTCs than average in the country and younger drivers are over-represented in the casualties. Surrey's roads carry almost double the national average amount of traffic and the county has more cars per mile of road than any other non-metropolitan counties.

Risk of wildfires:

Around 15,500 hectares of land have been identified as a wildfire risk, this is equivalent to 155 square kilometres or almost 60 square miles. While numbers of wildfires have remained fairly consistent, their severity has increased in the last five years. Looking further ahead climate change is likely to have an impact on wildfire by increasing intensity and frequency of hotter and drier summers.

Flooding:

Surrey is vulnerable to flooding in many areas, by river water and surface water (local flooding of the drainage networks when overwhelmed by intense rainstorms). Looking further ahead climate change is likely to have an impact on flooding by increasing intensity and frequency of rainfall.

Rescues from water:

Between 2010 and 2022, SFRS responded to 4317 water-related incidents and 502 rescues took place. Sadly, this resulted in 62 fatalities across all those incidents. For context, there were 71 fire deaths in the same period.

Premises

Commercial premises:

Data shows us the location of commercial premises that are most likely to have a fire, or where the consequences of a fire will be most serious or require special firefighting strategies. Having detailed information about the location and layout of particular buildings, such as heritage buildings and high-rise buildings, helps us plan to mitigate the effects of fire.

Our analysis of historic incidents and data enables us to identify types of premises that might be at an increased risk of fire. We take this into consideration when we are planning our business safety activities aimed at preventing fires in commercial premises.

The fact that the proportion of fires in higher-risk premises where we focus our business safety and inspection activity is less than in medium to low-risk premises suggests that our activity is succeeding in reducing the number of fires.

For small businesses or less complex premises, we offer a simple Business Safe and Well Visit (BSAWV). During the visit, we will discuss existing fire safety arrangements and if required, of if there are any concerns we will direct you to further sources of help and support, which may include a specialist fire safety officer to contact you and arrange a second visit. Specialist officers will provide further support and where necessary enforce the Regulatory Reform (Fire Safety) Order 2005.

A significant proportion of all incidents to which the service is called to are fire false alarms due to equipment. The actual number of fire false alarms has remained fairly consistent over the last five years but continues to decline.

Products

Broader risks

Products that cause fires:

Understanding which products have caused fires enables the service to educate and inform residents about their safe use and to get dangerous products withdrawn from sale.

The following factors are identified as the cause of accidental dwelling fires:

- 29% due to misuse of equipment or appliances (safe products, but unsafe use).

- 15% due to placing articles too close to heat (safe products, but unsafe use).

- 5% due to chip/fat pan fires (safe products, but unsafe use).

- 14% due to faulty appliances and leads (unsafe products).

- 10% due to faulty fuel supplies (unsafe products).

Emerging risks:

We are aware of new products and technologies that we expect to have a significant impact on the service in future, these include alternative fuels, automated carparks, modern building techniques, battery storage facilities, electricity generation and electric vehicles.

Aside from the four P's described above we also use the CRP to monitor broader risks. These are summarised in the CRP but briefly consist of national and local risk registers and major development within Surrey.

More information on this can be found in our CRP.

Community and staff input into this plan

As a service, we were really keen to ensure that communities, partners and our own staff were involved in the development of this plan.

There were a number of ways that we encouraged them to share their ideas and views. This included:

Community and staff survey:
This helped shape our proposals for change. We understood what residents were most concerned about and how they felt about our service.

We received 1,114 responses to our survey. A full report of the findings from our Community Survey is available on our website: www.surreycc.gov.uk/CRMP.

Focus groups with residents:
These groups enabled us to gather valuable research and insights. We welcomed people from a range of underrepresented communities across Surrey. This ensured that we captured the unique perspectives and insights from diverse segments of our community, providing greater detail by utilising respondents' own words and experiences. These shared experiences helped us develop the CRMP proposals with community concerns in mind and built a relationship with these communities moving forward.

Staff engagement and feedback survey:
This enabled our staff to provide feedback, ask any questions they may have and better understand the proposals.

Stakeholder engagement sessions:
We met with a number of groups to understand how our proposals could impact the communities that they represented. This included groups with protected characteristics as well as Trade Unions and more.

Consultation and roadshow events:
Around 35 events took place across the county during our consultation period to ensure we could answer questions from residents and encourage them to take part in the consultation.

You can find a full analysis report of our consultation responses by visiting SCC's website.

Ensuring you can trust our process

We've involved external organisations to examine our information and confirm that our consultation process is good and thorough.

Nottingham Trent University

During the pre-consultation phase we worked with Nottingham Trent University (NTU), leaders in the field of public research and who have already led on the National Fire Chiefs Council's (NFCC) National Risk Methodologies, which helps to meet requirements for developing a CRMP.

NTU reviewed our data and evidence used to develop the strategic aims and proposals for our CRMP.

Surrey Fire and Rescue Service has undertaken a robust process... We are assured that the process undertaken has not only reflected the requirements of the Community Risk Profile but also goes further to ensure it fits within the wider strategic objectives of Surrey Fire and Rescue Service, Surrey and partners for Surrey.

Nottingham Trent University

We've included the feedback from NTU in our latest CRP 2024.

The Consultation Institute (tCI)

We also worked with tCI, to achieve a Certificate of Consultation Readiness. This offers assurance that we have met certain quality requirements which align with the tCI Consultation Charter and are in a position to proceed to public consultation.

Service changes for 2025-2030
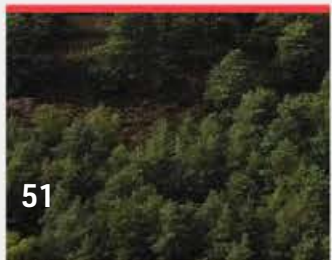
Spelthorne

Runnymede

Elmbridge

1. Balance our prevention, protection, and response resources to ensure that Surrey is a safe place to live, work and do business.

1.1: **We will be relocating the current Banstead fire engine and crew to Godstone Fire Station, following an updated and extensive review of any options within the Whyteleafe area**
This will be delivered in stage 1 (of 3 stages) during this process.

- Whyteleafe has been identified as the most appropriate location for relocation of resources however a previous review showed that there was not an appropriate site within this area.

- SCC and SFRS will be conducting an updated, extensive review of this area **in case any possible locations become available** that are appropriate and affordable.

- A lease extension to 2026 has been agreed with the owners of Banstead Fire Station to allow this to take place. However, the site will be sold after this and therefore we must vacate the site at the end of 2026.

- Godstone Fire Station is the most appropriate alternative providing a good balance of cover county-wide. Therefore, refurbishments to Godstone Fire Station will take place whilst the review is undertaken.

- SFRS will ensure that a programme of prevention and protection activity will continue to take place following this relocation, in addition to an ambition to continue supporting community events where possible.

1. Balance our prevention, protection, and response resources to ensure that Surrey is a safe place to live, work and do business.

1.2: **We will review the capability and locations of specialist vehicles and equipment to ensure they match the current and potential risks effectively.** *This will be delivered in stage 1 (of 3 stages) during this process.*

- This will include a review of all specialist vehicles and equipment, also considering those utilised for climate-related incidents such as wildfires and water rescue.

- Creating 'fire stations of specialism' aligned to risk, will be considered as part of this review.

1. Balance our prevention, protection, and response resources to ensure that Surrey is a safe place to live, work and do business.

1.3: We will review current resources at Camberley Fire Station and consider relocation options within the boroughs of Spelthorne, Elmbridge and Runnymede. *This will be delivered in stage 2 (of 3 stages) during this process.*

- Due to updated-risk within the north of the county and our resources already in place, we will be considering Runnymede in this review, alongside Spelthorne and Elmbridge, for the relocated staff providing night-time cover.

- Consultation feedback supported the risk-based inclusion of Runnymede as an option.

- Any final decision on the station gaining night-time cover will be aligned to risk.
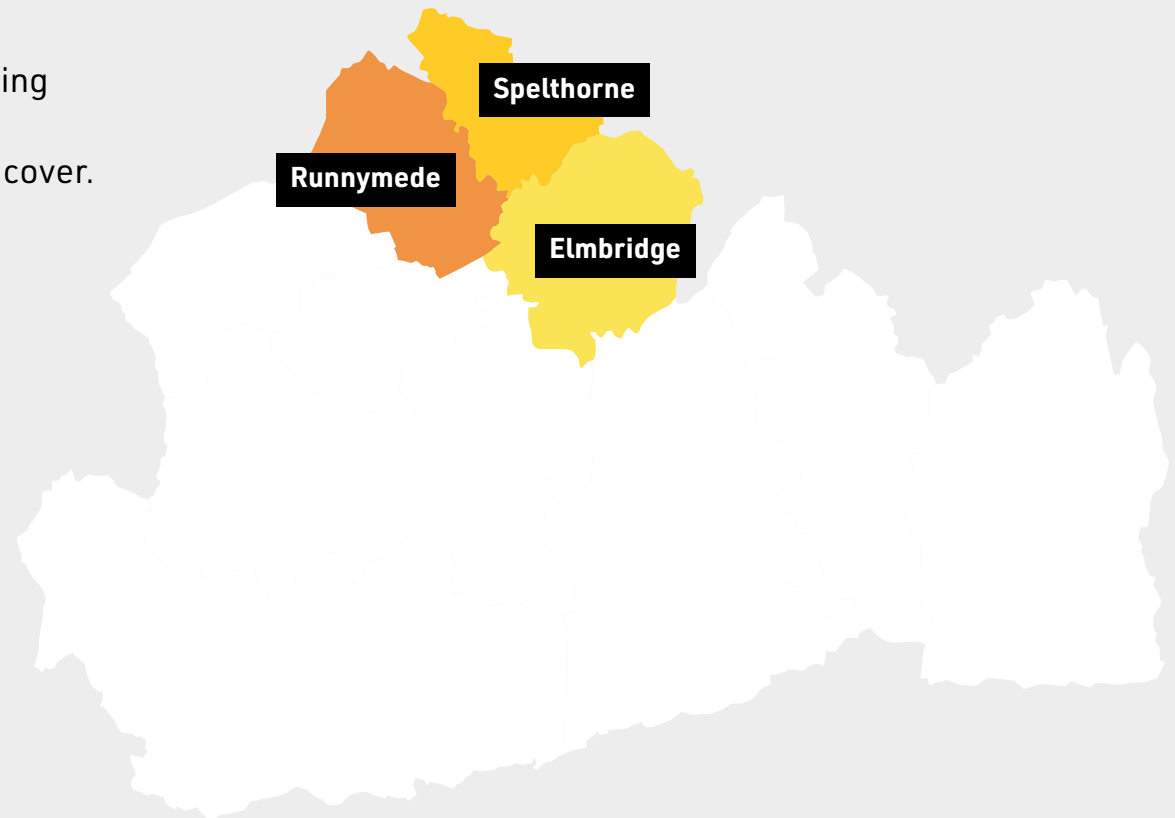
Spelthorne

Runnymede

Elmbridge

2. Ensure we have the right resources in the right place and at the right time by better understanding risks that face our communities.

2.1: **We will develop a response model which responds to changing risk and seasonal demand (such as heightened periods when we see incidents as a result of summer or winter-specific emergencies).** *This will be delivered in stage 1 (of 3 stages) during this process.*

This additional response support will not be aligned to specific months, it will be formed as a model that can be 'stood up' in addition to usual response arrangements, should it be required.

- The aim of this is that it will not be assigned to specific months and will provide additional layered resilience when its needed (EG: November-January for flooding and June-August for wildfires).

- We will work with staff and other stakeholders on what this looks like.

Page 247

2. Ensure we have the right resources in the right place and at the right time by better understanding risks that face our communities.

2.2: We will adapt our on-call weekend plan to better respond to risk. *This will be delivered in stage 1 (of 3 stages) during this process.*

- This change means that Chobham, Lingfield, Dunsfold, Guildford and Gomshall's on-call fire engines will no longer be required to be made available at weekends during the day.

- The crews here will be required to dedicate their contracted hours into evenings, when they are most needed to align to risk.

- This will not change our fire engine availability targets of 20 in the day and 16 at night.

- This change has close links to changes 2.4 and 1.2 and therefore will run in tandem with them.

2. Ensure we have the right resources in the right place and at the right time by better understanding risks that face our communities.

2.3: We will adapt existing prevention, protection and response arrangements in Haslemere to ensure the most appropriate resources. *This will be delivered in stage 3 (of 3 stages) during this process.*

- Haslemere currently has a day-time fire engine (7am-7pm) seven days a week and an on-call fire engine which can be made available nights and weekends.

- This will ensure that Haslemere Fire Station remains open, with 24/7 availability, however being mindful that the current level of risk and demand is much lower than other fire stations with this resource.

- We will work with staff and other stakeholders on what this looks like.

Page 249

3. Identify and develop more opportunities to keep our communities safe through prevention, protection and partnership activities.

3.1: **We will work with our health partners to respond to those who are most vulnerable in Surrey.** *This will begin to be delivered in stage 1 (of 3 stages) during this process.*

- Whilst national conversations and negotiations continue surrounding co-responding, SFRS will continue to develop relationships and scope opportunities for partnership working.

- This will be much broader than co-responding and therefore require a whole-service approach. It could include, but is not limited to, supporting with non-emergency calls such as falls, supporting with hospital discharges and more.

How to stay up to date

Keep up to date with all SFRS news and information by following us on social media:

- facebook.com/**SurreyFRS**
- x.com/**surreyfrs**
- instagram.com/**surreyfrs**
- linkedin.com/company/**surrey-fire-and-rescue-service**
- tiktok.com/**@surreyfire**

Page 25

Accessibility

If you would like this information in an alternative format or language, please contact us on:

Telephone: **03456 009 009,**
Text (SMS): **07860 053465**

Textphone (via Relay UK):
18001 03456 009 009

British Sign Language:
www.surreycc.gov.uk/bsl

Email: **contact.centre@surreycc.gov.uk**

إذا كنت بحاجة إلى هذه المعلومات بتنسيق أو لغة بديلة فيرجى الاتصال بنا

আপনার যদি বিকল্প ফর্ম্যাট বা ভাষায় এই তথ্যের প্রয়োজন হয়, অনুগ্রহ করে আমাদের সাথে যোগাযোগ করুন।

就有关资料，如需要其他模式或语言版本，请与我们联络。

就有關資料，如需要其他模式或語言版本，請與我們聯絡。

Si vous avez besoin de ces informations dans un format où langue différente, contactez nous s'il vous plaît.

Se avete bisogno di queste informazioni in un formato o in una lingua alternativa, vi preghiamo di contattarci.

Jeśli potrzebujesz tych informacji w innym formacie lub języku, skontaktuj się z nami.

Se você precisar dessas informações em um formato ou idioma diferente, entre em contato conosco.

جے تانوں اے معلومات کسی ہور زبان یا کسی ہور طریقے چے چائیے تہ ساڈے نال رابطہ کرو۔

Daca doriti ca aceasta informatie sa va fie trimisa in alt format sau alta limba,va rog sa ma contactati.

Si necesita esta información en otro formato o idioma, por favor contáctese con nosotros.

اگر آپ کو یہ معلومات کسی متبادل شکل یا زبان میں درکار ہے تو براہ کرم ہم سے رابطہ کریں۔

Community Risk Management Plan Consultation Analysis

Introduction

Surrey Fire and Rescue Service (SFRS) are preparing their statutory service plan, the Community Risk Management Plan (CRMP), for 2025-2030. This five-year plan sets out identified fire and safety risks in Surrey as well as how resources will be implemented to meet and mitigate these risks.

A key aspect of this plan was to present elements of the CRMP to Surrey's residents, those travelling through/working in and SFRS staff so that they can help shape the plan as part of a statutory consultation.

As part of the CRMP timeline, the final analysis of the CRMP Consultation Survey was completed by the Research Intelligence Unit (RIU) for a Service Leadership Team workshop in September.

Methodology

The consultation survey was hosted on Surrey County Council's (SCC) Surrey Says survey platform and remained open for a 3-month period.

Initially launched on Tuesday 7 May 2024, the consultation survey was paused between midnight on Monday 27 May 2024, until midnight Thursday 4 July 2024, due to legal and governance advice following announcement of the 2024 General Election. Public responses were not accepted during this period, however, SFRS staff were able to provide their feedback during this period via a staff only duplicate consultation survey. This resulted in the deadline for all consultation responses was subsequently extended to midnight on Friday 6 September, to ensure a full 3-month consultation for the public.

A mixed methods approach was undertaken to capture residents' feedback using numbers (residents' ratings, levels of agreement) and words (residents' open text comments) for greater rigour, deeper insight, and more robust findings.

A total of **511 residents and staff** took part in the SFRS CRMP 2024 consultation.

Survey completion rate

A survey's "completion rate" compares the number of respondents who completed the CRMP consultation survey with the number of residents who started but abandoned the survey before completion. Whilst these figures are only indicative (e.g. it's not possible to identify returning respondents) the surveys' completion rates (below) are highly favourable when considering research industry standards (e.g. surveys of 15+ questions typically obtain 41.9% completion rates, Survicate, August 2024) and positively reflects on consultation survey quality, and its ease of completion for participating residents and staff.

The main CRMP consultation survey (for both public and staff) saw a completion rate of 51.4% (511 complete surveys to 484 incomplete survey responses).

The staff-only CRMP consultation survey (for SFRS staff only) saw a completion rate of 56.4% (93 complete to 72 incomplete).
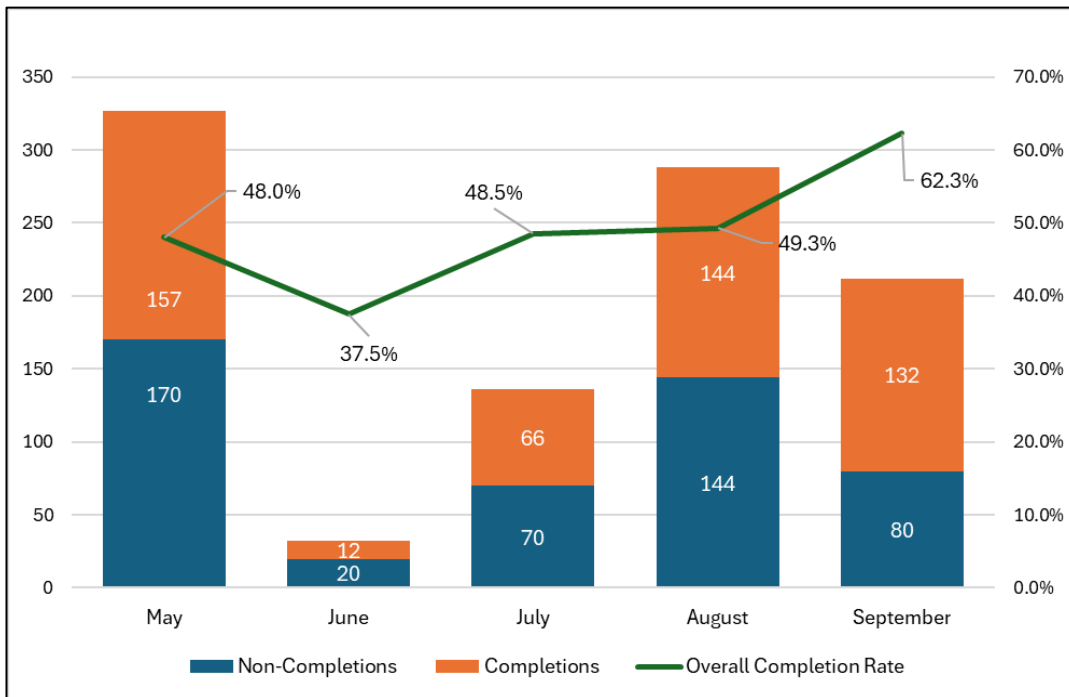
A survey's "response rate" compares the number of responses obtained with the size of the population of interest. The SFRS Staff response rate was 20.4% (143 responses from ca. 700 employees) which is deemed acceptable according to research industry guides of 5-30%, and approaches an excellent response level (Kantar, n.d.). For the overall CRMP Consultation (public and staff) response rate estimates were not feasible because of sample parameter fluidity. However when compared to other Surrey County

3

Council (SCC) county-wide surveys (e.g. the 2023-2024 Draft Budget Survey), the response level is good.

Who we heard from

In answer to the question 'what is your connection to Surrey?' residents were invited to select more than one answer to capture cases where an individual might both work and live in Surrey.

What is your connection to Surrey?

- I live in Surrey (n=413) — 53.9%
- I work in Surrey... — 29.8%
- I visit Surrey (n=43) — 5.6%
- I own a business in... — 2.9%
- I commute through... — 7.8%
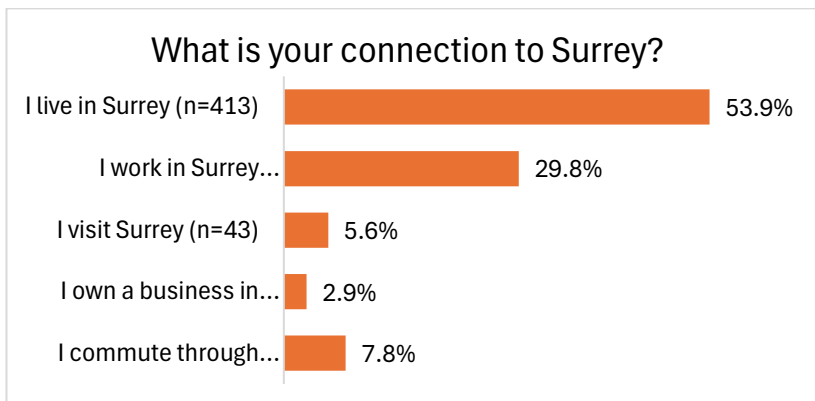
In answer to the question 'do you or a family member work for SFRS?':

Do you or a family member work for SFRS?

- 2.9%
- 28.0%
- 69.1%

- No (n=353)
- Yes - I currently work for SFRS (n=143)
- Yes - a family member currently works for SFRS (n=15)
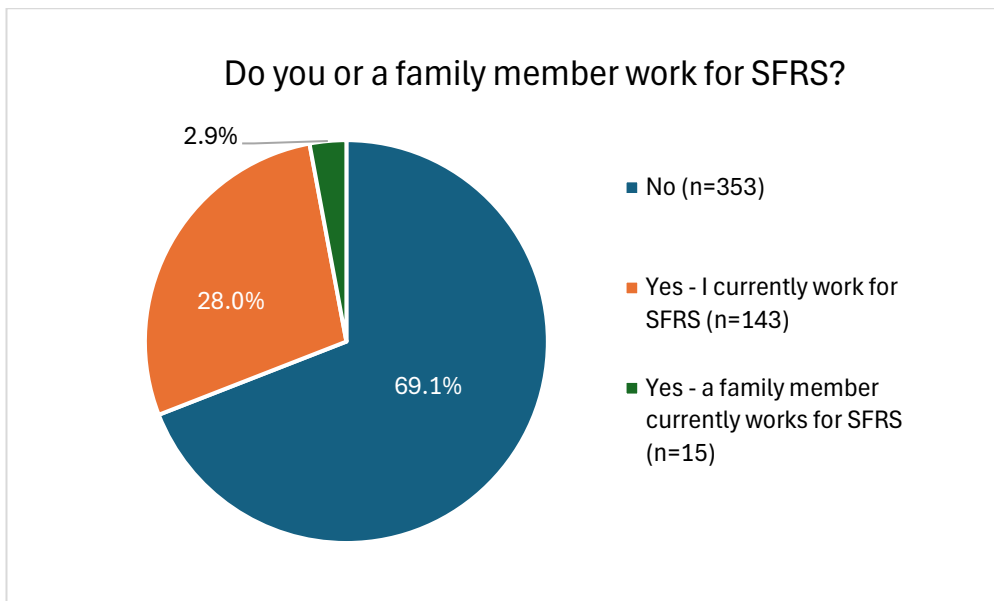
In answer to the question relating to the respondents post code we found:

- 17.2% from Guildford
- 11.1% from Banstead
- 11.1% from Kingston-upon-Thames
- 6.9% from Redhill and Reigate

4

- 4.6% from Tadworth
- 2.7% from Camberley
- 2.3% from Cranleigh
- 2.3% from Horley
- The remaining 41.7% were from post codes below 10 responses.
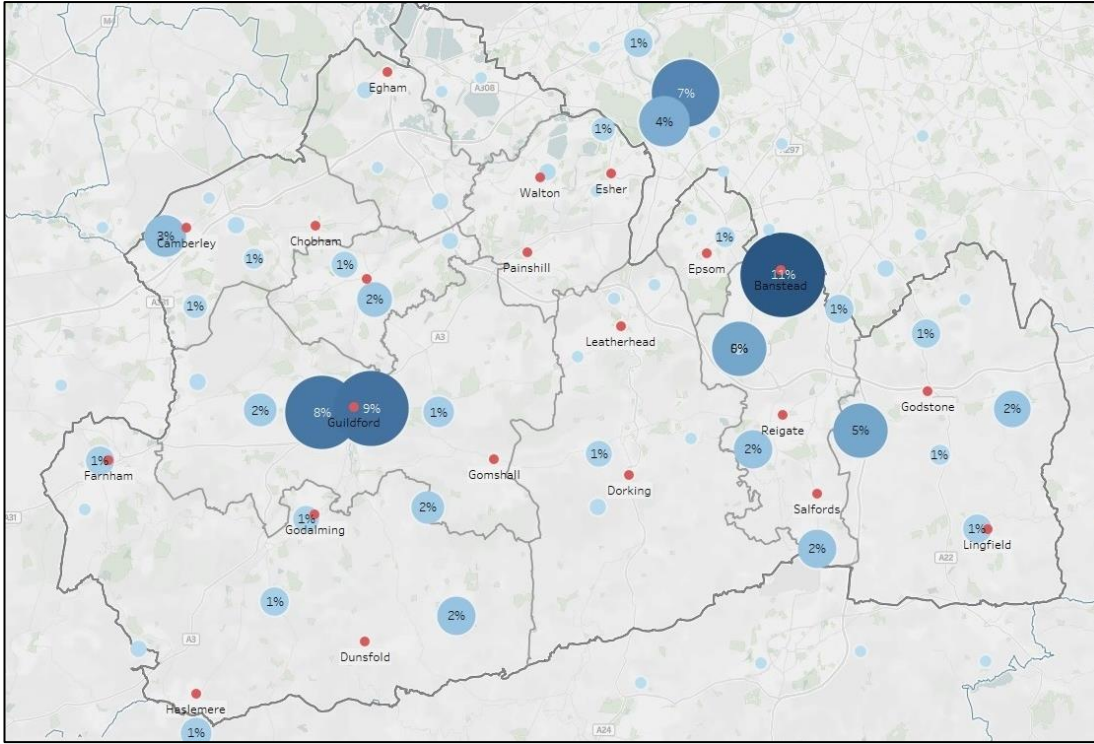
In relation to age, we saw the below responses:

Age Groups (CRMP Consultation vs. Census 2021)

Age Group	CRMP Consultation 2024	2021 Census
under 18 years (n=8)	1.6%	12.5%
18-24 years (n=28)	5.5%	11.1%
25-34 years (n=74)	14.5%	11.3%
35-44 years (n=82)	16.0%	13.6%
45-54 years (n=123)	24.1%	14.5%
55-64 years (n=96)	18.8%	12.7%
65-74 years (n=67)	13.1%	9.6%
75-84 years (n=23)	4.5%	3.7%
85 years + (n=5)	1.0%	5.6%
Prefer not to say (n=5)	1.0%	

■ CRMP Consultation 2024   ■ 2021 Census

5
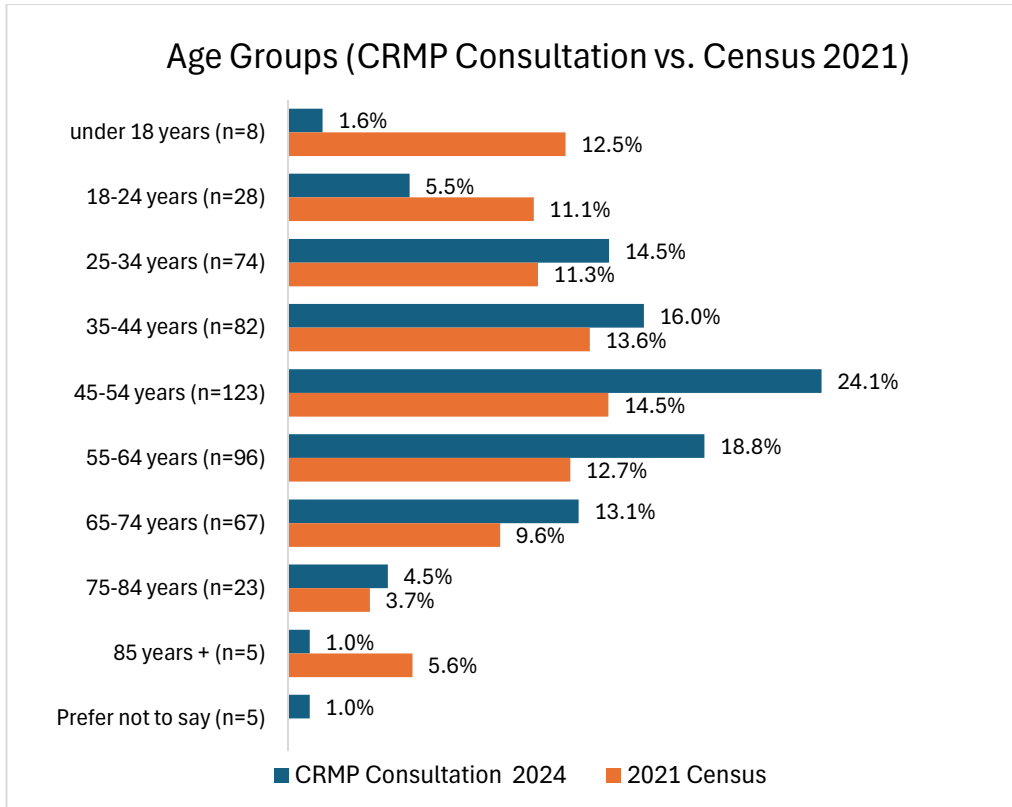
Respondents with a long-term illness or disability status saw a response rate of:

Long-term Illness or Disability Status

- Yes (n=41): 8.0%
- No (n=410): 80.2%
- Prefer not to say (n=55): 10.8%
- Not answered (n=5): 1.0%
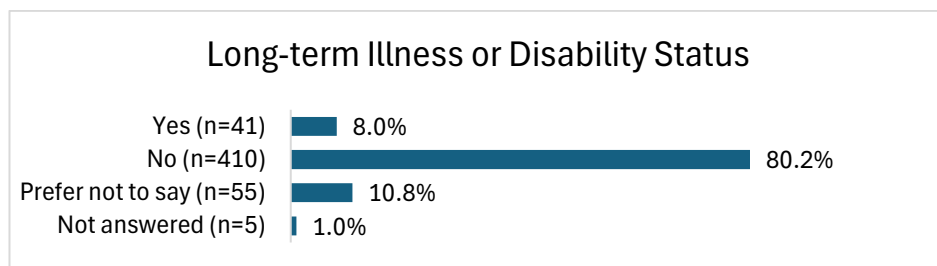
In terms of sexual orientation, we saw responses from:

Sex / Gender (CRMP Consultation vs. Census 2021)

- Female (n=195): 38.2% (CRMP Consultation 2024), 51.3% (Census 2021)
- Male (n=263): 51.5% (CRMP Consultation 2024), 48.7% (Census 2021)
- Other (n=3): 0.6%
- Prefer not to say...: 9.8%

■ CRMP Consultation 2024 ■ Census 2021
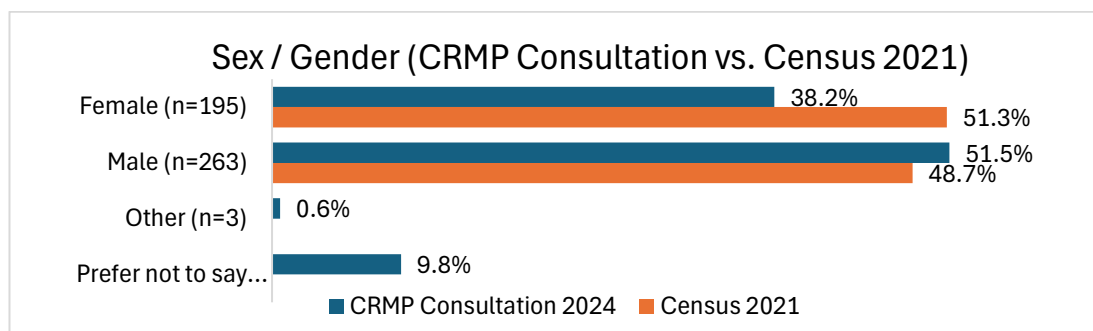
Ethnicity saw the below response rate:

- 76.1% White – British, English, Northern Irish, Scottish or Welsh
- 1.4% White – Irish
- 0.4% White – Gypsy or Irish Traveller
- 3.1% other White background
- 1% any other mixed or multiple ethnic background
- 0.4% White and Asian
- 0.2% White and Black African
- 0.2% White and Black Caribbean
- 0.8% any other Asian background
- 0.8% Asian or Asian British – Bangladeshi
- 0.6% Asian or Asian British – Indian

9

Communications and engagement activity

To encourage resident participation with the CRMP Consultation a range of communication and engagement activities were conducted both online and in the community at roadshow events across Surrey. The campaign, in numbers, is outlined below:

38 roadshow events with the public and other stakeholders throughout all 11 District and Boroughs, specialist sessions in the areas named within the proposals.

86 organic (not paid-for) social media posts via Facebook, Instagram, LinkedIn and X (formerly Twitter), which resulted in:

- 57k people reached
- 6.4k video views
- 995 link clicks

8 targeted social media adverts via Facebook, Instagram and Snapchat, which resulted in:

- 67.6k people reached
- 20.2k video views
- 2.3k link clicks

852 views of the Chief Fire Officer's press article.
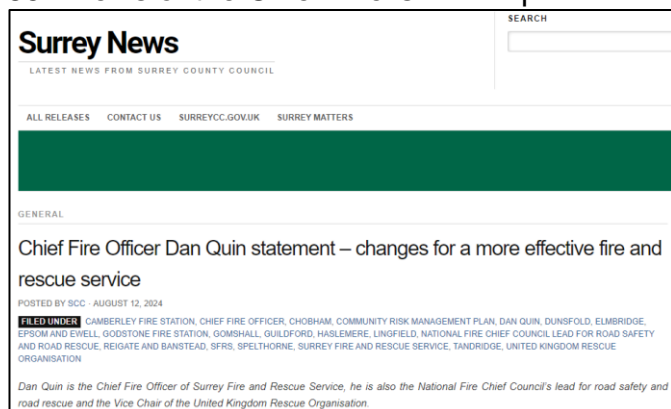
91 mailing list sign-ups.

3 interview requests.

730 animation views via the Surrey Says webpage.

What we heard

Proposal	Strongly Agree	Agree	Neither Agree or Disagree	Disagree	Strongly Disagree
Proposal 1.2 : Specialist Vehicles & Equipment (n=511)	32.3%	33.9%	20.4%	4.7%	8.8%
Proposal 1.3 : Camberley Fire Station (n=511)	14.5%	27.4%	31.9%	7.4%	18.8%
Proposal 2.1 : Response Model Development (n=511)	29.5%	41.1%	18.8%	4.7%	5.9%
Proposal 2.2 : On-Call Weekend Plan Risk Adapted (n=511)	16.0%	27.6%	28.6%	13.9%	13.9%
Proposal 2.3 : Adapt PPR at Haslemere (n=511)	15.3%	31.1%	35.0%	8.8%	9.8%
Proposal 3.1 : Working with Health Partners (n=511)	32.7%	31.9%	19.0%	6.5%	10.0%

■ Strongly Agree   ■ Agree   ■ Neither Agree or Disagree   ■ Disagree   ■ Strongly Disagree

The bar graph (above) shows the proportions of respondents' levels of agreement using a five-point Likert scale. The further to the right the bright blue coloured bar is positioned the more respondents either approve, or are neutral, to that proposal.

8
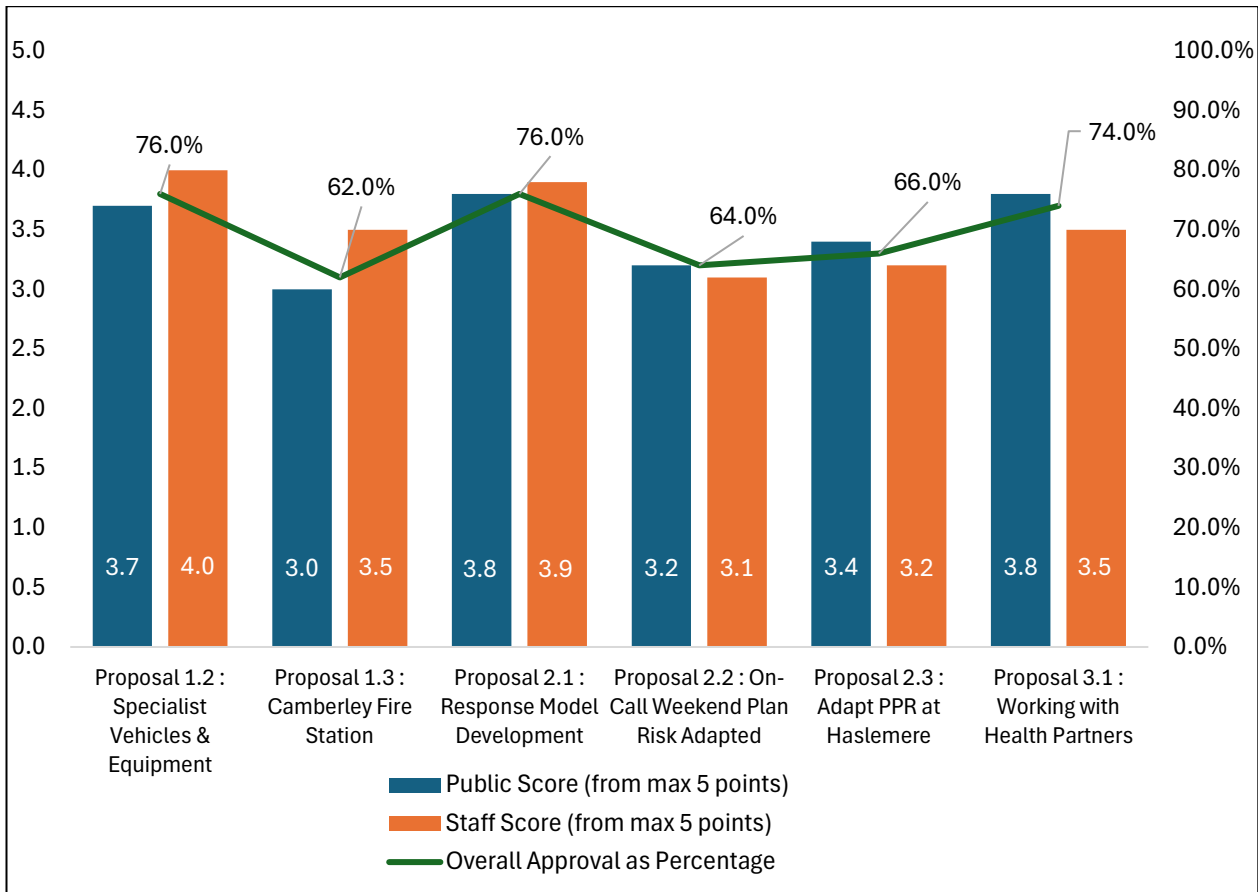
The CRMP Consultation survey's eight fixed-response formatted questions each represent respondents' ratings, or their scores, for the CRMP's different proposals.

All of these questions measure respondents' levels of agreement using a five-point Likert scale ("*Strongly Agree*", "*Agree*", "*Neither Agree Nor Disagree*", "*Disagree*" and "*Strongly Disagree*").

When each Likert scale response is converted into a numerical score (e.g. a numerical score ranging from 1 for '*Strongly Disagree*', 2 for '*Disagree*', 3 for '*Neither agree or disagree*', 4 for '*Agree*' and "5" for '*Strongly Agree*'), and averaged for all respondents' ratings, for that specific proposal, comparisons and an overall impression of proposal approval is possible. This therefore results in the neutral ratings (e.g. 'Neither agree or disagree') becoming a positive rating for the proposal.

The bar graph above compares public and staff average scores (from a maximum of 5.0) alongside an indicator of overall approval, or popularity (obtained by averaging scores for all responses on each proposal and then converting to a percentage).

Proposal 1.1: Banstead Fire Station relocation to Godstone Fire Station

From 424 comments (16,312 words of content), Copilot assisted thematic analysis identified the following themes:

- Response time and safety: This theme encompasses concerns about increased response times and the associated safety risks.
- Alternative solutions: This theme includes suggestions for other locations and solutions to avoid the proposed relocation.
- Community and social impact: This theme captures the perceived importance of the fire station to the community beyond emergency response, here the fire station is seen as a vital part of the community, providing not only emergency services but also community engagement and safety education.
- Transparency and consultation: This recurring theme within the data reflects the demand for more transparency and better public engagement in the decision-making process.
- Operational feasibility: This theme addresses the logistical and operational challenges of the proposed relocation.
- Financial and strategic rationale: This theme includes and covers scepticism about the financial and strategic motivations behind the relocation.
- The lease issue: There were around 50 references to the expired lease covering Banstead Fire Station framed around many questions such as who owned the lease, why couldn't it be extended.

Staff feedback:

- Asked to consider Reigate or Oxted as alternatives.
- Request to extend the lease – explained that it will still end during this CRMP period as the site is being sold and not appropriate for a fire station anymore.

Engagement session feedback:

- Confusion around the Banstead proposal: could the station stay where it is?
- A considerable amount of suggestions that the additional year lease is accepted and more effort to look for land in Whyteleafe is undertaken during this time.
- Some questioning as to whether this was to save money as have seen consultations previously from other services that were based on savings.

9

- Misconceptions of how SFRS responds to incidents, not 'nearest, most appropriate resource' and that crews are not sat on fire stations all day (prevention and protection activity is undertaken).
- Criticism that the Banstead proposal wasn't a standalone consultation.

Proposal 1.2: specialist vehicles and equipment

Approval rating: 76%

Specialist Vehicles & Equipment

- Strongly Agree: 32.2%
- Agree: 34.0%
- Neither Agree Or Disagree: 20.4%
- Disagree: 4.7%
- Strongly Disagree: 8.6%
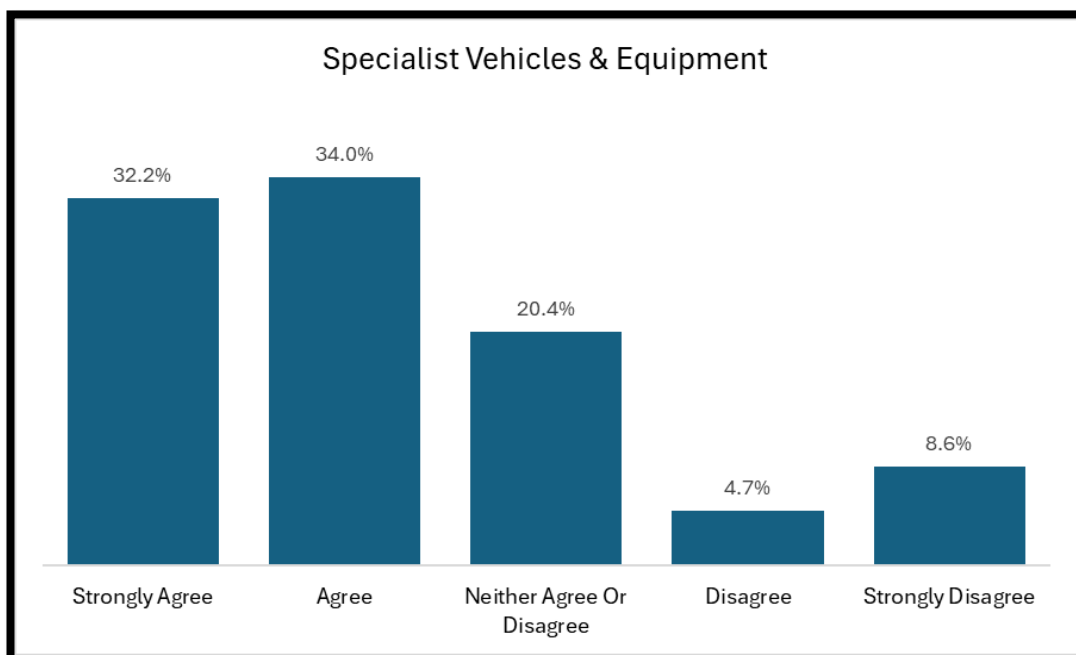
Key feedback:

- **Equipment modernisation:** This theme encompasses comments linked to the necessity for modern and functional equipment to ensure effective firefighting.
- **Response, accessibility and traffic:** This theme covers residents' concerns that relocating services will lead to slower response times, potentially endangering lives, with comments possibly confusing this proposal with the previous (Proposal 1.1: Banstead Fire Station), and an awareness of increasing traffic on Surrey's roads.
- **Specialist equipment placement:** This theme relates to suggestions for placing specialist vehicles and equipment in areas most at risk, such as flood-prone or wildfire-prone regions.
- **Learning and development:** Relates to issues and concerns raised about the cost and practicality of training crews at different stations and the impact on service quality.
- **Evidence-based decision making:** This theme addresses dissatisfaction with the consultation process, alongside an emphasis

11

for making decisions based on data and evidence rather than assumptions or incomplete information.

Proposal 1.3: Camberley Fire Station

Approval rating: 62%
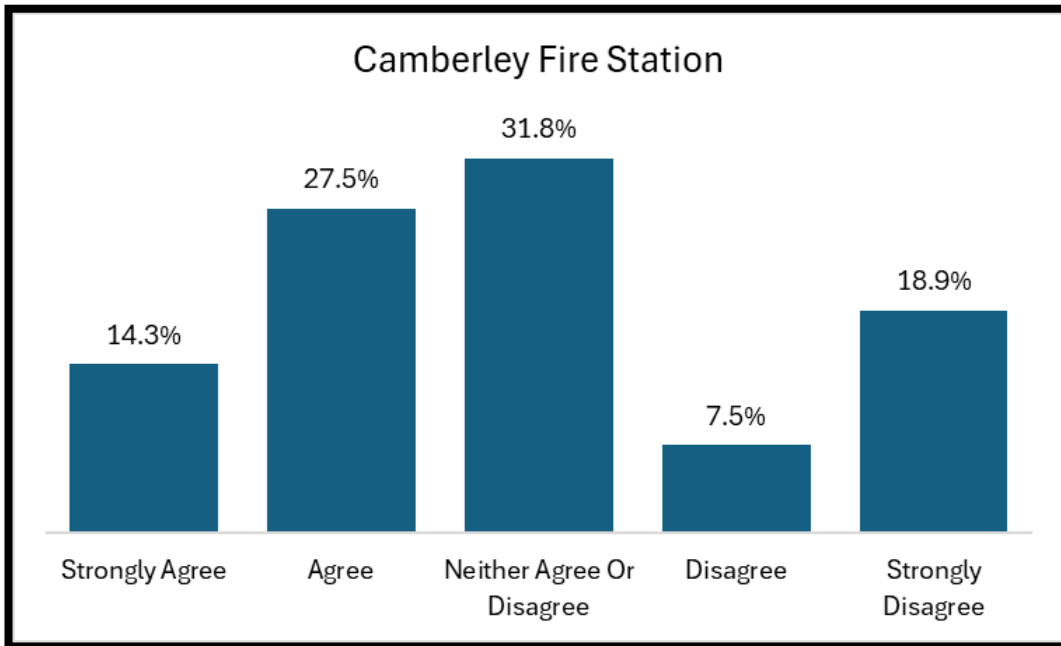
Key feedback:

- **Concerns about response times, particularly during wildfire season:** Theme relates to residents being worried that relocating fire engines will increase response times, especially during emergencies like wildfires.
- **Impact on community safety:** highlighting fears that reducing fire cover will compromise community safety, particularly in areas with extensive woodland and busy roads.
- **Perception of cost-cutting:** Some residents believe the proposed changes are driven by cost-cutting rather than improving service efficiency, potentially putting lives at risk.
- **Support for data-driven decisions:** A portion of the community supports the relocation if it is based on data showing higher risks in other areas, emphasising the need for efficient resource allocation.
- **Suggestions for alternative locations inc. Runnymede (Egham):** Residents propose various alternatives, such as increasing staffing levels, developing partnerships with neighbouring counties, or relocating to other locations.

Proposal 2.1: Seasonal response model

Approval rating: 76%
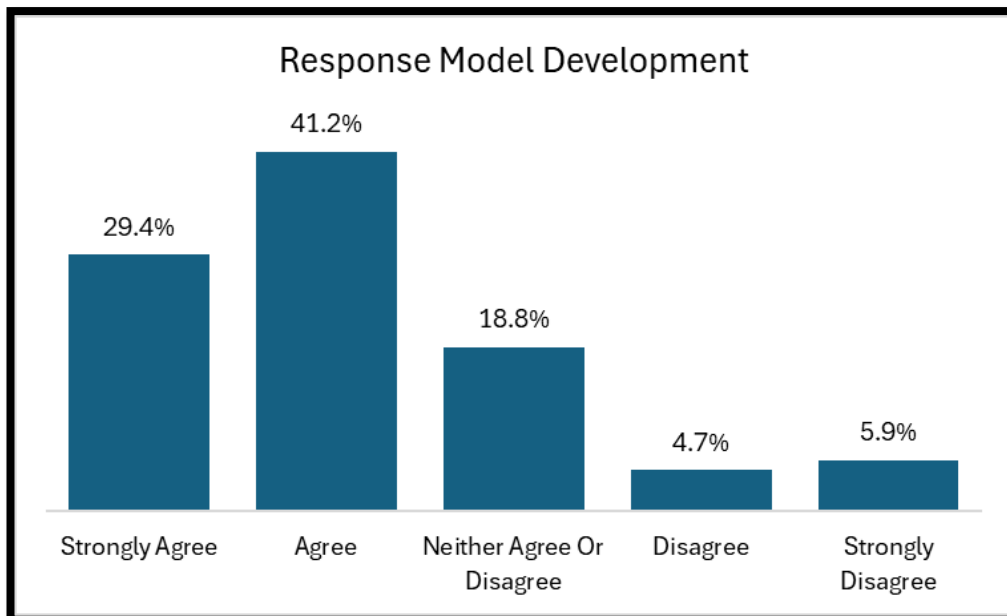
Key feedback:

- **Concerns about resource for this:** There are concerns about whether the proposed changes will lead to a reduction in fire cover and whether resources will be adequately allocated to meet all risks.
- **Perception of cost-cutting measures**: Some residents believe the proposed changes are driven by cost-cutting rather than improving service efficiency, potentially putting lives at risk.
- **Seasonal model fitting environmental factors:** A number of comments relate to how modelling may not meet changing environmental conditions due to climate change and/or would need to be able to accommodation unexpected events such as travel collisions.
- **Lack of understanding around how this works:** An emergent theme relates to residents not fully understanding what a response model is and how it works in reality.

Proposal 2.2: On-Call weekend plan

Approval rating: 64%

13

On-Call Weekend Plan Risk Adapted
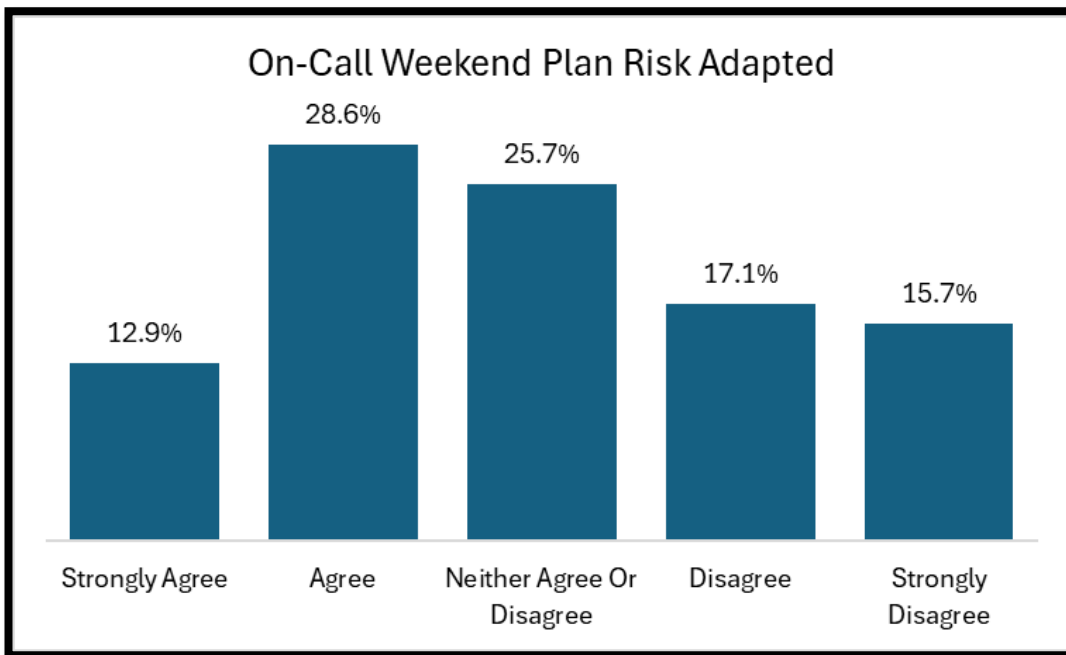
Key feedback:

- **Impact on On-Call firefighter availability for evenings and morale:** Many comments highlight concerns about the availability of on-call firefighters, especially if weekend daytime cover is removed. There is a fear that this change could lead to a loss of firefighters who cannot meet the new requirements, thus affecting morale and retention.
- **Cost being low:** There are mixed opinions on the financial implications of the proposed changes. Some believe that reducing weekend cover could save money, while others argue that it is a cost-cutting measure that compromises safety.
- **Data and evidence-based decision-making:** As with other proposals, this one is generally supported if it is based on accurate data and evidence. However, some comments express distrust in the data provided, questioning its validity and the assumptions made about on-call availability.

Proposal 2.3: Review of Haslemere Fire Station

Approval rating: 66%

Adapt PPR at Haslemere
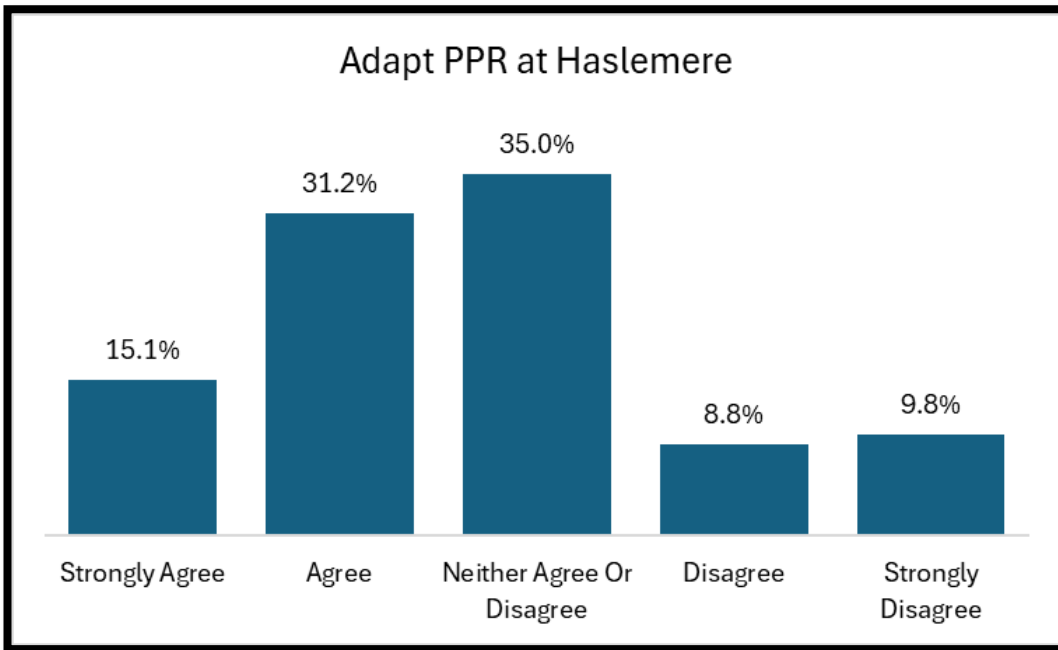
Key feedback:

- **Concerns about response times**: Many residents are worried that changes to staffing or station closures will lead to longer response times, which could be critical in emergencies.
- **Support for maintaining 24/7:** There is a strong belief that full-time, highly trained staff are essential for ensuring safety and effective emergency response.
- **Skepticism around on-call staffing:** Residents express doubts about the reliability and effectiveness of on-call staff compared to full-time crews, fearing it may lead to gaps in coverage.
- **Impact on community safety:** There are concerns that reduced staffing or station closures will negatively impact overall community safety, particularly in remote or high-risk areas.
- **Need for local knowledge and presence:** Residents emphasise the importance of having local fire stations staffed by personnel who are familiar with the area and its specific risks.
- **Suggestions to close cluster of stations and build one in the middle:** a couple of suggestions to close two or three stations within this area and create one in an area such as Milford.

Proposal 3.1: Health partners

Approval rating 74%

Working with Health Partners
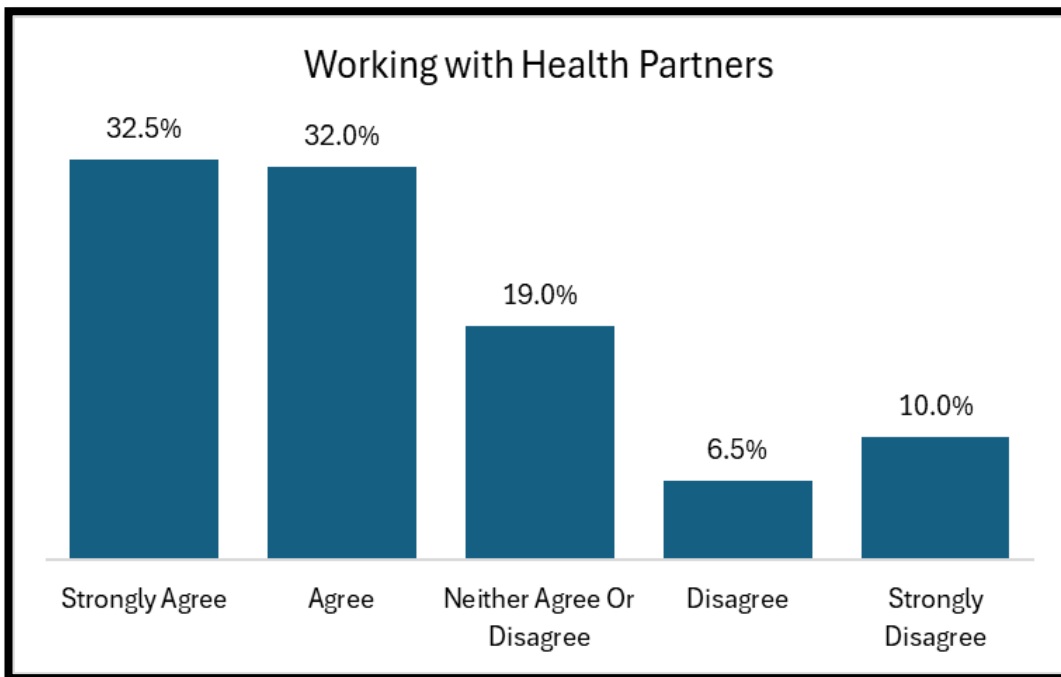
Key feedback:

- **Resource - should be a prevention team responsibility:** Respondents generally support the idea of the fire service working with health partners, but they emphasise that it should not detract from the fire service's primary responsibilities.
- **Training:** There are concerns about the allocation of resources and the need for proper training if firefighters are to take on additional roles in medical emergencies. Residents reported being worried that without adequate training and resources, the fire service might be stretched too thin, affecting their primary duties.
- **Support for vulnerable:** There is support for the fire service's role in assisting vulnerable individuals, particularly in ensuring home safety for those discharged from hospitals. Residents appreciate the fire service's involvement in community safety and support for vulnerable groups, provided it does not impact their main duties.
- **Category A co-responding and welfare:** The comments reflect mixed opinions on the fire service's involvement in medical emergencies, with some supporting co-responding to critical incidents and others expressing concerns about the impact on firefighters' workload and mental health. While some residents see the value in co-responding, others are worried about the additional stress and workload on firefighters.

Recommendations

Recommendation 1:

Prioritise Proposal 1.1 - the proposal with the highest 'visibility' within the public eye concerns the planned closure of Banstead Fire Station with much qualitative data providing a range of critical views, questions, and preferred solutions (e.g. relocation to more proximate locales). "Balance" being an important consideration for this proposal given that the CRMP consultation represents and serves the entire county.

Recommendation 2:

A key concern amongst residents is how transparent and "fact based" the CRMP consultation process will be. This will be relevant to follow-up communication campaigns that inform residents and staff of the engagement efforts that were conducted (e.g. qualitative data contain comments indicating residents' belief that the consultation was run without engaging communities, regardless of the 38+ roadshow events).

Recommendation 3:

Another key concern amongst residents and staff alike is that the CRMP is part of a money saving scheme – simple communications that reassure and inform residents/staff of the financial background is recommended (e.g. if the SFRS budget has not been reduced, share).

Recommendation 4:

Other important factors raised: some respondents raised other issues of concern that are not directly named or mentioned within the proposals themselves such as climate change, unique needs of vulnerable residents and specific areas, and prioritisation of resident and staff well-being. It is advised to discuss these in the final CRMP document.

Alongside the above three recommendations, there are recurring themes across all comments submitted by residents in relation to the proposals. These are less prominent than the themes highlighted in Recommendations 2 and 3, however, they are important because of their content and recurring nature (albeit less so that Recommendations 2 and 3). These recurring themes include (i) concerns over climate change and how the SFRS's proposals can and will accommodate changing weather patterns, increasingly severe weather patterns, and associated risks. (ii) The importance of recognising the unique needs associated with vulnerable community members and their diverse needs (e.g. retired populations with limited mobility), and the unique needs associated with specific areas of the county associated with geographical (e.g. presence of vulnerable heathland and woodland), and transportation (e.g. presence of specific road networks and airport facilities), and cultural factors (e.g. the role that SFRS serves as a member of the community by its presence in both rural and urban locales). And (iii) residents concern that all proposals take into account the well-being of both SFRS staff members (residents expressed a high degree of appreciation and caring for SFRS staff and their work) and residents alike.

9

This page is intentionally left blank

Surrey Fire and Rescue Service: Evaluative review of the community risk management.
Commissioned by Surrey Fire and Rescue Service, completed by Nottingham Trent University.

Rowena Hill

James Hunter

Rich Pickford

Nottingham Trent
University

January

Contents

Contents

Summary of the review process

Surrey Fire and Rescue Service (SFRS) identified a need for an external third party to review their Community Risk Management process and develop a short report outlining key findings. Specifically, they wanted the report to be an accessible, focused review of their processes ahead of public consultation scheduled for 2024. This has been undertaken by Nottingham Trent University with the outputs including this report and a short video explaining a summary of key findings created as part of this project.

Surrey Fire and Rescue Service identified five areas of activity to quality assure and review. These are whether:

1. the data sets used in the process are appropriate and how they have been used.

2. the outputs of community risk profiles are justified from the evidence gathered.

3. the proposed Community Risk Management Plans have been developed using the evidence available, and how these used the datasets and community risk profiles to inform their basis.

4. the planned process of public consultation is appropriate, specifically how the public are engaged, the inclusivity and reach of the proposed plans and how these consultations will include the outputs from the datasets and community risk profiles to inform and scaffold the public feedback of public consultation.

5. the proposals in public consultation met the risks identified through the process shaped by the outputs from the data sets and community risk profiles.

Dr James Hunter completed steps 1 and 2, Professor Rowena Hill completed step 3 and Rich Pickford completed step 4. All three NTU staff members completed step 5 and co-authored this report and the summary video.

The corresponding author for the report is Professor Rowena Hill.

Page 273

9

Datasets and documents included in the review

To undertake this review, we have examined both publicly available documents and SFRS analytical process documents. These have included documents in four broad clusters:

1. Documents relating to the methodology used throughout the process

- Working assumptions of the approach (including principles, strategic aims of the process, and ethical approach).
- The process of staff inclusion in the process (including analysis of staff consultation survey).
- Modelling assumptions undertaken with the data sets and the process by which that modelling was completed.
- Surrey incident data used in the analysis.
- Analysis of the risk context and headlines.
- Datasets included in the analysis of the numerical risk assessment (taken from the Surrey FRS Community Risk Profile 2023):
  - Home Office: detailed analysis of fires attended by FRS England 21/22.
  - 2011 Census.
  - 2021 Census.
  - Mosaic data.
  - SFRS incident data (Vision).
  - SFRS Fire Investigation reports.
  - Institute of Public Care: projecting older people population information.
  - Institute of Public Care: projecting adult needs and service information.
  - Public health data: local tobacco control profiles.
  - Home Office: Fire and rescue incident level dataset England dwelling fires.
  - Office for National Statistics Opinion and Lifestyle Survey.
  - Index of Multiple Deprivation 2019.
  - Experian data.
  - NHS Exeter data.
  - Oxygen data.
  - Home Office: Fire and rescue incident level dataset England dwelling fires.
  - Data Police UK.
  - Department for Transport.
  - Surrey Safer Roads Partnership.
  - Surrey County Council's Road Safety Team.
  - Road Safety Statistics: STATS19.
  - Home Office Fire Statistics data tables.

- ° Statista.
- ° SCC countryside site parking data: Environment, Transportation and Infrastructure.
- ° Environment Agency flood zone maps.
- ° National Water Safety Forum: Water Incident Database.
- ° Companies House.
- ° High-rise premises SFRS data.
- ° High-rise NFCC data.
- ° Historic England.
- ° Department for Energy Security and Net Zero: Renewable Energy Planning Database.
- ° Paul Christensen, Newcastle University data, NFCC.
- ° EV Fire Safe website.
- ° Department for Energy Security and Net Zero: Heat Networks Planning Database: April 2023.
- ° Government National Security and Risk Assessment Register.
- ° The Surrey Local Resilience Forum.
- ° Surrey Local Resilience Forum Community Risk Register.
- ° SCC land planning and development department.
- ° Surrey 2050 Place Ambition.
- ° Surrey Development Forum.

- Surrey Index Model – identifying risks at Surrey County Council level (46 selected indicators to look at priorities aligned to the Community Vision 2030) includes:
  - ° Anti-social behaviour – 20-21 Police UK.
  - ° Claiming out of work Benefits (Benefit combinations includes SDA, CA, PC, CA, UC, JSA, ESA, IB) – August
  - ° Disability benefit (DLA) – August 20 Department for Work and Pensions.
  - ° Households in poverty – 2013/2014 Office for National Statistics.
  - ° Housing Benefit – November 2020 – Department for Work and Pensions.
  - ° Learning Disabilities prevalence – 2017/2018 House of Commons Library – NHS digital.
  - ° Overcrowded housing – Census 2011.
  - ° Pensioner living alone – Census 2011.
  - ° Pensioners in poverty (Pension Credit) – August 20 – Department for Work and Pensions.
  - ° People with mental health issues – August 20 – Department for Work and Pensions (IB).
  - ° Population aged 65+ 2019 – Office for National Statistics.
  - ° Percentage of children in poverty (after housing costs).
  - ° Social rented housing – Census 2011.
  - ° Total crime offences – 20-21 Police UK.
  - ° Unemployment benefit – Department for Work and Pensions.
  - ° Universal Credit.
  - ° Violent crime and sexual offences – 20-21 Police UK.

Page 276

- ◦ Working age benefit claimants (benefit combinations).
  - ◦ Workless through sickness benefit (IB, ESA).
- Met Office UK Climate Projections: climate analysis tool that forms part of the Met Office Hadley

2. Documents relating to the outputs of the community risk profiles

- Mapping of resources over time.
- Geographical plots of specific risks over time.
- Community risk profiles.

3. Documents relating to the development of the community risk management plan proposals

- Modelling of proposed risk management plans.
- Assumptions and principles used to develop the plans from the risk profiles.
- Centre Climate Programme.
- Datasets used in the planning assumptions.
- Temporal and spatial analysis of integrated data.
- Overall summary conclusions of the analysis undertaken.
- Internal presentations outlining decision making regarding the community risk profiles.

4. Documents relating to the development of the community engagement proposals

- Community Risk Management Plan engagement overview.
- Analysis of the community survey (pre-analysis, data gathering, rather than consultation post-profile and plan development).
- SLT meeting minutes related to the CRMP.

Page 277

Evaluation of Surrey Fire and Rescue Service community risk profiling

This part of the review examines the development of the Surrey Fire and Rescue Service (SFRS) Community Risk Profile (CRP) 2023 including the data used, the application of the National Fire Chiefs Council/Operational Research in Health Limited Model (NFCCORH) National Risk Methodology approach, and the analysis undertaken to identify the scale, spatial distribution, and drivers of demands forservice across the county. The narrative presented here is divided into two separate components.

Firstly, a review of the development and appropriateness of the CRP 2023 is provided to determine its' fitness for purpose. The second part of the discussion then sets out several areas for SFRS to consider in relation to aspects of the data employed and the analysis undertaken that might further enhance the evidence base currently provided by the CRP 2023.

Community Risk Profile 2023: Fitness for purpose

The CRP is designed to provide an annual assessment of the calls for service demand that SFRS is likely to face based on the fire, flood, and road traffic collisions risk profile across Surrey as a whole, and within specific localities. The CRP has been developed using two specific approaches to the realisation of a people/places/premises/products risk framework based on: (a) the spatial and temporal analysis of fire, floods, and road traffic collisions data and trends across different time periods; and (b) an analysis of specific potential drivers of calls for demand based on an interrogation of the local risk profile of different localities within Surrey utilising the significant risk factors identified within the NFCCORH national model.

The application of the NFCCORH approach is currently undertaken at a neighbourhood level (lower super output area), but SFRS have indicated that they are exploring the development of a micro-level risk profile at the property level (the NFCCORH Unique Property Reference Number [UPRN] Model).

Our overall view is that the CRP delivers a high-quality evidence base that can be effectively used, both to shape long-term strategic thinking and planning, and to suitably inform operational resource allocation and management to provide an appropriate response to the concentrated fire, flood and road traffic collision risks faced by SFRS within specific parts of their jurisdictional area. More specifically, the CRP is underpinned by the appropriate use of:

- up to date official national and local data sources, alongside the integration of specific bespoke datasets such as the National Risk Register, Surrey Local Resilience Forum Community Risk Register, and the Surrey Index Model to inform the overall understanding of SFRS in terms of scale and dimensions of risk they face across the county. This approach not only enables SFRS to assess the volume and location of the service-specific risks they are required to respond to, but also enables them to see how reducing the fire, flood, and road traffic collisions incidents (and the drivers of these incidents) contributes to the attainment of wider societal outcomes and policy goals embedded within the Community Vision for Surrey in 2030.

- an appropriate robust level of analysis that identifies significant trends and relationships relating to the scale, spatial distribution, temporal patterns of all the relevant types of incidents (and the drivers of these) that make-up the overall calls for service faced by SFRS. This analysis is broken down to consider (a) specific types of demand (e.g. accidental fires, deliberate fires, road traffic collisions, flooding incidents, etc.) and (b) specific types of drivers of call for services (e.g. neighbourhoods with an over-representation of households with greater fire risk characteristics, deprivation levels, age/size/function of premises, road traffic volumes, car parking and tourist hot spots, etc.).

- an analytical perspective that draws on historical incident trends to derive estimates of current risk levels faced by SFRS, whilst seeking to realise a long-term assessment of the

Page 278

changing risk profile of the county. These may arise from changes in the demographic profile of the local population (e.g. through an analysis of immigration levels), increases in the number of households with greater fire risk profiles, meteorological projection around precipitation levels, and new developments in the growth and changing function of specific localities within Surrey that will alter the scale and concentration of call for service faced by SFRS in the future.

Community Risk Profile 2023: Areas for consideration

This component of the CRP review explores additional data sources and types of analysis that SFRS might wish to consider as potential ways for further enhancing their risk profile evidence base. It is important that these suggestions are not seen as criticisms of the current robust risk profile methodology adopted by SFRS. They are merely a series of suggestions designed to bring new insights into the nature of fire risk hotspots and the drivers of fire, flood, and road traffic incidents. Furthermore, the evaluation undertaken by the review team is based on the documentation provided, and conversations with members of SFRS. The CRP 2023 will clearly draw on pieces of data and analysis that do not feature within the final public facing version of this document. It may well therefore be the case that some of the suggestions that appear below have already been implemented by the SFRS analysts in constructing the CRP.

Additional data and data sources

The existing CRP 2023 draws on an appropriate set of official national and local data sources. The datasets employed are the latest available for the respective separate indicators of risk incorporated into the modelling and analysis that informs the construction of the risk profile. There is a clear acknowledgment that the modelling and analysis will have to be re-run to take account of the latest available Census 2021 data at the neighbourhood level since the NFCCOHR, Surrey Local Resilience Forum Community Risk Register, and the Surrey Index Model draw heavily on the decennial Census as a data source. Implicit in the need to update the existing analysis that underpins the CRP is an assumption that the spatial distribution of incidents and drivers will need to be mapped and modelled using the lower super output area (LSOA) boundaries for 2021.

Although in many instances the 2011 and 2021 LSOA boundaries remain the same, there are likely to be several additional statistical neighbourhoods created by the merging of existing 2011 LSOAs, and the creation of new 2021 LSOAs to take account of population changes (as well as the discontinuation of some existing 2011 LSOA neighbourhoods).

Three areas where the SFRS analytical team might consider drawing on additional data sources (and hence expand the existing analytical framework) are:

- Neighbourhood types and area classifications
- Space Syntax
- Points of interest

Neighbourhood types and area classifications

The function of individual neighbourhoods shapes the type of people living within these areas, the economic and social activities that take place, the daily inflow and outflow of individuals, the scale and types of deprivation that are present, and levels of social cohesion and community engagement. There is an extensive literature that has already identified the impact of place-based characteristics (structural [physical environment, buildings], infrastructural [roads, streetscape], neighbourhood stigma [social class, housing type and tenure], public services [quality and cost], environmental [topographical, pollution], proximity to other neighbourhoods and services [transport links], ability to influence local decision-making [political networks and political engagement], support networks [presence of family and social networks], competition for

scarce resources and initiatives, neighbourhood connection and expectations on educational outcomes, unemployment, health and disability, access to housing, and crime victimisation and offending.) These different types of neighbourhood effects compound the advantages or disadvantages experienced by individuals based on their physical and ascribed characteristics, circumstances, and lifestyles. Whilst the application of neighbourhood effects to an analysis of fire risk is at a more fledgling stage (see Beaulieu et al, 2019 for a notable exception), the ideas underpinning this approach clearly have some applicability in understanding the drivers of the spatial distribution of fire, flood and road traffic collision incidents (and certain aspects e.g., physical buildings are already incorporated into the NFCCOHR national model).

Whilst it is possible to use data to measure specific types of potential neighbourhood effect, a composite approach to capturing
neighbourhood function and characteristics can be achieved by using area classifications. These classify different neighbourhoods across the country into a number of different area types based on using multiple socio-economic indicators and cluster analysis to identify localities that are similar to one another. Examples of different types of free open- source area classifications available to SFRS include:

- the ONS area classifications (which are based on socio-economic characteristics and are available at a local authority, lower super output area, and output area level)

- the Spatial Signatures (available at lower super output area and output area level) and Urban Morphology (available at output area) area classifications developed by the Consumer Data Research Centre (CDRC)

These latter classifications take into account the function and built environment of neighbourhoods as well as socio-economic characteristics. An analysis of the spatial concentration of accidental and deliberate fires, flooding, road traffic collisions, and household types that are strongly related to higher levels of risk might:

- reveal some important links between risk and prevalence of different types of incident

- provide a ready-made classification of different types of priority neighbourhoods that can be used in planning and resourcing responses to calls for service

Space Syntax

Within the existing CRP 2023, there are elements of analysis which seek to explore, for example, the impact of traffic flows on the prevalence of road traffic collisions, or the number of visits to certain locations and the spatial distribution of wildfire hot spots. More generally, different levels of pedestrian and traffic movement that create (or reduce) the opportunity structures that shape the likelihood of fire incidents or road traffic collisions – as well as the presence or absence of social guardianship that might create the potential for perpetrators to desist from engaging in arson – may be a potential useful additional piece of analysis to undertake in order to explore the drivers of calls for service. One approach to measuring pedestrian and traffic movement at the street level is Space Syntax, which is based on analysing the connectivity levels of each specific street segment to other parts of the road network. This methodology enables the identification of 'hot' and 'cold' street segments, and was developed by researchers at UCL who have now provided free access to the Space Syntax pedestrian and traffic movement scores for streets segments across the United Kingdom.

Points of Interest

The opportunity structures that shape the risk of fire incidents are likely to reflect a combination of risky facilities, risky places, and population movement. The scale of the latter is likely to be influenced by the presence of specific facilities and spaces that either attract or repel people from specific locations. The Ordnance Survey's Points of Interest data set enables the user to access the geocoded location of every type of facility (e.g. bars, pubs, restaurants, fast food outlets, schools, hospitals, transport hubs, etc.) and space (e.g. sports grounds, parks, open green spaces,

cemeteries, etc.) within every local authority area. This POI data has already been employed to measure the impact of crime generators (which attract potential victims) and crime attractors (which attract potential offenders) on the spatial concentration of crime hot spots within specific street segments and neighbourhoods. Using this data to undertake an analysis of spatial patterns of deliberate fires may provide additional clues as to the presence or absence of risky facilities and places within certain neighbourhoods both in relation to the identification of the drivers of greater levels of fire risk, as well as the means of identifying which neighbourhoods and communities would benefit from targeted fire risk and prevention advice and initiatives.

Using additional denominators

Throughout the CRP, population and property denominators have been employed to transform the raw data into, for example, rates of fire incidents per 10,000 population to control for the different number of individuals living within different localities across Surrey. This is an appropriate strategy where the incident (or driver of these incidents) has a clear 'population' connection and individuals or households is the appropriate denominator to employ. There are a number of elements included within the analysis presented in the CRP, where the deployment of an alternative denominator might prove beneficial. For example, in the analysis of the spatial distribution of road traffic collisions across the county, transforming the raw data into the number of these type of incidents per street segment, or specific types of street segment, might reveal a slightly different geographical distribution of this problem. For example, the analysis of road traffic collision hot spots clearly identifies the prevalence of the main hot spots within the northern part of the county.

This, however, is an 'expected' finding given the proliferation of major highways within this part of Surrey as opposed to further south in the county. Expressing road traffic collisions per number of vehicles using specific highways or roads, or per traffic journeys being made on each route, might serve to highlight locations where the volume of traffic may not be the sole driver of greater number of road traffic collisions. The creation of this type of measure may also aid the identification of locations where specific roads are generating an over-represented number of road traffic collisions relative to the volume of traffic using these routes (and hence the requirement for traffic management or speed restriction initiatives which are not solely focused on high traffic volumes).

Alternatively, using location quotients as a form of measure that identifies the relative share of total road traffic collisions across Surrey found on each street segment relative to the share of total vehicle journeys made within Surrey on the same street segment, may aid the identification of alternative types of risky roads that is not driven simply by the volume to traffic. Roads (or road segments) with a location quotient score greater than one would indicate that the number of road traffic collisions is over-represented relative to the number of vehicle journeys being made. This would identify parts of the road network which might merit some form of intervention which would not form a priority area for action if the road traffic collision hot spots are being simply defined based on the volume (rather than the over- or under-representation) of incidents.

In a similar fashion, the analysis of the spatial distribution of wildfire incidents that appears later on within the CRP correctly explores the relationship between their prevalence and the number of tourists, or the availability of car parks (which act as a tourist generator).

Analysing the spatial distribution of wildfire hot spots based on the number of incidents per 1000 tourists or vehicles using a specific car park may add an additional level of insight into the locations generating higher levels of call for service.

Implementation of the NFCCOHR national model to create the Surrey-level risk profile

As we would expect, the development of a Surrey-level fire, floods and road traffic collisions risk model, and the specific drivers of risk within the county, draws heavily on the NFCCOHR national risk model. This model represents the currently definitive holistic analysis of the drivers of risk and was commissioned specifically by the NFCC to provide a

good benchmark comparator model that could be employed by
individual FRS to generate local versions of the national risk model across neighbourhoods or properties within their jurisdiction.

There are two considerations with the adoption of the NFCCOHR model to identify the scale and location of fire risk across Surrey that should be noted:
risk factors may not universally apply in the Surrey context (i.e. factors which shape the spatial distribution of fire incidents at an all-England level because they encompass every different type of locality found across the country do not constitute an important factor within Surrey
the relative importance of these national level risk factors may not reflect the weighting that should be attached to specific risk factors based on a Surrey-level form of modelling and analysis (i.e. households containing members aged 65 plus may not shape the level of accidental fire risk within a specific local context to the same degree as they do nationally).

The first of these issues is partially acknowledged already within the CRP by the commentary that identifies that the risk factors identified within the NFCCOHR model are heavily driven by different aspects of deprivation levels – and that deprivation levels are in reality much lower within many areas of Surrey. This appears to raise the idea that the Surrey version of the NFCCOHR model may over-emphasise the importance of deprivation as a risk factor. If the number of accidental or deliberate fire incidents is lower within Surrey compared to other FRS areas, then this may well be explained by the relative greater levels of affluence within many parts of the county. However, it is possible that if the number of fire incidents is not significantly lower in the Surrey FRS area, then the absence of high levels of deprivation may point to a different set of factors that are shaping the scale or spatial concentration of fire incidents.

Secondly, there may be factors which are unique to Surrey which are not included in the NFCCOHR methodological approach because these factors are not present within a sufficient number of neighbourhoods and properties within other FRS areas across England – but which might be important factors that need to be included within the Surrey version of the national model. Running a Surrey only level analysis of the spatial distribution of fire incidents may not only identify a different set of risk factors but may also expose findings that suggest that the relative weightings attached to specific risk factors based on the national model may over- or under-emphasise the relative importance of these same risk factors at the local level across the different neighbourhoods that make up the county. Surrey FRS should therefore undertake a Surrey version of the analysis to enable a check of the relevance and applicability of the risk findings and weightings identified within the national model to determine the degree of congruence between the national and Surrey-only sets of findings.

Drivers of fire, flood, and road traffic collision incidents

The analysis of risk presented with the CRP appropriately draws heavily on the risk factors identified within the NFCCOHR national model. There are, however, a couple of areas where the analysis presented within the CRP requires some clarification, or the adoption of a slightly different approach. Firstly, the CRP correctly explores future calls for service scenarios by examining the impact of population change arising from immigration levels. It is possible, however, that changes in the level of risk might also be shaped by natural population changes, and internal migration from within and beyond Surrey. The current focus on immigration is relevant in the context of additional demands being faced by SFRS in relation to
community engagement, language barriers, and other related issues.

The narrative here, however, also appears to imply (but does not demonstrate with the provision of any evidence) that the scale of fire risk will increase as a result of immigration because of the presence of greater numbers of households with fire risk characteristics amongst certain ethnic minority groups compared with the indigenous population. It would be useful to: present some evidence on the distribution of these types of at- risk households across different ethnic groups, and to identify that immigration is primarily drawing new arrivals into the county from these same ethnic groups, in order to justify the focus on immigration; and break down and reframe the analysis

Page 282

around population turnover that includes natural population change and internal migration, rather than simply immigration to enrich and strength the evidence-base around this specific factor.

In exploring the geographical pattern of deliberate fires in Surrey, the relationship between these types of incident and street crime levels have been analysed within the CRP. In this context, it may be worth considering that the location of crime hot spots varies by different offence types (i.e. high crime areas do not necessarily contain high levels of each type of crime) – and therefore focusing on a specific crime type might be more appropriate than focusing on the overall level of crime.

Furthermore, and to strengthen this argument, an examination of the offender population would quickly reveal that most offenders appear within the criminal justice system for one or two rather than multiple offence types. Burglars may also be shop theft offenders, but they are not the same cohort of offenders that commit violent or sexual offences. By way of example within a fire context and building on data in the version of the CRP shared with the review team, further analysis of the distinctive characteristics of arson offenders and identifying the concentration of individuals with these specific profiles within neighbourhoods may be a more effective way of predicting potential arson hot spots (alongside the use of arson incidents) than simply utilising the volume of total crime incidents at the street level.

Types of analysis undertaken

The final issue explored within this component of the CRP review concerns the type of analysis undertaken and presented within the Surrey risk profile. The discussion presented here focuses on both the type of hot spot analysis undertaken, and the identification of specific factors that shape the risk profile of specific localities across the county.

Identifying alternative types of risk/incident hot spots

Much of the analysis presented in the CRP focuses on the identification of hot spots based on an analysis of the concentration of the volume of incidents. There is a clear operational rationale, alongside meeting public expectations concerning the disproportionate allocation of resources within certain parts of the county, for concentrating on the volume of incidents across neighbourhoods. The discussion above has, however, already suggested the need to consider identifying hot spots in areas where there is an over-representation of types of incidents e.g., road traffic collisions to identify potential priority areas when the yardstick being employed is based on volume of incidents.

A third approach to hot spot mapping involves the identification of neighbourhoods which 'buck the trend' in terms of the levels of incidents occurring within them relative to the number of incidents taking place within immediately surrounding localities. This builds on the idea of Tobler's first law of geography that promulgates the observation that localities which are closer to one another are more similar than localities that are farther apart. This would lead us to expect neighbouring localities to have similar fire risk and fire incident profiles to the areas immediately around them. Undertaking a Moran's I spatial autocorrelation analysis enables the identification of neighbourhoods whose profile either matches or does not match that of their neighbours - and thus confirms or refutes our expectations.

Neighbourhoods with high risk/incident profiles surrounded by neighbourhoods with equally high risk/incident profiles – or neighbourhoods with low risk/incident profiles surrounded by neighbourhoods with equally low risk/incident profiles would confirm our expectations. However, this type of analysis will also reveal neighbourhoods whose profile bucks the prevailing trend within the localities which they border. This can be in terms of the number of fire incidents being much smaller than in surrounding areas (raising the question, what is it about this locality that is suppressing the expected number of fire incidents?) – or situations in which the number of fire incidents being higher than surrounding neighbourhoods (raising the question, what are the opportunity structures within this
neighbourhood that are resulting in a greater number of fire incidents than expected?).

Page 283

Identifying the spatial concentration of fire incidents

The current focus on the identification and analysis of fire incident (and risk) hot spots within the CRP directly identifies the presence of hot spots within certain areas of the county. The CRP, however, does not appear to undertake any evaluation of how concentrated these hot spots are, and whether the scale of concentration and the location of hot spots changes over time. Within the analysis of crime hot spots, studies evaluating the law of crime concentration have consistently identified that between 2-6 per cent of street segments, or neighbourhoods, account for around fifty per cent of crime incidents – and that this scale of concentration remains consistent over time in terms of both scale and location. Identifying the spatial concentration of fire incident hot spots would therefore raise a similar possibility for the optimal deployment of limited resources within a small proportion of locations. By comparing the share of fire incidents in each street segment (or neighbourhood) with the share of total street segments (or neighbourhoods) that each represents, it is possible to arrive at a single quantitative indicator (in the form of a Gini Coefficient score) that captures whether fire incidents are evenly distributed (a Gini Coefficient score closer to zero) or concentrated within a few locations (a Gini Coefficient score closer to one). An explanation of the law of crime concentration, and how to undertake a Gini Coefficient based analysis of the spatial concentration of crime incidents is provided by <u>Bernasco and Steenbeek (2016)</u>. The methodology outlined here could easily be applied to the spatial concentration of fire incidents.

9

A baseline approach to identifying specific risk characteristics

The NFCCOHR national model enables the user to identify specific risk factors that increase the potential for fire, flooding, or road traffic collision incidents to concentrate within certain localities. A complimentary approach to use that could identify those localities that might require a greater level of resources being devoted to higher levels of call for service is to employ a baseline model. This would involve initially identifying either the population or neighbourhood characteristics of those households or areas that experience no, or the fewest, number of incidents. These household or neighbourhood types can then be used as a baseline against. This would identify the types of households or areas that experience much higher numbers of incidents relative to the baseline group. This enables the identification of the relative prevalence of incidents across different household and neighbourhood types, and hence the concentration of fire risk and incidents within specific population groups or neighbourhoods. This type of analysis might provide additional insights in situations where the incident trends are increasing or decreasing and requires the need to explore whether this increase or decrease is uniformly distributed across all household or neighbourhood types. If it can be identified that specific households or neighbourhoods are the location for the greater concentration of incidents (whilst the overall trend for incidents is downwards), then this creates the potential for a limited pool of resources and initiatives to be concentrated in locations where they are most needed.

Testing the usefulness of the Surrey version of the national NFCCOHR model

The CRP identifies both risk and incident hot spots across the county within the CRP. To develop this further, giving consideration to theneed to undertake analysis which compares the predicted fire hot spots against the subsequent actual location of fire incidents

a) to test the validity of the Surrey CRP; and

b) as a risk understanding/fire reduction learning mechanism where the number of actual fires is greater or lower than predicted – and the questions this raises about why the gap between predicted and actual fire levels exist, could offer further understanding.

Although the methodological approach employed to generate the NFCCOHR uses real incident and location data to train the model to secure the best explanatory fit that can identify the significant risk factors, from a fire reduction or resource allocation perspective, the efficacy of the local Surrey risk model in accurately predicting the location and drivers of risk needs to be regularly tested. This enables not only the suitability of this model as the basis for shaping strategic thinking and operational deployment of resources but can also act as a mechanism for identifying the emergence of underlying changes in the functional profile of specific neighbourhoods across

Surrey. This could result in an increasing gap between the predicted and actual location of fire, flooding, and road traffic collision incidents.

Page 285

Community Risk Management Plans

Given that we have accepted that the datasets, the assumptions with which they were treated with, and the profiles generated from the datasets are a sound approach, the next step is to review how these have informed the development of the risk management plans. This shall now be considered.

9

Given that the multiple stages of information aggregation and data analysis is generated and integrated across a number of datasets and sources, the challenge frequently becomes how to track and include the information without loss of nuance and granularity of meaning when producing the profiles. Having reviewed the process through the stages of development, there is no evidence of information loss between the stages of the process. The analysis at each stage has clear audit trails from the assumption/findings, back to the source information. Where findings have been synthesised or aggregated together, this has been completed in a rational, logical and coherent manner following typical conventions and methods to do so with transparency. This is to be commended.

As described in the sections above in this report, the review of the data used, the analysis of that data, the integration of the findings, and subsequent profiles, are robustly evidenced and have been completed according to conventional methods and well recognised approaches. The NFCC approach has been included within the wider Surrey approach, which is an important step to establish national consistency and sector learning. We commend the way in which the datasets have been used to establish the profiles, the way in which the aims have been used to create a shared, consistent, transparent and explicit decision making and policy application approach, and, the inclusion of the NFCC approach.

Organisational wide, core work within public services needs to be inclusive, transparent and accessible to the staff, the public, and those to who the service is accountable to. It is quite rare in these processes to be able to access so clearly the strategic aims and ambitions that the process is designed to achieve within the context of Surrey, not only at the initial stage, but also clearly shaping the work throughout. Through the process it was clear these strategic aims were active and used to shape and refine the content. The aims were clearly defined, specific to the organisation, and referenced the wider county objectives, and were also contained, referenced and embedded explicitly and consistently throughout the process. This is to be commended.

Throughout the documents, process and public facing documents, there is reference to the strategic aims, but also the wider application to the work, responsibilities and partnerships with, and collective efforts of, other local public service strategic priorities (e.g. council) and other risk workings (e.g. LRF work). This means residents should be assured that the profiles sit complimentary to the Surrey public service and partners context. This also ensures that the strategic objectives of partners, and what the partnership working means for the public of Surrey is contained within the Surrey FRS approach. The explicit comparison and integration of these wider contexts within this process demonstrates that the team are working in a principled and ethical way, not just delineating the process in the areas of their statutory obligations, but by considering how public needs can be recognised by the Surrey CRP process. We commend this approach.

Page 286

Lastly, we would like to reiterate that the suggestions in the section above are simply made to further develop or enhance the already strong approach taken by Surrey FRS. The approach undertaken is to be commended and we see no issues with this full and comprehensive approach of developing data to risk profiles.

9

Planned process of public consultation

Due to the planned consultation process for the Community Risk Profile falling outside of the widow this review period undertaken by NTU we have been unable to review the consultation process. Despite this we have engaged with staff designing the process and discussed their developing approach which is being developed alongside the Consultation Institute to gain certification on leading practice for designing and delivering consultations with stakeholders. We did not see evidence of this certification as the application process was underway during the review but are assured by the plan to undertake certification through a formal process as long as learning is embedded and shared across the service for key stakeholders.

We note that the consultation on the CRMP is due to run for 12 weeks across Surrey in May dependant on local and national election purdah timelines which are being planned for with a primary and secondary consultation period being considered. At the time of writing this report, a timeline and key stakeholder list was in development that was focused on creating a flexible and organic system to draw a broad and deep response from those the Community Risk Profile would impact on. The review team feels this is an appropriate and robust process.

Community Survey Review

In preparation for the review the team were able to access the Surrey Fire and Rescue Community Survey Full Report which was published in April 2023 that was used to inform the development of the CRMP and to gain an early insight into what really matters to residents and the risks that residents can identify in their area. The report is clear and articulates a valuable approach to seek feedback from residents. Whilst the response rate was not high. 0.08% of residents, based on current census population data, provided a broad and evenly distributed return from residents across Surrey. We noted that social media had been used to engage diverse groups online but did not see any specific focus on groups Surrey Fire and Rescue may consider as more prone to require their services. We would also recommend consideration of groups that are often described as hard to engage either due to language, health access or distrust with formal organisations beyond the focus on younger people. The review team noted that if resources had allowed a wider dissemination strategy across online platforms, local radio and television may also have boosted the response rate. It was noted in the survey report that accessibility had been considered with the use of an easy reader system. We would also hope that future consultations use this system and consider the option for translations of the survey to be available to residents who would prefer to share feedback in a language that is not English.

Within the report the review team also noted that some questions shared in the report such as *How confident are you in Surrey FRSs ability to deliver response work?* were weighted with more positive response options and without a neither agree or disagree option available to residents. We recognise advice was sought by an internal team when constructing the questionnaire and in the future we would suggest the use of a more balanced response options to this type of question set for the consultation to enhance confidence in the results.

We also noted that the report contained no conclusions or recommendations within it. This reduced our ability to review lessons and next steps for how this survey would impact on the

development of the CRMP. The separation of actions and findings is often deliberate to allow decision makers to use findings to formulate actions within a linked process as we have noted through minutes of meetings.

Community Engagement Conclusions

Despite the timetable restricting the review team's ability to formally review documentation of the process for consultation it appears that robust and structured plans are in place to undertake the consultation for the CRMP by Surrey FRS. Our review of meeting minutes and the community survey from 2023 highlights a clear process and stakeholder buy-in for these key aspects of the CRMP. We hope the suggested areas to consider from the community survey can be considered for the public consultation when it is made live in 2024.

9

Page 289

Page 290

Review conclusions

9

The review team believes that Surrey FRS has undertaken a robust process to develop the CRMP for Surrey following our engagement with staff and our review of shared documentation. A selection of suggestions has been shared across each aspect of the review process which the team may wish to reflect on as they move forward in future iterations, but we are assured that the process undertaken has not only reflected the requirements of the CRP but also goes further to ensure it fits within the wider strategic objectives of Surrey FRS and partners for Surrey.

The fact Surrey FRS have undertaken to quality assure this process should be commended as it reiterates their attempts to be inclusive, transparent and accessible to the staff, the public, and those to who the service is accountable to as a service.

We hope the CRP is a valuable tool for Surrey FRS now and in the future as it continues to mitigate and tackle risks and incidents for the people and organisations of Surrey.

Page 290

About the authors

Professor Rowena Hill

Rowena Hill is Professor of Resilience, Emergencies and Disaster Science with over 20 years researching alongside the UK emergency and resilience structures. Her research focus is on collective resilience, wellbeing and risk. She has successfully delivered previous projects with the NFCC such as the national risk methodologies work, wellbeing national project, projects supporting transition into retirement, and projects exploring death by suicide in the fire and rescue service. She has also worked with and NPCC, namely as the embedded scientist of the C19 National Foresight Group for the Civil Contingencies portfolio and the embedded scientist for the Climate Change portfolio. She is the chair of the National Fire Chiefs Council Academic Collaboration, Evaluation and Research Group, sat on the NFCC Definition of Risk Board, the Health and Wellbeing Board, the Academic Reference Group for HMICFRS, and is the National Honorary Research Lead for the Fire Fighters Charity. She recently undertook a part time secondment to the Department of Levelling Up Housing and Communities.

Dr James Hunter

James Hunter leads the Quantitative and Spatial Criminology Research Group, is Co-Director of the Work, Informalisation, and Place Research Centre and a member of the Centre for Offending, Prevention and Engagement (COPE). James's research interests concern understanding crime victimisation risk and inequalities and how we can use this knowledge to shape crime reduction interventions. He recently completed a project examining whether visible burglar alarms increase victimisation risk which was commissioned by the Home Office. He also designed the predicted burglary neighbourhood maps that underpinned the Home Office's Safer Street Fund. The National Crime Agency used his predictive analysis to identify which hand car washes to target in a crackdown on labour exploitation, human trafficking and modern slavery as part of Operation Aidant last year. He has previously worked on the development of a Mapping Health Toolkit for the Chartered Institute for Environmental Health, which is designed to help local councils in England contribute to Joint Strategic Needs Assessments and develop public health profiles for their localities. Other recent work includes the development of the Community Engagement Area Classification (CEAC) (funded by the Home Office/College of Policing) that classifies neighbourhoods into different community engagement 'rich' and 'poor' localities to enable police forces and officers to target their community engagement initiatives more effectively. He has also built a data and decision-making resource for Essex Community Safety Partnerships to reduce instances of Violence Against Women and Girls (project MINERVA). This project has established new knowledge and policy learning with Essex colleagues on where VAWG takes place, the differences in hot spot and fear of crime locations, and the factors shaping the different streets where male and female VAWG incidents occur.

Rich Pickford

Rich is the manager of Nottingham Civic Exchange, the universities Think Tank located in the School of Social Science. The Civic Exchange facilitates the translation and exchange of academic knowledge and expertise for local, regional and national partners helping to be a civic neighbour to Nottingham communities and influence national policy. Rich also works to understand and tackle labour exploitation having led work with the National Crime Agency to utilise data and insights from our research through Operation Aidant in 2022 and through work with external partners to

understand licensing and multi-agency approaches to modern slavery. He has worked on the NFCC Health and Wellbeing project, the Fire Fighters Charity projects and also the MINERVA project to explore VAWG with Safer Essex and Essex police. Alongside NTU's Vice Chancellor he has undertaken research on higher level skills development and is engaged in debates on good work and the economic future of the region. Through the Covid-19 pandemic he worked alongside the C19 National Foresight Group with Professor Hill and also conducted an evaluation of the National Emergencies Trust's first activation. He also runs our Civic Exchange external community relationships for the university and ensures we have a voice and give voice to the communities of Nottingham in local and national policy spaces.

9

9

Corresponding Author: Professor Rowena Hill

This page is intentionally left blank

People Impact Assessment (PIA) Template

Overview of PIA	
1. Policy / Project / Function:	Community Risk Management Plan (CRMP)
2. Date of PIA:	April 2024

3. What is the change that is being proposed? (project, policy, function, service)

All Fire and Rescue Services have a statutory duty to produce a Community Risk Management Plan (CRMP).

In Surrey, we are currently developing the CRMP. Through analysing data and receiving feedback, we have identified the key risks we face in Surrey and what people are most concerned about through a community and staff survey carried out last year. This information has been brought together to show how we will respond to risk and protect people from harm in Surrey. The detail of how we will do this will be set out in our CRMP 2025 – 2030.

Our CRMP will include the following:

Our five strategic aims and supporting commitments:

1. Support communities to be safe, thriving and resilient through prevention and protection activities.
   - Focus on prevention and protection activities.
   - Work with partner agencies to ensure we are focused on people, helping vulnerable residents get extra help when it's needed.
   - Prioritise the highest-risk buildings for fire safety inspections.

2. Be a great place to work, and our people feel valued, supported and highly trained.
   - Create a fully inclusive culture that prides itself on making a difference to our residents.
   - Prioritise the health and wellbeing of our staff. Build upon the National Fire Service Core Code of Ethics and continue to embed them as our values.
   - Provide opportunities for all to develop through learning and development.

3. Build an inclusive workplace, act with integrity and challenge prejudice.
   - Create an inclusive workplace where all feel respected and that they belong.
   - Build a workforce that is truly reflective of the communities we serve.
   - Highlight the importance of equality, diversity and inclusion, with no form of bullying and discrimination tolerated.

4. Respond to emergencies swiftly, with a highly professional and agile workforce, focused on saving life and reducing harm.
   - We will work with staff to align working patterns to meet the risk and incident demand of our county, without impacting our offer to communities.

Page 1 of 106

- Use data and intelligence to inform our decision making and lessen risks before they escalate.
- Give education and advice as part of our prevention and protection activities, and when responding to emergencies.
- Provide our staff with the right information and equipment to keep them safe when responding to emergencies.
- We will ensure we have a modern, efficient and effective on-call response, encouraging future participation in the fire and rescue service.

5. Make best use of our resources and deliver a service that provides value for money.
   - Embrace our environmental responsibilities.
   - We will ensure our fire engines and equipment are fit for purpose, sustainable and support our environmental responsibilities.
   - Ensure that our workplaces are appropriate and fit for the future.
   - Embrace technology and data to enable improved, intelligence-led outcomes.

Our proposals for change within the plan are:

1. Relocate the current Banstead fire engine and crew to Godstone Fire Station in 2026, following an updated and extensive review of any options within the Whyteleafe area. Review the capability and locations of our specialist vehicles and equipment so our resources are aligned to current and future risks.
2. Review current resources at Camberley Fire Station and consider relocation options within the boroughs of Spelthorne, Elmbridge and Runnymede. We will develop a response model which responds to fluctuating risk and seasonal demand.
3. We have reviewed the weekend availability of our On-Call staff and its impact on risk within the CRP (Community Risk Profile) therefore we will match our resource availability to risk.
4. Review existing prevention, protection, and response arrangements in Haslemere to ensure the most appropriate allocation of resources.
5. A further review of our On-call availability to ensure an appropriate level of provision throughout the week.
6. We will implement 12-hour shifts on the current 2-2-4 rota pattern to align to risk and demand to increase capacity for prevention and protection activities.
7. Working with our health partners to respond to those who are most vulnerable in Surrey.

4. Analysis Rating:	(*The analysis rating is identified after the analysis has been completed – See Completion Notes*).		
RED	**AMBER**	**GREEN**	**Proportionate means achieving a legitimate aim/can be objectively justified.**
	X		

People Impact Assessment (PIA) Template

4.1. Analysis Rating explanation (Explain the reasons for your rating).

PIA demonstrates unintentional risk of discrimination against several protected characteristics. Recommended actions to mitigate the possibility of these risks are listed in Action Planning section.

---

5. Please list methods used to analyse impact on people (e.g. consultation forums, meetings, data collection).

- Community Risk Profile (CRP)
- Statement of Assurance
- Surrey Community Risk Register
- National Risk Register
- Community Engagement Survey
- Staff Engagement Survey
- Staff Engagement
- Formal consultation to be held May – September (with a brief pause in the middle due to the General Election) and overview of feedback will be included. Totalled three months consultation.

---

6. Please list any other policies that are related to or referred to as part of this analysis.

- Fire and Rescue National Framework for England

---

7. Please list the groups of people potentially affected by this proposal. (e.g. applicants, employees, customers, service users, members of the public).

- People living, working and travelling through Surrey
- SFRS staff
- Emergency Blue Light Partners
- Health Service
- Neighbouring Fire and Rescue Services
- Partner organisations

---

8. Does any Equality Data exist regarding the use or implementation of this proposal (policy, project, or function, service)? Please indicate by selecting the appropriate option (refer to Completion notes for further details). If the answer is yes, kindly provide the data within the corresponding section for protected characteristic evidence.

Yes: X   **No:**

9

People Impact Assessment (PIA) Template

List any Consultation e.g. with employees, service users, Unions or members of the public that has taken place in the development or implementation of this proposal (project, policy, function)?
Engagement has been carried out with: • Trade Unions • SFRS Staff • People living, working and travelling through Surrey • Communication has also been sent to partners, including neighbouring fire and rescue services and other blue light organisations in Surrey. Consultation was carried out for the statutory three months ending in September 2024. This PIA was updated following the consultation, analysis, understanding of responses and decision making by SFRS.

9

Financial Analysis if applicable, state any relevant cost implications (e.g. expenses, returns or savings) as a direct result of the implantation of this policy, project, or function.
Costs (£) None
Projected Returns (£) None
Implementation (£) None
Projected Savings (£) None

People Impact Assessment (PIA) Template

Assessment

9

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
Sex (Men and Women)				Short narrative of dat*a* *The 2021 census shows Surrey has a sex breakdown of 51.2% female and 49.8% male. This proportion difference in sex is most pronounced in Tandridge (51.8% female) followed by Runnymede and Elmbridge (51.7%). It is least noticeable, although still present in Woking (50.3% female), followed by Guildford and Spelthorne (50.8%). In the CRP we see little evidence linking sex to risk of/from fire (or other risk covered by the CRMP), the only relationship is identified by the Home Office around fire related fatality in older men. The risk here is for men over 65 being up to 1.7 times more likely to die in a fire than women in the same age bracket. This increase may be related to factors, which may have a key role in the ratio above, other than sex.*
	X			**1. Relocate the current Banstead fire engine and crew to Godstone Fire Station in 2026, following an updated and extensive review of any options within the Whyteleafe area.** In the CRP we see little evidence linking sex to risk of/from fire (or other risk covered by the CRMP), the only relationship is identified by the Home Office around fire related fatality in older men. The CRP gives evidence that age is a key factor in fire risk, 65 and over is a fire vulnerability factor. Men over the age of 65 are up to 1.7 times more likely to die in a fire than a woman. This

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				increase may relate to factors other than sex and is assessed within the age protected characteristic, this leads to a neutral impact on communities. Any changes to staff ways of working will be assessed through a dedicated PIA. Early engagement feedback has highlighted a potential negative impact if this proposal leads to changes in staff ways of working, due to family commitments and caring responsibilities. To evaluate the impacts on groups from protected characteristics we will undertake a PIA tailored to the change, this will include responding to feedback from the consultation, depending on personal circumstances this may highlight both positive and negative impacts.
	X			**2. Review the capability and locations of our specialist vehicles and equipment so our resources are aligned to current and future risks.**

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				The proposal to review specialist vehicles and equipment will be aligned to risk and a dedicated PIA will assess impacts on protected characteristics within the communities and staff. Specialist vehicles do not include front line fire appliances (fire engines). This proposal will not impact on the response target within Surrey. This means there will not be an increase in the time it takes to initially response to emergency incidents. The impact remains neutral, however there may be positive impacts identified following the review.
	X			**3. Review current resources at Camberley Fire Station and consider relocation options within the boroughs of Spelthorne, Elmbridge and Runnymede..** The proposal to review resources in Camberley is a phase two proposal, the review will be undertaken at year two to three of the CRMP (2026-27) and at this time a dedicated PIA will be

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes): Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				completed, assessing the impacts on protected characteristics within the communities and of our staff. Changes to existing resources in the Camberley area are neutral to sex as a protected characteristic. As with the earlier proposal on the relocation of Banstead to Godstone, the CRP highlights little evidence linking sex to risk of/from fire (or other risk covered by the CRMP), the only relationship is identified by the Home Office around fire related fatality in older men. The CRP gives evidence that age is a key factor in fire risk, 65 and over is a fire vulnerability factor. Men over the age of 65 are up to 1.7 times more likely to die in a fire than a woman. This increase may relate to factors other than sex and is assessed within the age protected characteristic, where it highlights that a change in resources could have a positive or negative impact. If resources are reduced during the day this will have a negative impact, however nighttime cover would increase, potentially creating a positive impact. The review will highlight this in the dedicated PIA, alongside how consultation feedback has been reflected within it.

People Impact Assessment (PIA) Template

Page 304	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working or work locations have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**4. We will develop a response model which responds to fluctuating risk and seasonal demand.** The proposal to develop a response model to respond to changing risk and seasonal demand will include a dedicated PIA, however as the response model will focus on additional resources any

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				impacts are likely to remain neutral or have a positive impact, this will be assessed against all protected characteristics.
	X			**5. We have reviewed the weekend availability of our On-Call staff and its impact on risk within the CRP (Community Risk Profile) therefore we will match our resource availability to risk.** As with the earlier proposals relating to movement of resources, the CRP highlights little evidence linking sex to risk of/from fire (or other risk covered by the CRMP), the only relationship is identified by the Home Office around fire related fatality in older men. The CRP gives evidence that age is a key factor in fire risk, 65 and over is a fire vulnerability factor. Men over the age of 65 are up to 1.7 times more likely to die in a fire than a woman. This increase may relate to factors other than sex and is assessed within the age protected characteristic, where it highlights that a change in resources could have a positive or negative impact.

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				With little evidence linking sex to risk of/from fire and risk and impacts considered under the protected characteristic on age there is a neutral impact. The impact more broadly of moving daytime weekend cover to during the night will have minimal impact due to on-call firefighters needing to get to the fire station to pick up the fire engine, which leads to a planned delay within the existing response model. Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	X			**6. Review existing prevention, protection, and response arrangements in Haslemere to ensure the most appropriate allocation of resources.** The proposal to review existing prevention, protection and response arrangements in Haslemere will be undertaken at year two to three of the CRMP (2026-27) and at this time a dedicated PIA will be completed, assessing the impacts on protected characteristics within the communities and of our staff. This assessment will evaluate the effects of these safety measures on the protected characteristics of both the communities and staff involved. The provision of prevention, protection and response services to the communities in Haslemere will remain in place and for this protected characteristic is likely to remain neutral.

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working or work locations have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**7. A further review of our On-call availability to ensure an appropriate level of provision throughout the week.** As with earlier proposals relating to the potential movement of resources, the CRP highlights little evidence linking sex to risk of/from fire (or other risk covered by the CRMP), the only relationship is identified by the Home Office around fire related fatality in older men. The CRP gives evidence that

People Impact Assessment (PIA) Template

Page 309	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				age is a key factor in fire risk, 65 and over is a fire vulnerability factor. Men over the age of 65 are up to 1.7 times more likely to die in a fire than a woman. This increase may relate to factors other than sex and is assessed within the age protected characteristic, where it highlights that a change in resources could have a positive or negative impact. Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**8. We will implement 12-hour shifts on the current 2-2-4 rota pattern to align to risk and demand to increase capacity for prevention and protection activities.**

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	Neutral Impact:	Positive Impact:	Negative Impact:	
				The proposal to implement 12 hour shifts more widely within the Service, does not have an impact on our communities. The impact is neutral, however for men 65 and over, highlighted under the age protected characteristic, and more broadly within our communities, this may lead to a positive impact due to an increase in the prevention and community safety activities undertaken. This will be accessed during the delivery of the CRMP to understand the impacts. This proposal will change staff ways of working and will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. Initial feedback from early engagement has highlighted changes to ways of working having a potential negative impact on staff due to family commitments and caring responsibilities.

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	X			**9. Working with our health partners to respond to those who are most vulnerable in Surrey.** Increased community safety initiatives, working with our health partners and expanding the types of incidents the service responds to is likely to have a positive impact on some protected characteristics and more widely within our communities. This proposal spans across all three phases of the CRMP and dedicated PIAs will be undertaken on changes to how we support our heath partners and any potential changes to our ways of workings.
Race (All Racial Groups)				**Short narrative of data** *The 2021 census shows that Surrey is composed of the following ethnicities: White (85.5%), Asian, Asian British or Asian Welsh (7.7%), Mixed or Multiple ethnic groups (3.4%), Black, Black British,*

![Surrey Fire & Rescue Service logo]

People Impact Assessment (PIA) Template

Page 312	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				Black Welsh, Caribbean or African (1.7%), and Other ethnic group (1.7%). The highest minority groups in the district/borough breakdown is Woking with 14.2% Asian, Asian British or Asian Welsh, followed by Spelthorne (12.8%) and Epsom and Ewel (11.4%) in the same group. Others include Reigate and Banstead (2.9%) and Spelthorne (2.5%) with Black, Black British, Black Welsh, Caribbean or African. Epsom and Ewell has the highest Mixed or Multiple ethnic groups (4.4%). The CRP does not link race to any increase or decrease in fire risk or other risk covered by the CRMP.
	X			**1. Relocate the current Banstead fire engine and crew to Godstone Fire Station in 2026, following an updated and extensive review of any options within the Whyteleafe area.** The CRP does not link race to any increase or decrease in fire risk or other risk covered by the CRMP. his leads to a neutral impact on communities.

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				Any changes to staff ways of working will be assessed through a dedicated PIA. Early engagement feedback has highlighted a potential negative impact if this proposal leads to changes in staff ways of working, due to family commitments and caring responsibilities. To evaluate the impacts on groups from protected characteristics we will undertake a PIA tailored to the change, this will include responding to feedback from the consultation, depending on personal circumstances this may highlight both positive and negative impacts.
	X			**2. Review the capability and locations of our specialist vehicles and equipment so our resources are aligned to current and future risks.** The proposal to review specialist vehicles and equipment will be aligned to risk and a dedicated PIA will assess impacts on protected characteristics within the communities and staff. Specialist

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	Neutral Impact:	Positive Impact:	Negative Impact:	
				vehicles do not include front line fire appliances (fire engines). This proposal will not impact on the response target within Surrey. This means there will not be an increase in the time it takes to initially response to emergency incidents. The impact remains neutral, supported by the CRP not evidencing a race link to any increase or decrease in fire risk or other risk covered by the CRMP.
	X			**3. Review current resources at Camberley Fire Station and consider relocation options within the boroughs of Spelthorne, Elmbridge and Runnymede.W.**
				The proposal to review resources in Camberley is a phase two proposal, the review will be undertaken at year two to three of the CRMP (2026-27) and at this time a dedicated PIA will be completed, assessing the impacts on protected characteristics within the communities and of our staff. The CRP does not link race to any increase or decrease in fire risk or other risk covered by the CRMP, this leads to a neutral impact on communities.

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				If resources are reduced during the day this will may have a negative impact on other protected characteristics, however nighttime cover would increase, potentially creating a positive impact. The review will highlight this in the dedicated PIA, alongside how consultation feedback has been reflected within it. Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working or work locations have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.

6

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	X			**4. We will develop a response model which responds to fluctuating risk and seasonal demand.** The proposal to develop a response model to respond to changing risk and seasonal demand will include a dedicated PIA, however as the response model will focus on additional resources any impacts are likely to remain neutral or have a positive impact, this will be assessed against all protected characteristics.
	X			**5. We have reviewed the weekend availability of our On-Call staff and its impact on risk within the CRP (Community Risk Profile) therefore we will match our resource availability to risk.**

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				The CRP does not link race to any increase or decrease in fire risk or other risk covered by the CRMP. his leads to a neutral impact on communities. The impact more broadly of moving daytime weekend cover to during the night will have minimal impact due to on-call firefighters needing to get to the fire station to pick up the fire engine, which leads to a planned delay within the existing response model. Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.

6

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	X			**6. Review existing prevention, protection, and response arrangements in Haslemere to ensure the most appropriate allocation of resources.** The proposal to review existing prevention, protection and response arrangements in Haslemere will be undertaken at year two to three of the CRMP (2026-27) and at this time a dedicated PIA will be completed, assessing the impacts on protected characteristics within the communities and of our staff. This assessment will evaluate the effects of these safety measures on the protected characteristics of both the communities and staff involved. The provision of prevention, protection and response services to the communities in Haslemere will remain in place and for this protected characteristic is likely to remain neutral.

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working or work locations have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**7. A further review of our On-call availability to ensure an appropriate level of provision throughout the week.** The CRP does not link race to any increase or decrease in fire risk or other risk covered by the CRMP. his leads to a neutral impact on communities.

People Impact Assessment (PIA) Template

Page 320	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**8. We will implement 12-hour shifts on the current 2-2-4 rota pattern to align to risk and demand to increase capacity for prevention and protection activities.** The proposal to implement 12 hour shifts more widely within the Service, does not have an impact on our communities. The impact is neutral; however this may lead to a positive impact more broadly due to an increase in the prevention and community safety activities undertaken. This will be accessed during the delivery of the CRMP to understand the impacts.

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				This proposal will change staff ways of working and will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. Initial feedback from early engagement has highlighted changes to ways of working having a potential negative impact on staff due to family commitments and caring responsibilities.
	X			**9. Working with our health partners to respond to those who are most vulnerable in Surrey.** Increased community safety initiatives, working with our health partners and expanding the types of incidents the service responds to is likely to have a positive impact on some protected characteristics and more widely within our communities. This proposal spans across all three

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes): Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				phases of the CRMP and dedicated PIAs will be undertaken on changes to how we support our heath partners and any potential changes to our ways of workings.
Disability (Mental, Physical, and Carers of Disabled people)				**Short narrative of data** *According to the 2021 census data, 26% of households in Surrey contain someone with a disability, with Mole Valley, Runnymede, and Tandridge recording the highest rates at 28%. Additionally, 8% of the population in Surrey provide unpaid care. Around 1 in 50 in Surrey provide more than 50 hours unpaid care per week. The CRP historic data shows that people with disability are vulnerable and more likely to be impacted by fire. People with mobility issues may find it harder to evacuate and are more likely to be injured or injure themselves.* *Poor mental health is a contributory factor to fire deaths. While the numbers of people exhibiting hoarding behaviour is unknown in Surrey, it is presumed to be a small proportion of the population.*

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				However, CRP data showed hoarding was present in half of Surrey's accidental dwelling fire fatalities. *In contrast, Dementia is already a prevalent condition and one that is expected to rise. Those with dementia may be more at risk of causing accidental fires and may be less able to self-rescue or respond to smoke alarms. The number of people aged 65 and over with dementia in Surrey is predicted to increase 22% (2020 to 2030). Tandridge is estimated to have a marginally higher proportion of residents +65 with Dementia (7.9%) compared with the average for Surrey (7.4%). Reigate and Banstead (6.2%) is estimated to have a slightly lower proportion of residents +65 with Dementia, compared with Epsom and Ewell (7.2%). However, given Reigate and Banstead's population is almost double that of Epsom and Ewell, the absolute numbers of residents with Dementia in Reigate and Banstead is higher. For younger residents (18 to 24), common mental disorders, physical and learning disabilities and autistic spectrum disorders are factors that increase their vulnerability to fire. Except for common mental disorders, these factors are all predicted to have small percentage increases between 2020 and 2030.*

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
		X	X	**1. Relocate the current Banstead fire engine and crew to Godstone Fire Station in 2026, following an updated and extensive review of any options within the Whyteleafe area.** There is a Surrey-wide response standard and no individual standards are set for Borough and Districts, the Surrey-wide response standard continues to be the measure of our response and is predicated on sending the nearest and quickest resources that are available, however the modelling that is undertaken as part of developing the proposals includes a breakdown to inform the impacts and mitigations. The relocation of Banstead fire engine to Godstone will increase average critical response times in Reigate and Banstead (40 seconds) and Epsom and Ewell (five seconds), though remaining well within the target response time of 10 minutes. This impact may lead to a negative impact on disability as a protected characteristic within these locations, CRP data highlights:

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				• Reigate and Banstead have a slightly lower proportion of residents aged 65 and over with dementia at 6.2% compared to the average for Surrey. • However, given that the population of Reigate and Banstead is almost double that of Epsom and Ewell, the absolute number of residents with dementia in Reigate and Banstead is higher. • The proportion of residents aged 65 and over with dementia in Epsom and Ewell is estimated to be 7.2%, close to the average for Surrey. There is the potential of a more positive impact within Tandridge, average response times to critical incidents is the longest within Surrey and this will be reduced (10 seconds): • Tandridge is one of the areas in Surrey with the highest rates of households containing someone with a disability, at 28%.

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				• The number of people aged 65 and over with dementia in Tandridge is estimated to be higher than the average for Surrey, at 7.9% compared to 7.4%. A dedicated PIA will assess impacts on protected characteristics within the communities and feedback from the consultation will inform assessment and impacts. Any changes to staff ways of working will be assessed through a dedicated PIA. Early engagement feedback has highlighted a potential negative impact if this proposal leads to changes in staff ways of working, due to family commitments and caring responsibilities. To evaluate the impacts on groups from protected characteristics we will undertake a PIA tailored to the change, this will include responding to feedback from the consultation, depending on personal circumstances this may highlight both positive and negative impacts.

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	X			**2. Review the capability and locations of our specialist vehicles and equipment so our resources are aligned to current and future risks.** The proposal to review specialist vehicles and equipment will be aligned to risk and a dedicated PIA will assess impacts on protected characteristics within the communities and staff. Specialist vehicles do not include front line fire appliances (fire engines). This proposal will not impact on the response target within Surrey. This means there will not be an increase in the time it takes to initially response to emergency incidents. The impact remains neutral, supported by the CRP not evidencing a race link to any increase or decrease in fire risk or other risk covered by the CRMP.
	X			**3. Review current resources at Camberley Fire Station and consider relocation options within the boroughs of Spelthorne, Elmbridge and Runnymede.**

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				The proposal to review resources in Camberley is a phase two proposal, the review will be undertaken at year two to three of the CRMP (2026-27) and at this time a dedicated PIA will be completed, assessing the impacts on protected characteristics within the communities and of our staff.

If resources are reduced during the day this will may have a negative impact on disability protected characteristics within a small number of borough and districts, however nighttime cover would increase, potentially creating a positive impact. The review will highlight this in the dedicated PIA, alongside how consultation feedback has been reflected within it.

Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early |

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				engagement changes to ways of working or work locations have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**4. We will develop a response model which responds to fluctuating risk and seasonal demand.** The proposal to develop a response model to respond to changing risk and seasonal demand will include a dedicated PIA, however as the response model will focus on additional resources any impacts are likely to remain neutral or have a positive impact, this will be assessed against all protected characteristics.

People Impact Assessment (PIA) Template

Page 330	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	X			**5. We have reviewed the weekend availability of our On-Call staff and its impact on risk within the CRP (Community Risk Profile) therefore we will match our resource availability to risk.** The CRP does evidence a link disability to an increase in fire risk or other risk covered by the CRMP, however moving daytime weekend cover to during the night will have minimal impact due to on-call firefighters needing to get to the fire station to pick up the fire engine, which leads to a planned delay within the existing response model. Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early

People Impact Assessment (PIA) Template

Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):
				engagement changes to ways of working have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**6. Review existing prevention, protection, and response arrangements in Haslemere to ensure the most appropriate allocation of resources.** The proposal to review existing prevention, protection and response arrangements in Haslemere will be undertaken at year two to three of the CRMP (2026-27) and at this time a dedicated PIA will be completed, assessing the impacts on protected characteristics within the communities and of our staff.

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				This assessment will evaluate the effects of these safety measures on the protected characteristics of both the communities and staff involved. The provision of prevention, protection and response services to the communities in Haslemere will remain in place and for this protected characteristic is likely to remain neutral. Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working or work locations have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	X			**7. A further review of our On-call availability to ensure an appropriate level of provision throughout the week.** The CRP does link disability to an increase in fire risk and other risk covered by the CRMP. A dedicated PIA will be completed, assessing the impacts on protected characteristics within the communities and of our staff. Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.

People Impact Assessment (PIA) Template

Page 334	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	X			**8. We will implement 12-hour shifts on the current 2-2-4 rota pattern to align to risk and demand to increase capacity for prevention and protection activities.** The proposal to implement 12 hour shifts more widely within the Service, does not have an impact on our communities. The impact is neutral, however for this protected characteristic and more broadly within our communities, this may lead to a positive impact due to an increase in the prevention and community safety activities undertaken. This will be accessed during the delivery of the CRMP to understand the impacts. This proposal will change staff ways of working and will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. Initial feedback from early engagement has highlighted changes to ways of working having a potential negative impact on staff due to family commitments and caring responsibilities.

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	X			**9. Working with our health partners to respond to those who are most vulnerable in Surrey.** Increased community safety initiatives, working with our health partners and expanding the types of incidents the service responds to is likely to have a positive impact on some protected characteristics and more widely within our communities. This proposal spans across all three phases of the CRMP and dedicated PIAs will be undertaken on changes to how we support our heath partners and any potential changes to our ways of workings.
Religion or Belief				Short narrative of data

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				The 2021 census shows Surrey is made up of Christian (50.1%), No religion (36.6%), Muslim (3.2%), Hindu (2.0%), Buddhist (0.6%), Sikh (0.6%), Jewish (0.3%), other (0.5%) and no answer (6.3%). The largest deviation away from the average is in the Muslim classification; Woking with 9.4% followed by Epsom and Ewell (4.9%), and Spelthorne (4.0%). Spelthorne also has a noticeably higher proportion of Sikh (2.5%). The CRP does not link religion or belief to any increase or decrease in fire risk or other risk covered by the CRMP.
	X			**1. Relocate the current Banstead fire engine and crew to Godstone Fire Station in 2026, following an updated and extensive review of any options within the Whyteleafe area.** The CRP does not link religion or belief to any increase or decrease in fire risk or other risk covered by the CRMP. This leads to a neutral impact on communities. Any changes to staff ways of working will be assessed through a dedicated PIA. Early engagement feedback has highlighted a potential negative impact if this proposal leads to changes in staff ways

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				of working, due to family commitments, caring responsibilities and religious obligations. To evaluate the impacts on groups from protected characteristics we will undertake a PIA tailored to the change, this will include responding to feedback from the consultation, depending on personal circumstances this may highlight both positive and negative impacts.
	X			**2. Review the capability and locations of our specialist vehicles and equipment so our resources are aligned to current and future risks.** The proposal to review specialist vehicles and equipment will be aligned to risk and a dedicated PIA will assess impacts on protected characteristics within the communities and staff. Specialist vehicles do not include front line fire appliances (fire engines). This proposal will not impact on the response target within Surrey. This means there will not be an increase in the time it takes to initially response to emergency incidents. The impact remains neutral, supported by the CRP not evidencing a race link to any increase or decrease in fire risk or other risk covered by the CRMP.

People Impact Assessment (PIA) Template

Page 338	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	X			**3.** <u>**Review current resources at Camberley Fire Station and consider relocation options within the boroughs of Spelthorne, Elmbridge and Runnymede**</u> The proposal to review resources in Camberley is a phase two proposal, the review will be undertaken at year two to three of the CRMP (2026-27) and at this time a dedicated PIA will be completed, assessing the impacts on protected characteristics within the communities and of our staff. The CRP does not link religion or belief to any increase or decrease in fire risk or other risk covered by the CRMP, this leads to a neutral impact on communities. If resources are reduced during the day this will may have a negative impact on other protected characteristics, however nighttime cover would increase, potentially creating a positive impact. The review will highlight this in the dedicated PIA, alongside how consultation feedback has been reflected within it.

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working or work locations have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**4. We will develop a response model which responds to fluctuating risk and seasonal demand.** The proposal to develop a response model to respond to changing risk and seasonal demand will include a dedicated PIA, however as the response model will focus on additional resources any impacts are likely to remain neutral or have a positive impact, this will be assessed against all protected characteristics.

People Impact Assessment (PIA) Template

Page 340	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	X			**5. We have reviewed the weekend availability of our On-Call staff and its impact on risk within the CRP (Community Risk Profile) therefore we will match our resource availability to risk.** The CRP does not link religion or belief to any increase or decrease in fire risk or other risk covered by the CRMP. his leads to a neutral impact on communities. The impact more broadly of moving daytime weekend cover to during the night will have minimal impact due to on-call firefighters needing to get to the fire station to pick up the fire engine, which leads to a planned delay within the existing response model. Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				engagement changes to ways of working have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**6. Review existing prevention, protection, and response arrangements in Haslemere to ensure the most appropriate allocation of resources.** The proposal to review existing prevention, protection and response arrangements in Haslemere will be undertaken at year two to three of the CRMP (2026-27) and at this time a dedicated PIA will be completed, assessing the impacts on protected characteristics within the communities and of our staff. This assessment will evaluate the effects of these safety measures on the protected characteristics of both the communities and staff involved. The provision of prevention, protection and response

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				services to the communities in Haslemere will remain in place and for this protected characteristic is likely to remain neutral. Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working or work locations have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**7. A further review of our On-call availability to ensure an appropriate level of provision throughout the week.** The CRP does not link religion or belief to any increase or decrease in fire risk or other risk covered by the CRMP. his leads to a neutral impact on communities.

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**8. We will implement 12-hour shifts on the current 2-2-4 rota pattern to align to risk and demand to increase capacity for prevention and protection activities.** The proposal to implement 12 hour shifts more widely within the Service, does not have an impact on our communities. The impact is neutral; however this may lead to a positive impact more broadly due to an increase in the prevention and community safety activities undertaken. This will be accessed during the delivery of the CRMP to understand the impacts.

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				This proposal will change staff ways of working and will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. Initial feedback from early engagement has highlighted changes to ways of working having a potential negative impact on staff due to family commitments and caring responsibilities.
	X			**9. Working with our health partners to respond to those who are most vulnerable in Surrey.** Increased community safety initiatives, working with our health partners and expanding the types of incidents the service responds to is likely to have a positive impact on some protected

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				characteristics and more widely within our communities. This proposal spans across all three phases of the CRMP and dedicated PIAs will be undertaken on changes to how we support our heath partners and any potential changes to our ways of workings.
Sexual Orientation (Lesbian, Gay, Bisexual, and Heterosexual)				Short narrative of data *The census from 2021 shows that in Surrey 90.7% of people are Straight or Heterosexual, 1.2% are Gay or Lesbian, 1.1% identify as Bisexual, and 0.3% are in the All other sexual orientations group (6.9% chose not to answer). Across Surrey this is quite uniform with the only notable differences in the Bisexual classification in Guildford and Runnymede both 1.7%. The CRP does not link sexual orientation to any increase or decrease in fire risk or other risk covered by the CRMP.*

People Impact Assessment (PIA) Template

Page 346	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	X			**1. Relocate the current Banstead fire engine and crew to Godstone Fire Station in 2026, following an updated and extensive review of any options within the Whyteleafe area.** The CRP does not link sexual orientation to any increase or decrease in fire risk or other risk covered by the CRMP. his leads to a neutral impact on communities. Any changes to staff ways of working will be assessed through a dedicated PIA. Early engagement feedback has highlighted a potential negative impact if this proposal leads to changes in staff ways of working, due to family commitments and caring responsibilities. To evaluate the impacts on groups from protected characteristics we will undertake a PIA tailored to the change, this will include responding to feedback from the consultation, depending on personal circumstances this may highlight both positive and negative impacts.

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	X			**2. Review the capability and locations of our specialist vehicles and equipment so our resources are aligned to current and future risks.** The proposal to review specialist vehicles and equipment will be aligned to risk and a dedicated PIA will assess impacts on protected characteristics within the communities and staff. Specialist vehicles do not include front line fire appliances (fire engines). This proposal will not impact on the response target within Surrey. This means there will not be an increase in the time it takes to initially response to emergency incidents. The impact remains neutral, supported by the CRP not evidencing a race link to any increase or decrease in fire risk or other risk covered by the CRMP.
	X			**3. Review current resources at Camberley Fire Station and consider relocation options within the boroughs of Spelthorne, Elmbridge and Runnymede.** The proposal to review resources in Camberley is a phase two proposal, the review will be undertaken at year two to three of the CRMP (2026-27) and at this time a dedicated PIA will be

People Impact Assessment (PIA) Template

Page 348	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				completed, assessing the impacts on protected characteristics within the communities and of our staff. The CRP does not link to sexual orientation to any increase or decrease in fire risk or other risk covered by the CRMP, this leads to a neutral impact on communities.
				If resources are reduced during the day this will may have a negative impact on other protected characteristics, however nighttime cover would increase, potentially creating a positive impact. The review will highlight this in the dedicated PIA, alongside how consultation feedback has been reflected within it.
				Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				engagement changes to ways of working or work locations have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**4. We will develop a response model which responds to fluctuating risk and seasonal demand.** The proposal to develop a response model to respond to changing risk and seasonal demand will include a dedicated PIA, however as the response model will focus on additional resources any impacts are likely to remain neutral or have a positive impact, this will be assessed against all protected characteristics.
	X			**5. We have reviewed the weekend availability of our On-Call staff and its impact on risk within the CRP (Community Risk Profile) therefore we will match our resource availability to risk.**

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				The CRP does not link sexual orientation to any increase or decrease in fire risk or other risk covered by the CRMP. his leads to a neutral impact on communities. The impact more broadly of moving daytime weekend cover to during the night will have minimal impact due to on-call firefighters needing to get to the fire station to pick up the fire engine, which leads to a planned delay within the existing response model. Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	X			**6. Review existing prevention, protection, and response arrangements in Haslemere to ensure the most appropriate allocation of resources.** The proposal to review existing prevention, protection and response arrangements in Haslemere will be undertaken at year two to three of the CRMP (2026-27) and at this time a dedicated PIA will be completed, assessing the impacts on protected characteristics within the communities and of our staff. This assessment will evaluate the effects of these safety measures on the protected characteristics of both the communities and staff involved. The provision of prevention, protection and response services to the communities in Haslemere will remain in place and for this protected characteristic is likely to remain neutral.

People Impact Assessment (PIA) Template

Page 352

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working or work locations have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**7. A further review of our On-call availability to ensure an appropriate level of provision throughout the week.** The CRP does not link sexual orientation to any increase or decrease in fire risk or other risk covered by the CRMP. his leads to a neutral impact on communities. Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal

People Impact Assessment (PIA) Template

Page 353	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**8. We will implement 12-hour shifts on the current 2-2-4 rota pattern to align to risk and demand to increase capacity for prevention and protection activities.** The proposal to implement 12 hour shifts more widely within the Service, does not have an impact on our communities. The impact is neutral; however this may lead to a positive impact more broadly due to an increase in the prevention and community safety activities undertaken. This will be accessed during the delivery of the CRMP to understand the impacts. This proposal will change staff ways of working and will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending

People Impact Assessment (PIA) Template

Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				on personal circumstances, individuals may experience both positive and negative impacts. Initial feedback from early engagement has highlighted changes to ways of working having a potential negative impact on staff due to family commitments and caring responsibilities.
	X			**9. Working with our health partners to respond to those who are most vulnerable in Surrey.** Increased community safety initiatives, working with our health partners and expanding the types of incidents the service responds to is likely to have a positive impact on some protected characteristics and more widely within our communities. This proposal spans across all three phases of the CRMP and dedicated PIAs will be undertaken on changes to how we support our heath partners and any potential changes to our ways of workings.

"What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):"

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
Pregnancy and Maternity				Short narrative of data *Data from the Office for National Statistics shows that birth rates in Surrey are equal to 1% of the population. This suggests that approximately 1% of the Surrey population is pregnant within the space of 1 year. Of those giving birth, the greatest proportion are from Reigate and Banstead residents with 14.1% of all births, followed by Elmbridge (11.8%) and Guildford (11.0%). The lowest areas are Mole Valley (6.0%) and Epsom and Ewell (6.5%). The CRP does not link pregnancy and maternity to any increase or decrease in fire risk or other risk covered by the CRMP.*
	X			1. **Relocate the current Banstead fire engine and crew to Godstone Fire Station in 2026, following an updated and extensive review of any options within the Whyteleafe area.** The CRP does not link pregnancy and maternity to any increase or decrease in fire risk or other risk covered by the CRMP. his leads to a neutral impact on communities.

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				Any changes to staff ways of working will be assessed through a dedicated PIA. Early engagement feedback has highlighted a potential negative impact if this proposal leads to changes in staff ways of working, due to family commitments and caring responsibilities. To evaluate the impacts on groups from protected characteristics we will undertake a PIA tailored to the change, this will include responding to feedback from the consultation, depending on personal circumstances this may highlight both positive and negative impacts.
	X			**2. Review the capability and locations of our specialist vehicles and equipment so our resources are aligned to current and future risks.** The proposal to review specialist vehicles and equipment will be aligned to risk and a dedicated PIA will assess impacts on protected characteristics within the communities and staff. Specialist vehicles do not include front line fire appliances (fire engines). This proposal will not impact on the response target within Surrey. This means there will not be an increase in the time it takes to

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				initially response to emergency incidents. The impact remains neutral, supported by the CRP not evidencing a race link to any increase or decrease in fire risk or other risk covered by the CRMP.
	X			**3.** **Review current resources at Camberley Fire Station and consider relocation options within the boroughs of Spelthorne, Elmbridge and Runnymede.** The proposal to review resources in Camberley is a phase two proposal, the review will be undertaken at year two to three of the CRMP (2026-27) and at this time a dedicated PIA will be completed, assessing the impacts on protected characteristics within the communities and of our staff. The CRP does not link pregnancy or maternity to any increase or decrease in fire risk or other risk covered by the CRMP, this leads to a neutral impact on communities. If resources are reduced during the day this will may have a negative impact on other protected characteristics, however nighttime cover would increase, potentially creating a positive impact. The

People Impact Assessment (PIA) Template

Page 358

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				review will highlight this in the dedicated PIA, alongside how consultation feedback has been reflected within it. Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working or work locations have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**4. We will develop a response model which responds to fluctuating risk and seasonal demand.** The proposal to develop a response model to respond to changing risk and seasonal demand will include a dedicated PIA, however as the response model will focus on additional resources any

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				impacts are likely to remain neutral or have a positive impact, this will be assessed against all protected characteristics.
	X			**5. We have reviewed the weekend availability of our On-Call staff and its impact on risk within the CRP (Community Risk Profile) therefore we will match our resource availability to risk.** The CRP does not link pregnancy or maternity to any increase or decrease in fire risk or other risk covered by the CRMP. his leads to a neutral impact on communities. The impact more broadly of moving daytime weekend cover to during the night will have minimal impact due to on-call firefighters needing to get to the fire station to pick up the fire engine, which leads to a planned delay within the existing response model.

People Impact Assessment (PIA) Template

Page 360	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**6. Review existing prevention, protection, and response arrangements in Haslemere to ensure the most appropriate allocation of resources.** The proposal to review existing prevention, protection and response arrangements in Haslemere will be undertaken at year two to three of the CRMP (2026-27) and at this time a dedicated PIA will be completed, assessing the impacts on protected characteristics within the communities and of our staff.

People Impact Assessment (PIA) Template

Page 361	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				This assessment will evaluate the effects of these safety measures on the protected characteristics of both the communities and staff involved. The provision of prevention, protection and response services to the communities in Haslemere will remain in place and for this protected characteristic is likely to remain neutral. Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working or work locations have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	X			**7. A further review of our On-call availability to ensure an appropriate level of provision throughout the week.** The CRP does not link pregnancy or maternity to any increase or decrease in fire risk or other risk covered by the CRMP. This leads to a neutral impact on communities. Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**8. We will implement 12-hour shifts on the current 2-2-4 rota pattern to align to risk and demand to increase capacity for prevention and protection activities.**

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				The proposal to implement 12 hour shifts more widely within the Service, does not have an impact on our communities. The impact is neutral; however this may lead to a positive impact more broadly due to an increase in the prevention and community safety activities undertaken. This will be accessed during the delivery of the CRMP to understand the impacts. This proposal will change staff ways of working and will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. Initial feedback from early engagement has highlighted changes to ways of working having a potential negative impact on staff due to family commitments and caring responsibilities.
	X			**9. Working with our health partners to respond to those who are most vulnerable in Surrey.**

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				Increased community safety initiatives, working with our health partners and expanding the types of incidents the service responds to is likely to have a positive impact on some protected characteristics and more widely within our communities. This proposal spans across all three phases of the CRMP and dedicated PIAs will be undertaken on changes to how we support our heath partners and any potential changes to our ways of workings.
Marital Status (Married and Civil Partnerships)				Short narrative of data *The Census in 2021 shows that in Surrey 50.6% of the population (over the age of 16) are married or in a civil partnership, 33.1% never married or registered in a civil partnership, 8.4% divorced or dissolved, 6.0% widowed or surviving partner, and 1.9% are separated but still married/partnered. The CRP shows that living alone is a vulnerability factor although this is not directly linked to marriage or civil partnership.*

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes): Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
		X	X	**1. Relocate the current Banstead fire engine and crew to Godstone Fire Station in 2026, following an updated and extensive review of any options within the Whyteleafe area.** The CRP does not link marital status to any increase or decrease in fire risk or other risk covered by the CRMP. This leads to a neutral impact on communities. Any changes to staff ways of working will be assessed through a dedicated PIA. Early engagement feedback has highlighted a potential negative impact if this proposal leads to changes in staff ways of working, due to family commitments and caring responsibilities. To evaluate the impacts on groups from protected characteristics we will undertake a PIA tailored to the change, this will include responding to feedback from the consultation, depending on personal circumstances this may highlight both positive and negative impacts.

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	X			**2. Review the capability and locations of our specialist vehicles and equipment so our resources are aligned to current and future risks.** The proposal to review specialist vehicles and equipment will be aligned to risk and a dedicated PIA will assess impacts on protected characteristics within the communities and staff. Specialist vehicles do not include front line fire appliances (fire engines). This proposal will not impact on the response target within Surrey. This means there will not be an increase in the time it takes to initially response to emergency incidents. The impact remains neutral, supported by the CRP not evidencing a race link to any increase or decrease in fire risk or other risk covered by the CRMP.
	X			**3. Review current resources at Camberley Fire Station and consider relocation options within the boroughs of Spelthorne, Elmbridge and Runnymede.**

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				The proposal to review resources in Camberley is a phase two proposal, the review will be undertaken at year two to three of the CRMP (2026-27) and at this time a dedicated PIA will be completed, assessing the impacts on protected characteristics within the communities and of our staff. The CRP does not link married status to any increase or decrease in fire risk or other risk covered by the CRMP, this leads to a neutral impact on communities.
				If resources are reduced during the day this will may have a negative impact on other protected characteristics, however nighttime cover would increase, potentially creating a positive impact. The review will highlight this in the dedicated PIA, alongside how consultation feedback has been reflected within it.
				Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal

People Impact Assessment (PIA) Template

Page 368	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working or work locations have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**4. We will develop a response model which responds to fluctuating risk and seasonal demand.** The proposal to develop a response model to respond to changing risk and seasonal demand will include a dedicated PIA, however as the response model will focus on additional resources any impacts are likely to remain neutral or have a positive impact, this will be assessed against all protected characteristics.

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	X			**5. We have reviewed the weekend availability of our On-Call staff and its impact on risk within the CRP (Community Risk Profile) therefore we will match our resource availability to risk.** The CRP does not link marital status to any increase or decrease in fire risk or other risk covered by the CRMP. his leads to a neutral impact on communities. The impact more broadly of moving daytime weekend cover to during the night will have minimal impact due to on-call firefighters needing to get to the fire station to pick up the fire engine, which leads to a planned delay within the existing response model. Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early

People Impact Assessment (PIA) Template

Page 370	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				engagement changes to ways of working have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**6. Review existing prevention, protection, and response arrangements in Haslemere to ensure the most appropriate allocation of resources.** The proposal to review existing prevention, protection and response arrangements in Haslemere will be undertaken at year two to three of the CRMP (2026-27) and at this time a dedicated PIA will be completed, assessing the impacts on protected characteristics within the communities and of our staff. This assessment will evaluate the effects of these safety measures on the protected characteristics of both the communities and staff involved. The provision of prevention, protection and response

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				services to the communities in Haslemere will remain in place and for this protected characteristic is likely to remain neutral.
				Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working or work locations have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**7. A further review of our On-call availability to ensure an appropriate level of provision throughout the week.**

6

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				The CRP does not link pregnancy or maternity to any increase or decrease in fire risk or other risk covered by the CRMP. This leads to a neutral impact on communities.
				Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**8. We will implement 12-hour shifts on the current 2-2-4 rota pattern to align to risk and demand to increase capacity for prevention and protection activities.**

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes): Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				The proposal to implement 12 hour shifts more widely within the Service, does not have an impact on our communities. The impact is neutral; however this may lead to a positive impact more broadly due to an increase in the prevention and community safety activities undertaken. This will be accessed during the delivery of the CRMP to understand the impacts. This proposal will change staff ways of working and will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. Initial feedback from early engagement has highlighted changes to ways of working having a potential negative impact on staff due to family commitments and caring responsibilities.
	X			**9. Working with our health partners to respond to those who are most vulnerable in Surrey.**

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				Increased community safety initiatives, working with our health partners and expanding the types of incidents the service responds to is likely to have a positive impact on some protected characteristics and more widely within our communities. This proposal spans across all three phases of the CRMP and dedicated PIAs will be undertaken on changes to how we support our heath partners and any potential changes to our ways of workings.
Gender Reassignment (Includes non-binary)				Short narrative of data *The 2021 census shows that in Surrey 94.4% of people are the gender identity the same as sex registered at birth, and 5.2% did not answer the question. The remaining 0.4% is spread evenly (0.1% per group) over the following - Gender identity different from sex registered at birth but no specific identity given, Trans woman, Trans man, and All other gender identities. The CRP does not link gender reassignment to any increase or decrease in fire risk or other risk covered by the CRMP.*

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	X			**1. Relocate the current Banstead fire engine and crew to Godstone Fire Station in 2026, following an updated and extensive review of any options within the Whyteleafe area** The CRP does not link gender reassignment to any increase or decrease in fire risk or other risk covered by the CRMP. his leads to a neutral impact on communities. Any changes to staff ways of working will be assessed through a dedicated PIA. Early engagement feedback has highlighted a potential negative impact if this proposal leads to changes in staff ways of working, due to family commitments and caring responsibilities. To evaluate the impacts on groups from protected characteristics we will undertake a PIA tailored to the change, this will include responding to feedback from the consultation, depending on personal circumstances this may highlight both positive and negative impacts.

People Impact Assessment (PIA) Template

Page 376	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	X			**2. Review the capability and locations of our specialist vehicles and equipment so our resources are aligned to current and future risks.** The proposal to review specialist vehicles and equipment will be aligned to risk and a dedicated PIA will assess impacts on protected characteristics within the communities and staff. Specialist vehicles do not include front line fire appliances (fire engines). This proposal will not impact on the response target within Surrey. This means there will not be an increase in the time it takes to initially response to emergency incidents. The impact remains neutral, supported by the CRP not evidencing a race link to any increase or decrease in fire risk or other risk covered by the CRMP.
	X			**3. <u>Review current resources at Camberley Fire Station and consider relocation options within the boroughs of Spelthorne, Elmbridge and Runnymede.</u>**

People Impact Assessment (PIA) Template

Page 377	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				The proposal to review resources in Camberley is a phase two proposal, the review will be undertaken at year two to three of the CRMP (2026-27) and at this time a dedicated PIA will be completed, assessing the impacts on protected characteristics within the communities and of our staff. The CRP does not link gender reassignment to any increase or decrease in fire risk or other risk covered by the CRMP, this leads to a neutral impact on communities.

If resources are reduced during the day this will may have a negative impact on other protected characteristics, however nighttime cover would increase, potentially creating a positive impact. The review will highlight this in the dedicated PIA, alongside how consultation feedback has been reflected within it.

Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal |

People Impact Assessment (PIA) Template

Page 378	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working or work locations have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**4. We will develop a response model which responds to fluctuating risk and seasonal demand.** The proposal to develop a response model to respond to changing risk and seasonal demand will include a dedicated PIA, however as the response model will focus on additional resources any impacts are likely to remain neutral or have a positive impact, this will be assessed against all protected characteristics.

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	X			**5. We have reviewed the weekend availability of our On-Call staff and its impact on risk within the CRP (Community Risk Profile) therefore we will match our resource availability to risk.** The CRP does not link gender reassignment to any increase or decrease in fire risk or other risk covered by the CRMP. his leads to a neutral impact on communities. The impact more broadly of moving daytime weekend cover to during the night will have minimal impact due to on-call firefighters needing to get to the fire station to pick up the fire engine, which leads to a planned delay within the existing response model. Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	Neutral Impact:	Positive Impact:	Negative Impact:	
				engagement changes to ways of working have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**6. Review existing prevention, protection, and response arrangements in Haslemere to ensure the most appropriate allocation of resources.** The proposal to review existing prevention, protection and response arrangements in Haslemere will be undertaken at year two to three of the CRMP (2026-27) and at this time a dedicated PIA will be completed, assessing the impacts on protected characteristics within the communities and of our staff. This assessment will evaluate the effects of these safety measures on the protected characteristics of both the communities and staff involved. The provision of prevention, protection and response

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				services to the communities in Haslemere will remain in place and for this protected characteristic is likely to remain neutral. Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working or work locations have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**7. A further review of our On-call availability to ensure an appropriate level of provision throughout the week.** The CRP does not link gender reassignment to any increase or decrease in fire risk or other risk covered by the CRMP. This leads to a neutral impact on communities.

6

People Impact Assessment (PIA) Template

Page 382

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**8. We will implement 12-hour shifts on the current 2-2-4 rota pattern to align to risk and demand to increase capacity for prevention and protection activities.** The proposal to implement 12 hour shifts more widely within the Service, does not have an impact on our communities. The impact is neutral; however, this may lead to a positive impact more broadly due to an increase in the prevention and community safety activities undertaken. This will be accessed during the delivery of the CRMP to understand the impacts.

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				This proposal will change staff ways of working and will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. Initial feedback from early engagement has highlighted changes to ways of working having a potential negative impact on staff due to family commitments and caring responsibilities.
	X			**9. Working with our health partners to respond to those who are most vulnerable in Surrey.** Increased community safety initiatives, working with our health partners and expanding the types of incidents the service responds to is likely to have a positive impact on some protected characteristics and more widely within our communities. This proposal spans across all three

6

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				phases of the CRMP and dedicated PIAs will be undertaken on changes to how we support our heath partners and any potential changes to our ways of workings.
Age (People of all ages)				Short narrative of data *The census from 2021 shows the ages in Surrey as follows – 15 years and under (19%), 16 to 24 (10%), 25 to 34 (11%), 35 to 49 (21%), 50 to 64 (20%), and 65 and over (19%). There are a couple of areas which stand out in the 16 to 24 age group - Guildford at 16% and Runnymede at 15%. In the 65+ age group Mole Valley stands out with 24% of residents in this group. The CRP gives evidence that age is a key factor in fire risk, 65 and over is a vulnerability factor. The Home Office link fire related fatality to older age. Those aged between 65 and 79 are around 2 times as likely to die in a fire compared to the general population and that rises to 4 times as likely for those over 80 years old. This increased risk may be related to other factors experienced by people in this group, other than simply age.*

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes): / Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
		X	X	**1. Relocate the current Banstead fire engine and crew to Godstone Fire Station in 2026, following an updated and extensive review of any options within the Whyteleafe area** There is a Surrey-wide response standard and no individual standards are set for Borough and Districts, the Surrey-wide response standard continues to be the measure of our response and is predicated on sending the nearest and quickest resources that are available, however the modelling that is undertaken as part of developing the proposals includes a breakdown to inform the impacts and mitigations. The relocation of Banstead fire engine to Godstone will increase average critical response times in Reigate and Banstead (40 seconds) and Epsom and Ewell (five seconds), though remaining well within the target response time of 10 minutes. This impact may lead to a negative impact on age as a protected characteristic within these locations. It is also worth noting that other factors experienced by people in this group, other than simply age may increase the risk, and this is highlighted within the relevant protected characteristic within this PIA.

People Impact Assessment (PIA) Template

Page 386	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				• Reigate and Banstead 18% of the population is aged 65 and over. • Epsom and Ewell 18% of the population is aged 65 and over. The percentage aged 65 and over is aligned to the population of Surrey within Reigate and Banstead and Epsom and Ewell. In Tandridge there is the potential of a more positive impact where average response times to critical incidents is the longest within Surrey and this will be reduced (10 seconds), the percentage aged 65 and over is greater than the Surrey percentage: • Tandridge 21% of the population is aged 65 and over. A dedicated PIA will assess impacts on protected characteristics within the communities and feedback from the consultation will inform assessment and impacts.

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				Any changes to staff ways of working will be assessed through a dedicated PIA. Early engagement feedback has highlighted a potential negative impact if this proposal leads to changes in staff ways of working, due to family commitments and caring responsibilities. To evaluate the impacts on groups from protected characteristics we will undertake a PIA tailored to the change, this will include responding to feedback from the consultation, depending on personal circumstances this may highlight both positive and negative impacts.
	X			**2. Review the capability and locations of our specialist vehicles and equipment so our resources are aligned to current and future risks.** The proposal to review specialist vehicles and equipment will be aligned to risk and a dedicated PIA will assess impacts on protected characteristics within the communities and staff. Specialist

People Impact Assessment (PIA) Template

Page 388	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				vehicles do not include front line fire appliances (fire engines). This proposal will not impact on the response target within Surrey. This means there will not be an increase in the time it takes to initially response to emergency incidents. The impact remains neutral, supported by the CRP not evidencing a race link to any increase or decrease in fire risk or other risk covered by the CRMP.
	X			**3. Review current resources at Camberley Fire Station and consider relocation options within the boroughs of Spelthorne, Elmbridge and Runnymede.** The proposal to review resources in Camberley is a phase two proposal, the review will be undertaken at year two to three of the CRMP (2026-27) and at this time a dedicated PIA will be completed, assessing the impacts on protected characteristics within the communities and of our staff. If resources are reduced during the day this will may have a negative impact on age as a protected characteristics within a small number of borough and districts, however nighttime cover would

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				increase, potentially creating a positive impact. The review will highlight this in the dedicated PIA, alongside how consultation feedback has been reflected within it.
				Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working or work locations have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**4. We will develop a response model which responds to fluctuating risk and seasonal demand.** The proposal to develop a response model to respond to changing risk and seasonal demand will include a dedicated PIA, however as the response model will focus on additional resources any

People Impact Assessment (PIA) Template

Page 390	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				impacts are likely to remain neutral or have a positive impact, this will be assessed against all protected characteristics.
	X			**5. We have reviewed the weekend availability of our On-Call staff and its impact on risk within the CRP (Community Risk Profile) therefore we will match our resource availability to risk.** The CRP does evidence a link age to an increase in fire risk or other risk covered by the CRMP, however moving daytime weekend cover to during the night will have minimal impact due to on-call firefighters needing to get to the fire station to pick up the fire engine, which leads to a planned delay within the existing response model. Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**6. Review existing prevention, protection, and response arrangements in Haslemere to ensure the most appropriate allocation of resources.** The proposal to review existing prevention, protection and response arrangements in Haslemere will be undertaken at year two to three of the CRMP (2026-27) and at this time a dedicated PIA will be completed, assessing the impacts on protected characteristics within the communities and of our staff. This assessment will evaluate the effects of these safety measures on the protected characteristics of both the communities and staff involved. The provision of prevention, protection and response

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				services to the communities in Haslemere will remain in place and for this protected characteristic is likely to remain neutral. Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working or work locations have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**7. A further review of our On-call availability to ensure an appropriate level of provision throughout the week.**

People Impact Assessment (PIA) Template

	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
Protected Characteristic:	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				The CRP does link age to an increase in fire risk and other risk covered by the CRMP. A dedicated PIA will be completed, assessing the impacts on protected characteristics within the communities and of our staff. Any changes to staff ways of working will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. From early engagement changes to ways of working have been identified by staff as having a potential negative impact on due to family commitments and caring responsibilities.
	X			**8. We will implement 12-hour shifts on the current 2-2-4 rota pattern to align to risk and demand to increase capacity for prevention and protection activities.**

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
	Neutral Impact:	Positive Impact:	Negative Impact:	
				The proposal to implement 12 hour shifts more widely within the Service, does not have an impact on our communities. The impact is neutral, however for this protected characteristic and more broadly within our communities, this may lead to a positive impact due to an increase in the prevention and community safety activities undertaken. This will be accessed during the delivery of the CRMP to understand the impacts.

This proposal will change staff ways of working and will be assessed through a dedicated PIA. Feedback from the consultation on this proposal will be included in the dedicated PIA. Depending on personal circumstances, individuals may experience both positive and negative impacts. Initial feedback from early engagement has highlighted changes to ways of working having a potential negative impact on staff due to family commitments and caring responsibilities. |
| | X | | | **9. Working with our health partners to respond to those who are most vulnerable in Surrey.** |

People Impact Assessment (PIA) Template

Protected Characteristic:	What impact will the implementation of this proposal have on people who share characteristics protected by *The Equality Act 2010*? (See Completion notes):			
	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
				Increased community safety initiatives, working with our health partners and expanding the types of incidents the service responds to is likely to have a positive impact on some protected characteristics and more widely within our communities. This proposal spans across all three phases of the CRMP and Dedicated PIAs will be undertaken on changes to how we support our heath partners and any potential changes to our ways of workings.

People Impact Assessment (PIA) Template

What impact will the implementation of this proposal have on people who are impacted by and / or local factors that sit outside the Equality Act 2010 (non-legislative). Examples include social economic factors (i.e. poverty and or isolation), caring responsibility, unemployment, homelessness, urbanisation, rurality, health inequalities any other disadvantage. (See Completion notes)				
Identified impact non-legislative factor.	Neutral Impact:	Positive Impact:	Negative Impact:	Evidence of impact and if applicable, justification if determining proportionate means of achieving legitimate aims exists
Caring responsibilities			X	Through engagement activity with staff prior to consultation, staff have advised that any changes to ways of working could have potential negative impact on those with family commitments and caring responsibilities. Impacts of any proposals that change staff ways of working will be assessed through a dedicated PIA's.

Action Planning

Action Plan Owner:		Commencement date:		Sign off date:	
As a result of performing this analysis, what actions are proposed to remove or reduce any negative impact of adverse outcomes identified on people (employees, applicants, customers, members of the public etc) who share characteristics protected by *The Equality Act 2010 or are non-legislative characteristics?*					
Action Planning					
Identified Impact Protected Characteristic or local non-legislative factor	Recommended Actions		Responsible Lead	Completion Date	Review Date
Disability (page 16): Banstead Fire Station proposal **Age (page 45): Banstead Fire Station proposal**	**Continual prevention and protection programmes consisting of workshops, community drills and promoting safe and well visits will continue within the Banstead area with the aim of stopping emergencies from happening in the first place. This includes working with local residents, business owners, land owners and more.** **Introduce a targeted support program for older and vulnerable residents, offering regular safe and well visits, smoke alarm installation, and emergency response plans. This would help**		**Jon Simpson**	**2026 (moves to business as usual after implementation of change)**	**Annually as BAU.**

People Impact Assessment (PIA) Template

	protect vulnerable groups and reduce the need for emergency interventions, mitigating the impact of a reduced fire presence in the area. Full and thorough PIA's will be completed for individual areas of change with impacts and mitigations, with input from consultation responses.			
Marital status (page 36): Banstead Fire Station proposal **Caring responsibilities (page 51): Banstead Fire Station proposal, Camberley Fire Station proposal, Haslemere Fire Station proposal**	Engagement with staff to continue throughout implementation to decide upon shift patterns – regardless of whether a site in Whyteleafe is found or if the relocation to Godstone continues. A fair and transparent transfer process will also continue.	**Jon Simpson**	**October 2026**	**N/A**
Religion and Belief (Page 23): Banstead Fire Station	Reasonable accommodations can be explored, such as flexible scheduling, where operationally feasible, to allow employees to meet their religious commitments. We will explore potential mitigations for staff whose religious observance may be impacted by any new shift patterns. This could include flexible scheduling or shift swaps to accommodate collective worship and other religious commitments, provided that operational demands can still be met.			

People Impact Assessment (PIA) Template

Version control and ownership/approval

Version Control			
Version number	**Purpose/Change**	**Author**	**Date**
PIA Draft 1	Initial draft PIA developed	Rizwan Ahmed	2nd April, 2024
PIA Draft 2	Introduction updated	Bernie Beckett	14th April, 2024
PIA Draft 3	Data and Impacts updated	Sally Wilson	19th April, 2024
PIA Draft 4	Update following consultation	Dal Rai	15th November 2024

Approval		
Approved by	**Description and Signature**	**Date Approved**
PIA Owner	Elizabeth Lacey	Draft - to be approved post consultation
EDI Lead	Dalwinder Rai/Rizwan Ahmed	Draft - to be approved post consultation
Head of Service (CFO, ACFO)	Dan Quin	Draft - to be approved post consultation
Cabinet Member	Kevin Deanus	Draft – to be approved post consultation
Working Group	CRMP SLT	Draft – to be approved post consultation

This PIA was completed by CRMP Steering Group

People Impact Assessment (PIA) Template

Completion notes

DRAFT

People Impact Assessment (PIA) Template

	Completion Notes:	
Analysis Ratings:	The analysis rating is located at the top of the document so that if you have several impact assessments you will be able to determine priority impact status. To assure the analysis determines the rating, the rating should not be determined before the analysis has been completed. **Red:** As a result of performing this analysis, it is evident a risk of discrimination exists (direct, indirect, unintentional, or otherwise) to one or more of the nine groups of people who share *Protected Characteristics (and / or local non-legislative factors)*. In this instance, **it is recommended that the use of the activity or policy be suspended** until further work or analysis is performed. If it is considered this risk of discrimination (is *objectively justified*, and/or the use of this proposal (policy, activity, function) is a *proportionate means of achieving a legitimate aim*; this should be indicated, and further professional advice taken. **Amber:** As a result of performing this analysis, it is evident a risk of discrimination (as described above) exists, and this risk may be removed or reduced by implementing the actions detailed within the *Action Planning* section of this document. **Green:** As a result of performing this analysis, no **adverse effects** on people who share Protected Characteristics *and / or local non-legislative factors* are identified - no further actions are recommended at this stage.	
Equality Data:	Equality data is internal or external information that may indicate how the activity or policy being analysed can affect diverse groups of people who share the nine Protected Characteristics *and / or local non-legislative factors*. Examples of *Equality Data* include: (this list is not definitive) 1: Application success rates by *Equality Groups* 2: Complaints by *Equality Groups* 3: Service usage and withdrawal of services by *Equality Groups* 4: Grievances or decisions upheld and dismissed by *Equality Groups*	
Legal Status:	This document is designed to assist organisations in *"Identifying and eliminating unlawful Discrimination, Harassment and Victimisation"* as required by *The Equality Act Public Sector Duty 2011*. SFRS is keen to extend "due regard" to local/non-legislative factors such as social economic factors (i.e. poverty and or isolation), caring responsibility, unemployment, homelessness, urbanisation, rurality, health inequalities any other disadvantage. ✓ (See Completion notes). **What impact will the implementation of this proposal have on people for which there is no legal requirement**? (Consider each local non-legislative factor separately). Doing this analysis may also identify opportunities to *foster good relations* and *advance opportunity* between those who share Protected Characteristics *and / or local non-legislative factors* and those that do not. *A PIA is not legally binding and should not be used as a substitute for legal or other professional advice.*	
Objective And/or Proportionate	Certain discrimination may be capable of being defensible if the determining reason is: (i) *objectively justified* *(ii) a proportionate means of achieving a legitimate aim* of the organisation For *objective justification*, the determining reason must be a real, objective consideration, and not in itself discriminatory. To be *'proportionate'* there must be no alternative measures available that would meet the aim without too much difficulty that would avoid such a discriminatory effect. Where (i) and/or (ii) is identified it is recommended that professional (legal) advice is sought prior to completing a People Impact Analysis.	

9

SURREY COUNTY COUNCIL

CABINET

DATE:	**28 JANUARY 2025**
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:	**ADMISSION ARRANGEMENTS FOR SURREY'S COMMUNITY AND VOLUNTARY CONTROLLED SCHOOLS FOR SEPTEMBER 2026 AND SURREY'S RELEVANT AREA**
ORGANISATION STRATEGY PRIORITY AREA:	**NO ONE LEFT BEHIND**

Purpose of the Report:

The purpose of this report is to ask Cabinet to make recommendations to Full Council on the admission arrangements that will apply for Surrey's community and voluntary controlled infant, junior, primary and secondary schools for admission in September 2026, as well as a determination on Surrey's Relevant Area.

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. The admission arrangements for each school determine which children will receive priority for a place.

Surrey County Council is responsible for setting the admission arrangements for 68 community and voluntary controlled schools for 2026. The remaining schools are academies, foundation, free, trust and voluntary aided schools and these are responsible for setting their own admission arrangements. As such admission arrangements for these schools are not covered in this report.

The local authority is also required by law to define the Relevant Area, within which admission authorities must consult with other schools on their admission arrangements.

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 children are offered a place at a preference school.

Recommendations:

It is recommended that Cabinet make the following recommendations to Full Council:

Recommendation 1

That the Published Admission Number (PAN) for Year 3 at Reigate Priory is reduced from 150 to 120 for 2026 admission, as set out in Appendix 1 of Annex 1.

Reasons for Recommendation

- It is supported by the Headteacher and Governing Body of the school
- It is supported by Surrey's Education Place Planning team
- There will still be sufficient places for local children if the PAN is decreased
- It will help the school maintain financial viability as they will be able to operate with just four classes
- It will have no impact on children who are currently on roll at the school
- The decision is not related to the future provision of places in Reigate

Recommendation 2

That a Published Admission Number (PAN) is not introduced for admission to Year 3 at Audley Primary School for 2026 admission.

Reasons for Recommendation

- There are spaces at other schools in the area which negates the need to introduce a Year 3 PAN at Audley Primary School
- Although a small number, the introduction of a Year 3 PAN of 2 at Audley Primary School could have a detrimental impact on other schools in the area
- It will have no impact on children who are currently on roll at the school

Recommendation 3

That the Published Admissions Number (PAN) for Reception at Earlswood Infant School is reduced from 120 to 90 for 2026 admission, as set out in Appendix 1 of Annex 1.

Reasons for Recommendation

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

Recommendation 4

That the Published Admission Numbers (PANs) for September 2026 for all other community and voluntary controlled schools (excluding Year 3 at Reigate Priory and Reception at Earlswood Infant School, which are covered by Recommendations 1 and 3) are determined as they are set out in Appendix 1 of Annex 1.

Reasons for Recommendation

- Most other PANs remain as they were determined for 2025 which enables parents to have some historical benchmark by which to make informed decisions about their school preferences for 2026 admission
- The PANs provide for the sufficiency of places at community and voluntary controlled schools
- The Education Place Planning team supports the PANs
- Each community and voluntary controlled school were given the opportunity to comment on the proposed PAN if they wished

Recommendation 5

That all other aspects of Surrey's admission arrangements for community and voluntary controlled schools for September 2026, for which no change has been consulted on, are agreed as set out in Annex 1 and its appendices.

Reasons for Recommendation

- The local authority has a duty to determine the admission arrangements for 2026 for all community and voluntary controlled schools by 28 February 2025
- The admission arrangements are working well
- The arrangements enable the majority of pupils to attend a local school and in doing so reduce travel and support Surrey's sustainability policies
- The arrangements are compliant with the School Admissions Code
- Section 20 of Annex 1 has been amended to remove reference to an offer of a place being withdrawn 'even if the child has already started at the school'. This is because registered pupils may only be removed from roll in the limited circumstances set out in regulation 9 of the School Attendance (Pupil Registration) (England) Regulations 2024, as amended.
- Section 21 of Annex 1 has been updated to include the following wording in relation to travel assistance, which ensures it reflects the recent changes to Surrey's travel assistance policy:

  'To be considered for travel assistance to a school that is not your nearest, you will normally be required to demonstrate that you have applied for and been refused a place at any nearer schools....'.

Recommendation 6

That Surrey's Relevant Area is agreed as set out in Annex 4.

Reasons for Recommendation

- The local authority is required by law to define the Relevant Area, within which admission authorities must consult with other schools on their admission arrangements
- The Relevant Area must be consulted upon and agreed every two years even if no changes are proposed
- Setting a Relevant Area ensures that any schools who might be affected by changes to the admission arrangements for other local schools will be made aware of those changes
- No change has been made to Surrey's Relevant Area since it was last determined in February 2023

Executive Summary:

1. The local authority has a duty to determine the admission arrangements for all 68 community and voluntary controlled schools by 28 February 2025, having regard to the outcome of any consultation.

2. The remaining schools are academies, foundation, free, trust and voluntary aided schools. As these are responsible for setting their own admission arrangements, these schools are not covered by this report.

3. The proposed admission arrangements, including the proposed Published Admission Numbers (PANs) are set out in Annex 1 and its appendices.

Reigate Priory – Reduction of Year 3 PAN from 150 to 120

4. The reasons for reducing the Year 3 PAN at Reigate Priory are set out in Section 1 of Annex 2.

5. There was just one response to the consultation, from a member of the public. They were opposed to the proposal but declared that they would not be affected by it. Their reason for opposing the proposal was because of concern about new houses in the area and VAT on independent school fees, which could both lead to an increased need for more school places.

6. Place planning already takes into account the projected yield from new housing and current forecasts project a surplus of school places in the Reigate planning area. However, in the scenario that more places were unexpectedly needed in an area, admission authorities could choose to admit over PAN, without consultation, and the local authority would explore this with schools if that need arose.

7. The Headteacher and Governing Body support the change.

8. This change is reflected in Appendix 1 of Annex 1.

Audley Primary School - Introduction of a Year 3 PAN of 2

9. The reasons for introducing a Year 3 PAN at Audley Primary School are set out in Section 2 of Annex 2.

10. The number of responses to the consultation was low, with two respondents opposed to this proposal. One respondent was a Headteacher and one was a Governor, both from another local primary school.

11. The reason the respondents opposed the proposal was because they felt that it would be likely to impact admission numbers at other local schools, at a time when the local authority is indicating a fall in birth rate. In this way, both respondents felt that the proposal would negatively affect pupil admission numbers to their school, as well as others in the local area, potentially rendering them non-viable.

12. Audley Primary School has historically admitted two additional children into Year 3 and is currently operating at 32 in each of their year groups in KS2. However,

in reviewing the numbers on roll at schools in the local area, the local authority acknowledges that these additional places are not needed.

13. In addition, albeit the PAN that was proposed was small, the local authority recognises the potential impact that introducing a Year 3 PAN at Audley Primary School could have on other schools in the area, especially those with vacancies, by further reducing their number on roll.

14. As a result, the local authority is not recommending the implementation of this proposal.

Earlswood Infant School – Reduction of Reception PAN from 120 to 90

15. The reasons for reducing the Year 3 PAN at Earlswood Infant School are set out in Annex 3.

16. The number of responses to the consultation was low, with 2 respondents in support and 2 opposed.

17. The proposal was supported by the local parish council, and by a headteacher at a Surrey primary school. Both recognised the declining birth rate and commented on the challenges that this gives in ensuring the sustainability of schools.

18. Those opposed were a prospective parent worried about a reduction in parental choice and a council officer who queried if remaining capacity at the school could be repurposed to accommodate children with additional needs and disabilities.

19. The Education Place Planning team support the proposed reduction in PAN and are satisfied that the number of school places provided by the PANs of all schools in the area are adequate to meet the level of pupil demand to ensure that all children can be offered a school place.

20. The headteacher and governing body support the change.

21. This change is reflected in Appendix 1 of Annex 1.

Recommendation 4 - Proposed PANs for other community and voluntary controlled schools

22. Appendix 1 to Annex 1 sets out the proposed admission numbers for all community and voluntary controlled schools for 2026 admission, with changes highlighted in bold.

23. The reduction in Year 3 PAN at Reigate Priory and the reduction in Reception PAN at Earlswood Infant School have already been referenced in Recommendations 1 and 3.

24. It is proposed that the PAN for all other community and voluntary controlled schools for 2026 will remain as determined for 2025. This will enable parents to have some historical benchmark by which to make informed decisions about their school preferences.

25. The Education Place Planning team support the proposed PANs.

26. Each community and voluntary controlled school was given the opportunity to comment on the proposed PAN if they wished.

Recommendation 5 – Admission arrangements for which no change has been consulted on

27. The local authority has a duty to determine the admission arrangements for 2026 for all community and voluntary controlled schools by 28 February 2025, even if there are no changes proposed.

28. Other than changes already referenced in Recommendations 1 and 3, the only other changes are points of clarification as follows:

- Section 20 of Annex 1 has been amended to remove reference to an offer of a place being withdrawn 'even if the child has already started at the school'. This is because registered pupils may only be removed from roll in the limited circumstances set out in regulation 9 of the School Attendance (Pupil Registration) (England) Regulations 2024, as amended.
- Section 21 of Annex 1 has been updated to include the following wording in relation to travel assistance, which ensures it reflects the recent changes to Surrey's travel assistance policy:
  - 'To be considered for travel assistance to a school that is not your nearest, you will normally be required to demonstrate that you have applied for and been refused a place at any nearer schools….'.

29. The admission arrangements for Surrey's community and voluntary controlled schools are generally working well. This is demonstrated by the fact that, in 2024, on average, 86.6% of applicants for a place in Reception or Year 7 were offered a place at their first preference school and 97.4% were offered a place at one of their preference schools.

30. The admission arrangements enable the majority of pupils to attend a local school and in doing so this reduces the need for travel and supports Surrey's sustainability policies.

31. If a community or voluntary controlled school converts to academy status after submission of this report but before the arrangements have been determined by Full Council, the determination decision will become the responsibility of the school or Trust, as admission authority for the school.

32. **Recommendation 6 – Surrey's Relevant Area**

33. The Relevant Area that Surrey intends to publish for schools for the next two years is set out in Annex 4.

34. The Relevant Area is the area in which admission authorities must consult with other schools regarding their proposed admission arrangements, before determining them.

35. The School Standards & Framework Act 1998 requires local authorities to establish Relevant Area(s) for admission policy consultations.

36. The Education (Relevant Areas for Consultation on Admission Arrangements) Regulations 1999 requires the local authority to review and consult on its relevant area every 2 years, and thereafter to determine if any changes are required.

37. The Relevant Area has no bearing on the admission criteria that will be used to determine the order of priority for each individual school.

38. The proposed Relevant Area for 2025 remains as it was determined in 2023.

Consultation:

39. The School Admissions (Admission Arrangements and Coordination of Admission Arrangements) (England) Regulations 2014 require all admission authorities to consult on their admission arrangements every seven years, unless they are proposing any changes to their arrangements, in which case they must consult each year they are proposing a change.

40. Consultation on the admission arrangements for 2026 must take place for a minimum of six weeks, between 1 October 2024 and 31 January 2025.

41. On 9 July 2024, all community and voluntary controlled schools were emailed details of the Published Admission Number (PAN) that the local authority intended to propose for 2026 admission. Schools were asked to respond if they did not agree with the PAN that was to be proposed.

42. On 24 September 2024, the Cabinet Member for Children, Families and Lifelong Learning agreed to consult on a reduction in PAN at Reigate Priory, from 150 to 120, and the introduction of a Year 3 PAN of 2 at Audley Primary School.

43. A consultation on these changes, along with the admission arrangements for which no change was proposed, was published on Surrey Says on 2 October 2024 and ran for six weeks until 13 November 2024.

44. The document setting out a summary of this consultation, which was made available to all consultees, is attached at Annex 2.

45. On 4 November, after publication of the initial consultation, the Cabinet Member for Children, Families and Lifelong Learning subsequently agreed to consult on reducing the PAN at Earlswood Infant School, from 120 to 90.

46. A consultation on the change for Earlswood Infant School was published on Surrey Says on 5 November 2024 and ran for six weeks until 17 December 2024.

47. The document setting out a summary of the consultation for Earlswood Infant School, which was made available to all consultees, is attached at Annex 3.

48. Details of both consultations were shared with Surrey schools through Surrey's Schools Bulletin and with all Early Years providers through the Early Years Bulletin. It was also sent by direct email to Diocesan Boards of Education, neighbouring local authorities, Surrey County Councillors, Borough and District Councillors, Parish and Town Councillors and Surrey MPs.

49. Surrey County Councillors, Borough and District Councillors, and Parish and Town Councils were asked to draw the consultation to the attention of any local community or resident group, to ensure it reached the widest possible group.

50. Schools were also sent a flyer which they were encouraged to make available to parents of children attending the school.

51. Full details of the proposed admission arrangements for Surrey's community and voluntary controlled schools, including the arrangements for which there is no change proposed, are attached as Annex 1 and its appendices.

52. In total, 3 respondents submitted a response to the consultation in relation to Reigate Priory and Audley Primary School.

53. A further 4 respondents submitted a response to the consultation in relation to Earlswood Infant School.

54. A summary of the responses to the individual school related questions within the consultation is set out below in Table A.

55. In relation to Surrey's Relevant Area, the local authority consulted with all Surrey schools through the Schools Bulletin, Diocesan Boards and neighbouring local authorities but no comments were received. This is to be expected as the Relevant Area is very much an operational document for schools and the local authority in relation to consultation and does not influence how places are allocated.

Table A - Summary of responses to admission consultation

Question Number	Proposal	Document	Agree	Disagree	No Opinion
1	Reigate Priory - reduction of Year 3 PAN from 150 to 120	Annex 1, Appendix 1	0	1	2
2	Audley School – introduction of Year 3 PAN of 2	Annex 1, Appendix 1	0	2	1
3	Earlswood Infant School – reduction of Reception PAN from 120 to 90	Annex 1, Appendix 1	2	2	0

Risk Management and Implications:

56. The risks of implementing these arrangements are low. However, any parents who feel unfairly disadvantaged by the arrangements or believes that they do not comply with admissions law or the School Admissions Code, can object to the Office of the Schools Adjudicator by 15 May 2025.

Financial and Value for Money Implications:

57. The admission criteria for the majority of community and voluntary controlled schools in Surrey conform to Surrey's standard criteria. The more schools that have the same admission criteria, the more the processes can be streamlined and thus present better value for money. However, where required, the

admission criteria for some schools vary from Surrey's standard but these can currently be managed within existing resources.

58. Normally schools are funded for the year based on the number of pupils on roll on previous October census date. However, where a school has reduced PAN there is often a planned reduction in the number of pupils and, where there is such a reduction, in previous years the Council has applied for a disapplication from the Secretary of State to reduce funding in year to reflect that planned reduction. No such reductions were made in 2023/24 or 2024/25 and none are proposed for 2025/26. The council will consider its policy on this issue for future years in due course in consultation with schools forum and those schools affected. If there was an overall shortfall of places in the area in September 2026 the council would have to fund additional places from the Dedicated Schools Grant growth fund allocation. However, current estimates suggest that that will not be necessary.

Section 151 Officer Commentary:

59. Significant progress has been made in recent years to improve the Council's financial resilience and the financial management capabilities across the organisation. Whilst this has built a stronger financial base from which to deliver our services, the increased cost of living, global financial uncertainty, high inflation 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 be forward looking in the medium term, as well as the delivery of the efficiencies to achieve a balanced budget position each year.

60. 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.

61. In this context the Section 151 Officer recognises the importance of a clear and compliant admissions policy. Funding for schools is allocated through the annual funding formula approved by Cabinet, the cost of which is contained within the Dedicated Schools Grant, as such the S151 supports the recommendations of this report.

Legal Implications – Monitoring Officer:

62. The admission arrangements comply with legislation on school admissions and the School Admissions Code.

63. The local authority has carried out a consultation on the changes for Reigate Priory and Audley Primary School between 2 October and 13 November 2024, and for Earlswood Infant School between 5 November and 17 December 2024. Both consultations were for a period of 6 weeks, which is in accordance with statutory requirements.

64. There is a statutory requirement for consultation in this context as set out in The School Admissions (Admission Arrangements and Co-ordination of Admission Arrangements) (England) Regulations 2012. Such consultation involved those directly affected by the changes together with relevant representative groups. The material presented to consultees provided sufficient information to allow for intelligent consideration and response in relation to the proposals and was presented in a way that consultees could understand.

65. The best value duty is contained in s3 of the Local Government Act 1999 as a result of which the Council is under a duty to make arrangements to secure continuous improvement in the way in which functions are exercised, having regard to a combination of economy, efficiency and effectiveness. The relevant guidance states that Councils should consider overall value, including economic, environmental and social value when reviewing service provision.

Equalities and Diversity:

66. The Equalities Impact Assessment has been completed in full and is attached in Annex 5. The adoption of determined admission criteria is a mandatory requirement supported by primary legislation. The policy relating to community and voluntary controlled schools does not discriminate according to age, gender, ethnicity, faith, disability or sexual orientation.

67. Measures have been taken to reference vulnerable groups both in terms of exceptional arrangements within admissions, the SEND process and the in-year fair access protocol. In addition, a right of appeal exists for all applicants who are refused a school place.

Other Implications:

68. 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	Set out below
Safeguarding responsibilities for vulnerable children and adults	Set out below
Environmental sustainability	Set out below
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

Corporate Parenting/Looked After Children implications:

69. As required by the School Admissions Code, the proposed admission arrangements give top priority to children who are Looked After by a local

authority; children who have left care through adoption, a child arrangements order or a special guardianship order; and children who have been adopted from state care outside England.

Safeguarding responsibilities for vulnerable children and adults implications:

70. The efficient and timely administration of the school admission process, 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.

Environmental Sustainability implications:

71. The County Council attaches great importance to being environmentally aware and wishes to show leadership in cutting carbon emissions and tackling climate change.

72. Since 2017 the County Council's Safer Travel Team have promoted a new national online system called Modeshift STARS www.modeshiftstars.org. This system is supported by the Department for Transport. The Modeshift STARS website provides materials for schools to create a School Travel Plan. A school can choose a number of interventions such as Bikeability cycle training and the Golden Boot Challenge to help achieve their accreditation. Successful implementation of School Travel Plans will lead to improvements in road safety and more sustainable travel on school journeys. This will reduce congestion, improve air quality, and active travel will improve the health of children.

73. The admission arrangements will still enable the majority of pupils to attend a local school and so reduce travel and support policies on cutting carbon emissions and tackling climate change.

74. Children will continue to be considered for travel assistance in line with Surrey's Home to School/College Travel and Transport policy and information on this is provided to parents in Section 21 of Annex 1.

What Happens Next:

- The September 2026 admissions arrangements as agreed by the Cabinet will be ratified by the full County Council on 4 February 2025.
- The determined admission arrangements will be published on Surrey's website by 15 March 2025 and all consultees will be notified.
- All Surrey schools will also be notified of the determined admission arrangements in the School Admissions termly newsletter, issued as part of the Schools Bulletin at the start of the Summer Term 2025.
- The arrangements will be published in the primary and secondary admissions booklets in August 2025, which will be made available to parents online and in hard copy by request in September 2025.
- The information on school admissions will be circulated to the Contact Centre, Surrey County Council Libraries and Early Years.
- Full information on school admissions for 2026 entry will also be published on Surrey County Council's website in September 2025.

10

Report Author:

Claire Potier: Service Manager School Admissions - claire.potier@surreycc.gov.uk

Consulted:

- Amanda Scally - Principal Solicitor – Adults, Education, Litigation & Employment
- Nikki Parsons - Deputy Strategic Finance Business Partner – Education & Lifelong Learning
- Schools affected by the proposals
- Julia Katherine - Director of Education and Lifelong Learning
- Trudy Pyatt - Assistant Director for Education, Access, Quality and Inclusion
- Mike Singleton/Sarah Jeffery - Service Managers for Education Place Planning
- Headteachers, Chairs of Governors, Parent Governors of all Surrey schools
- Early Years establishments in Surrey
- Diocesan Boards of Education
- Neighbouring local authorities
- Surrey County Councillors
- Parish Councils
- Local MPs
- General public consultation - via Surrey Says

Annexes:

Annex 1	Admission arrangements for community & voluntary controlled schools
• **Appendix 1**	Published Admission Numbers (PANs)
• **Appendix 2**	Schools which will operate shared sibling priority
• **Appendix 3**	Catchment map for Southfield Park Primary
• **Appendix 4**	Catchment map for Stamford Green Primary
• **Appendix 5**	Catchment map for Walton on the Hill Primary
• **Appendix 6**	Supplementary Form for social/medical applicants
• **Appendix 7**	Supplementary Form for staff applicants
Annex 2	Consultation document for Reigate Priory and Audley Primary
Annex 3	Consultation document for Earlswood Infant
Annex 4	Relevant Area
Annex 5	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 (Relevant Areas for Consultation on Admission Arrangements) Regulations 1999
- School Admissions Code 2021
- Equality Act 2002

10

Admission Arrangements 2026/27 - Surrey County Council's community and voluntary controlled schools

SURREY
COUNTY COUNCIL

Contents

10

Admission arrangements for Surrey County Council's community and voluntary controlled schools 2026/27

This document sets out Surrey County Council's admission arrangements for community and voluntary controlled schools in 2026/27.

1. Published Admission Numbers

The Published Admission Numbers for initial entry to Surrey's community and voluntary controlled schools in September 2026 are set out in Appendix 1.

2. Coordinated Schemes

Applications will be managed in accordance with Surrey's coordinated schemes on primary and secondary admission. Please see Surrey's coordinated schemes for further details regarding applications, processing, offers, late applications, post-offer and waiting lists.

3. Applications for Reception and Year 3

Applications for Reception and applications for a Year 3 place at schools which have a published admission number for Year 3, must be made by 15 January 2026. Places at Surrey schools will be offered on the basis of the preferences that are shown on the application form. Applicants will be asked to rank up to four Reception or Year 3 preferences and these will be considered under an equal preference system.

4. Applications for a secondary school place

Applications for a Secondary school place must be made by 31 October 2025. Places at Surrey secondary schools will be offered on the basis of the preferences that are shown on the application form. Applicants will be asked to rank up to six preferences and these will be considered under an equal preference system.

5. Children with an Education, Health and Care Plan (EHCP)

Children with an EHCP that names a school will be allocated a place before other children are considered. In this way, the number of places available will be reduced by the number of children with an EHCP that has named the school.

6. Admission arrangements for 2026/27

For the majority of Surrey's community and voluntary controlled schools the admission arrangements are set out in section 7 below. Where there are local variations, these are set out by area and by school in section 8.

7. Admission criteria for 2026/27

Other than for schools listed in section 8, when a community or voluntary controlled school is over-subscribed for any year group, applications for entry in 2026/27 will be ranked in the following order:

First criterion: Looked after and previously looked after children

See section 9 for information relating to looked after and previously looked after children.

Second criterion: Exceptional social/medical need

See section 10 for information relating to exceptional social/medical need. A supplementary information form (Appendix 6) should be completed and returned by the application closing date for all applicants wishing to apply under this criterion.

Third criterion: Children of a member of staff

See section 11 for information relating to children of a member of staff. A supplementary information form (Appendix 7) should be completed and returned by the application closing date for all applicants wishing to apply under this criterion.

Fourth criterion: Children who are expected to have a sibling at the school or at an infant/ junior school which will operate shared sibling priority for admission at the time of the child's admission

See Appendix 2 for infant/junior schools that will operate shared sibling priority for admission for the purpose of this criterion. See section 12 for information relating to siblings.

Fifth criterion: Any other children

Remaining places will be offered on the basis of nearness to the school measured in a straight line from the address point of the child's home address, as set by Ordnance Survey to the nearest official school gate for pupils to use. See section 13 for information on the definition of home address. See section 14 for information on tie breakers.

8. School specific admission criteria for 2026/27

When a school named below is over-subscribed for any year group, applications for entry in 2026/27 will be ranked in criteria order.

In considering local admission arrangements, see sections 9 to 14 for more information on:
- Looked after and previously looked after children
- Exceptional social/medical need
- Children of a member of staff
- Siblings
- Home address
- Tie breakers

a) Epsom & Ewell

Southfield Park Primary School:

1. Looked after and previously looked after children
2. Exceptional social/medical need
3. Children of a member of staff
4. Siblings
5. Children living in the defined catchment area of the school (see Appendix 3 for catchment map)
6. Any other children

Stamford Green Primary School:

1. Looked after and previously looked after children
2. Exceptional social/medical need
3. Children of a member of staff

10

4. Siblings
5. Children living in the defined catchment area of the school (see Appendix 4 for catchment map)
6. Any other children

Wallace Fields Junior School:

1. Looked after and previously looked after children
2. Exceptional social/medical need
3. Children of a member of staff
4. Children who will have a sibling at Wallace Fields Infant School or Wallace Fields Junior School on the date of their admission
5. *Children attending Wallace Fields Infant School
6. Any other children

* Criterion 5 will only apply to children who attend Wallace Fields Infant School in Year 2 and will not be applied once a child has left this school

If the number of children who qualify under any criterion is greater than the number of places remaining available at the school, any remaining places will be offered to children who meet the criterion on the basis of proximity of the child's home address to the nearest official school gate at either Wallace Fields Infant School or Wallace Fields Junior School, with children living nearest receiving the greater priority.

10

b) Guildford

Worplesdon Primary School at 7+:

1. Looked after and previously looked after children
2. Exceptional social/medical need
3. Children of a member of staff
4. Siblings
5. *Children attending Wood Street Infant School
6. Any other children

* Criterion 5 will only apply to children who attend Wood Street Infant School in Year 2 and will not be applied once a child has left this school

c) Reigate & Banstead

Banstead Community Junior School:

1. Looked after and previously looked after children
2. Exceptional social/medical need
3. Children of a member of staff
4. *Children attending Banstead Infant School
5. Siblings
6. Any other children

* Criterion 4 will only apply to children who attend Banstead Infant School in Year 2 and will not be applied once a child has left this school

Earlswood Junior School:

1. Looked after and previously looked after children
2. Exceptional social/medical need
3. Children of a member of staff
4. *Children attending Earlswood Infant School

5. Siblings
6. Any other children

* Criterion 4 will only apply to children who attend Earlswood Infant School in Year 2 and will not be applied once a child has left this school

Meath Green Junior:

1. Looked after and previously looked after children
2. Exceptional social/medical need
3. Children of a member of staff
4. *Children attending Meath Green Infant School
5. Siblings
6. Any other children

* Criterion 4 will only apply to children who attend Meath Green Infant School in Year 2 and will not be applied once a child has left this school

Reigate Priory School:

1. Looked after and previously looked after children
2. Exceptional social/medical need
3. Children of a member of staff
4. Siblings
5. *Children attending Dovers Green Infant or Holmesdale Community Infant schools
6. Any other children

* Criterion 5 will only apply to children who attend Dovers Green Infant or Holmesdale Community Infant schools in Year 2 and will not be applied once a child has left these schools

If the number of children who qualify under any criterion is greater than the number of places remaining available at the school, any remaining places will be offered to children who meet the criterion on the basis of proximity of the child's home address to the front door of the Reigate Priory building in Priory Park, Reigate, with children living nearest receiving the greater priority.

Walton on the Hill Primary School:

1. Looked after and previously looked after children
2. Exceptional social/medical need
3. Children of a member of staff
4. Siblings
5. Children living in the defined catchment area of the school (see Appendix 5 for catchment map)
6. Any other children

d) Runnymede

St Ann's Heath Junior School:

1. Looked after and previously looked after children
2. Exceptional social/medical need
3. Children of a member of staff
4. Siblings
5. *Children attending Trumps Green Infant School
6. Any other children

* Criterion 5 will only apply to children who attend Trumps Green Infant School in Year 2 and will not be applied once a child has left this school

e) Spelthorne

Chennestone Primary Community School at 7+:

1. Looked after and previously looked after children
2. Exceptional social/medical need
3. Children of a member of staff
4. Siblings
5. *Children attending Beauclerc Infant School
6. Any other children

* Criterion 5 will only apply to children who attend Beauclerc Infant School in Year 2 and will not be applied once a child has left this school

f) Waverley

Shottermill Junior School:

1. Looked after and previously looked after children
2. Exceptional social/medical need
3. Children of a member of staff
4. *Children attending Shottermill Infant School
5. Siblings
6. Any other children

* Criterion 4 will only apply to children who attend Shottermill Infant School in Year 2 and will not be applied once a child has left this school

William Cobbett Primary School at 7+:

1. Looked after and previously looked after children
2. Exceptional social/medical need
3. Children of a member of staff
4. Siblings
5. *Children attending Badshot Lea Village Infant or Folly Hill Infant schools
6. Any other children

* Criterion 5 will only apply to children who attend Badshot Lea Village Infant or Folly Hill Infant schools in Year 2 and will not be applied once a child has left these schools

g) Woking

West Byfleet Junior School:

1. Looked after and previously looked after children
2. Exceptional social/medical need
3. Children of a member of staff
4. *Children attending West Byfleet Infant School
5. Siblings
6. Any other children

* Criterion 4 will only apply to children who attend West Byfleet Infant School in Year 2 and will not be applied once a child has left this school

10

9. Looked after and previously looked after children

Within the admission arrangements for all community and voluntary controlled schools, looked after and previously looked after children will receive the top priority for a place. Looked after and previously looked after children will be considered to be:

- children who are in the care of a local authority or provided with accommodation by a local authority in accordance with Section 22 of the Children Act 1989, e.g. fostered or living in a children's home, at the time an application for a school is made; and
- children who have previously been in the care of a local authority or provided with accommodation by a local authority in accordance with Section 22 of the Children Act 1989 and who have left that care through adoption, a child arrangements order (in accordance with Section 8 of the Children Act 1989 and as amended by the Children and Families Act 2014) or special guardianship order (in accordance with Section 14A of the Children Act 1989).
- children who appear (to the local authority) to have been in state care outside of England and ceased to be in state care as a result of being adopted. A child will be regarded as having been in state care outside of England if they were accommodated by a public authority, a religious organisation or any other provider of care whose sole purpose is to benefit society. The parent/carer will need to provide evidence to demonstrate that the child was in state care outside of England and left that care as a result of being adopted

Places will be allocated under this criterion when places are first offered at a school and the local authority may also ask schools to admit over their published admission number at other times under this criterion.

10. Exceptional social/medical need

Occasionally there will be a very small number of children for whom exceptional social or medical circumstances apply which will warrant a placement at a particular school. The exceptional social or medical circumstances might relate to either the child or the parent/carer.

A supplementary information form (Appendix 6) should be completed and returned by the application closing date for all applicants wishing to apply under this criterion.

Supporting evidence from a professional is also required such as a doctor and/or consultant for medical cases or a social worker, health professional, housing officer, the police or probation officer for other social circumstances. This evidence must confirm the circumstances of the case and must set out why the child should attend a particular school and why no other school could meet the child's needs.

Providing evidence does not guarantee that a child will be given priority at a particular school and in each case a decision will be made based on the merits of the case and whether the evidence demonstrates that a placement should be made at one particular school above any other.

Common medical conditions and allergies can usually be supported in all mainstream schools, therefore priority under a school's exceptional medical criterion would not normally be given for these. Some mainstream schools have units attached which provide specialist provision for children with an education, health and care plan which names the school. The facilities in these units are not normally available to children in the mainstream school and as such priority under a school's exceptional social or medical criterion would not normally be agreed for a mainstream place on the basis of a specialist unit being attached to the school.

In addition, routine child minding arrangements would not normally be considered to be an exceptional social reason for placement at a particular school.

Places may be allocated under this criterion when places are first offered at a school and the local authority may also ask schools to admit over their published admission number at other times under this criterion.

11. Children of a member of staff

Priority will be given to a child if their parent is a permanent member of staff at the school and meets either or both of the following circumstances:

a)   the member of staff has been employed at the school for two or more years at the time at which the application for admission to the school is made, on a full or part time basis; and/or

b)   the member of staff is recruited to fill a vacant post for which there is a demonstrable skill shortage.

A person will be considered to be a child's parent for the purpose of this criterion if they are living in the same family unit as the child at the same address and are:

- their mother or father:
- any other person who has parental responsibility, such as an adoptive parent, step-parent, a special guardian or person named in a child arrangements order
- any other person who does not have parental responsibility but otherwise has the care of the child, such as a foster carer.

A supplementary information form (Appendix 7) should be completed and returned by the application closing date for all applicants wishing to apply under this criterion.

For applications made as part of a normal intake, the length of employment will be considered as of the closing date for applications. For in year applications and for the purpose of maintaining a waiting list, the length of employment will be considered as of the date the application is received or the date a place becomes available, if a place is considered from the waiting list.

12. Siblings for community and voluntary controlled schools

A sibling will be considered to be a brother or sister (that is, another child of the same parents, whether living at the same address or not), a half-brother or half-sister or a step-brother or step-sister or an adoptive or foster sibling, ordinarily living as part of the same family unit at the same address.

A child will be given sibling priority if they have a sibling on roll at the school concerned or a linked school and that sibling is still expected to be on roll at that school at the time of the child's admission. A child will not be eligible for sibling priority if their sibling is attending or due to attend a nursery that is attached to the school.

If a sibling leaves the school concerned or a linked school after the application but before the national offer day, the applicant must let the School Admissions team know as this may affect the child's sibling priority. We reserve the right to withdraw an offer of a place that has been made on the basis of sibling priority if information comes to light that the applicant had claimed that priority in the knowledge that the child's sibling would have left the school or linked school by the time of the child's admission; or if the applicant failed to tell us of a change that took place prior to the national offer day that would affect the child's sibling priority.

For the initial intake to an infant/junior school, a child will also be given sibling priority for admission if their sibling is attending an infant/junior school which operates shared sibling priority with the school and that sibling is still expected to be on roll at either school at the time of the child's admission. See Appendix 2 for community and voluntary controlled schools that will operate shared sibling priority for admission in 2026 for the purpose of the sibling criterion. This will apply both at the initial allocation of places and also when prioritising the waiting list. Giving sibling priority has the effect of maximising the opportunity for children in the same family to be educated at the same school or at a school which operates shared sibling priority.

At the initial allocation, when an applicant is applying for a Reception place at an infant school that has both a feeder and sibling link to a junior school and the child has a sibling currently attending Year 2 of the infant school but who will have left by the time the younger child starts, the younger child will be considered under the sibling criterion as part of the initial allocation. This is because, due to the feeder link, they will be expected to still have a sibling at the linked junior school at the time of admission. The schools for which this will apply are as follows:

- Bagshot Infant and Connaught Junior (Academy)
- *Beauclerc Infant School and Chennestone Primary School
- Earlswood Infant and Earlswood Junior
- The Grange Community Infant and New Haw Community Junior (Academy)
- Meath Green Infant and Meath Green Junior
- Merrow CofE Infant and Merrow Junior (Foundation)
- Shottermill Infant and Shottermill Junior
- Trumps Green Infant and St Ann's Heath Junior
- West Byfleet Infant and West Byfleet Junior

* Shared sibling priority only applies to Beauclerc Infant School

At the initial allocation, when an applicant is applying for both a Reception place and a Year 3 place at a primary school which has an intake at Reception and Year 3, or at separate infant/junior schools which operate shared sibling priority, if a place can only be offered to one child, the waiting list position for the other child will be adjusted to reflect the fact that they are expected to have a sibling in the school or another school which operates shared sibling priority in September 2026.

A mainstream child will also be given sibling priority for a school if they have a sibling with a final EHCP that names the same school, as long as the sibling with the EHCP is expected to start at the school before or on the same date as the mainstream child. Applicants will have to declare the details of any child whose EHCP names the school in order to be considered for sibling priority.

13. Home address

Within the admission arrangements for community and voluntary controlled schools, the child's home address excludes any business or childminder's address and must be the child's normal place of residence. It also excludes any relative's address unless the child lives at that address as their normal place of residence. Where the child is subject to a child arrangements order and that order stipulates that the child will live with one parent/carer more than the other, the address to be used will be the one where the child is expected to live for the majority of the time. For other children, the address to be used will be the

address where the child lives the majority of the time. In other cases, where the child spends an equal time between their parents/carers, it will be up to the parent/carers to agree which address to use. Where a child spends their time equally between their parents/carers and they cannot agree on who should make the application, we will accept an application from the parent/carer who is registered for child benefit. If neither parent/carer is registered for child benefit we will accept the application from the parent/carer whose address is registered with the child's current school or nursery.

We will not generally accept a temporary address if the main carer of the child still possesses or rents a property that has previously been used as a home address, nor will we accept a temporary address if we believe it has been used solely or mainly to obtain a school place when an alternative address is still available to that child. All distances will be measured by the computerised Geographical Information System maintained by Surrey's School Admissions team.

The address to be used for the initial allocation of places to Reception, Year 3 and Year 7 will be the child's address at the closing date for applications, which is 15 January 2026 for Reception and Year 3, and 31 October 2025 for Year 7. Changes of address may be considered in accordance with Surrey's coordinated scheme if there are exceptional reasons behind the change, such as if a family has just moved to the area. The address to be used for waiting lists, after the initial allocation, will be the child's current address. Any offer of a place on the basis of address is conditional upon the child living at the appropriate address on the relevant date. Applicants have a responsibility to notify Surrey County Council of any change of address.

14. Tie breaker and the admission of twins, triplets, other multiple births or siblings born in the same academic year

Unless stipulated otherwise, if within any criterion there are more children than places available, any remaining places will be offered to children who meet the criterion on the basis of proximity of the child's home address to the school, with children living nearest receiving the greater priority. Distance will be measured in a straight line from the address point of the child's home address, as set by Ordnance Survey, to the nearest official school gate for pupils to use. This is calculated using the School Admissions team's Geographical Information System.

Where two or more children share priority for a place, e.g. where two children live equidistant from a school, Surrey County Council will determine which child should be given priority by using a computer generated number that is assigned randomly to each applicant by Surrey's Admissions system, with the child assigned the lower number receiving the higher priority.

In the case of multiple births, where children have equal priority for a place, Surrey County Council will use random allocation to determine which child should be given priority. If after the allocation one or more places can be offered but there are not sufficient places for all of them, each child will be offered a place.

15. Waiting lists

Where there are more children than places available, waiting lists will operate for each year group according to the oversubscription criteria for each school without regard to the date the application was received or when a child's name was added to the waiting list.

Waiting lists for each year group at each community and voluntary controlled school will be maintained until the last day of the summer term 2027 when they will be cancelled. Applicants who wish a child to remain on the waiting list for the 2027/28 academic year must complete a Continuing Interest form through Surrey County Council between 1 July and 31 August 2027. Fully completed forms received during July 2027 will be used to reform the waiting list during August 2027. Applications received between 1 August and 31 August will be added to the waiting list as soon as they have been processed. If a Continuing Interest form is not received by 31 August 2027, the applicant will be required to submit a new in year application.

16. In-year admissions

The following applications will be treated as in-year admissions during 2026/27:

- applications for admission to Reception which are received after 1 September 2026;
- for any school which has a published admission number for Year 3, applications for admission to Year 3 which are received after 1 September 2026;
- applications for admission to Year 7 which are received after 1 September 2026;
- all other applications for admission to Years 1 to 6 and 8 to 11.

Applications for Surrey's community and voluntary controlled schools must be made to the local authority on Surrey's common application form. Where there are more applications than places available, each application will be ranked in accordance with the published oversubscription criteria for each school.

17. Starting school

The community and voluntary controlled infant and primary schools in Surrey have a single intake into Reception. All children whose date of birth falls between 1 September 2021 and 31 August 2022 will be eligible to apply for a full time place in Reception at a Surrey school for September 2026. Applicants can defer their child's entry to Reception until later in the school year, but this will not be agreed beyond the beginning of the term after the child's fifth birthday, nor beyond the beginning of the final term of the academic year for which the offer was made. Applicants may also arrange for their child to start part time until their child reaches statutory school age.

18. The admission of children outside of their chronological year group

Applicants may choose to seek a place outside their child's chronological (correct) year group. Decisions will be made on the basis of the circumstances of each case and what is in the best interests of the child concerned.

- Applicants who are applying for their child to have a decelerated entry to school, i.e. to start later than other children in their chronological age group, should initially apply for a school place in accordance with the deadlines that apply for their child's chronological age. If, in liaison with the headteacher, the local authority agrees for the child to have a decelerated entry to a community or voluntary controlled school the place cannot be deferred and instead the applicant will be invited to apply again in the following year for the decelerated cohort.
- Applicants who are applying for their child to have an accelerated entry to school, i.e. to start earlier than other children in their chronological age group, must initially apply for a school place at the same time that other families are applying for that cohort. If, in liaison with the headteacher, the local authority agrees for the child to have an accelerated entry

to a community or voluntary controlled school, the application will be processed. If it is not agreed for the child to have an accelerated entry to a community or voluntary controlled school, the applicant will be invited to apply again in the following year for the correct cohort.

Applicants must state clearly why they feel admission to a different year group is in the child's best interest and provide what evidence they have to support this. More information on educating children out of their chronological year group and the process for making such requests is available on Surrey's admissions web page.

19. Nursery admissions

The local authority has delegated the admissions of nursery children to the governing body of community and voluntary controlled schools/nurseries. Applicants wishing to apply for a place must complete the application form and submit it directly to the school or nursery that they wish to apply for in accordance with the dates set by the school.

In considering these arrangements for community and voluntary controlled schools/nurseries, see sections 9 to 15 for more information on:

- Looked after and previously looked after children
- Exceptional social/medical need
- Children of a member of staff
- Siblings
- Home address
- Tie breakers

Community and voluntary controlled infant and primary schools which operate a nursery during term time only, will offer sessions totalling 15 or 30 hours a week, depending on the school and the eligibility of the child. Each school will identify which sessions constitute the child's universal entitlement and which are their extended entitlement.

Places for two year olds

Some nurseries admit two year olds who meet the eligibility criteria to receive Funded Early Education for Two year olds (FEET). Where there are more applications than places available, eligible children will be ranked according to the following criteria:

a) Looked after and previously looked after children
b) Exceptional social/medical need
c) Children of a member of staff
d) Children who will have a sibling attending the nursery or the main school at the time of admission
e) Any other children

Where any category is oversubscribed, children will be ranked according to the straight line distance that they live from the school with priority being given to children who live closest to the school.

Once such children are placed on roll at a nursery, they will be automatically entitled to take up a three year old place and the number of places available for three year olds will reduce.

Places for three year olds

All children will be eligible to be considered for admission to a nursery class in a community or voluntary controlled school or nursery in the term after they turn three years old, although admission will be subject to an application being made and places being available.

When a nursery in a community or voluntary controlled infant or primary school is over-subscribed for a three year old place, applications for entry in 2026/2027 will be ranked according to the following criteria, which will be applied in the first instance to children wishing to take up the funded early years provision before considering other three year olds who are not yet eligible for funding:

a) Looked after and previously looked after children
b) Exceptional social/medical need
c) Children of a member of staff
d) Children who will have a sibling attending the nursery or the main school at the time of admission
e) Children who will turn 4 years old between 1 September 2026 to 31 August 2027 (this is to give priority to older children who will be due to transfer to Reception in the next academic year and hence only have one year left to attend nursery)
f) Children who will be 3 years old between 1 September 2026 to 31 August 2027 (these children will be able to stay on in nursery for another year in 2027/28 as they will not be due to start Reception until September 2027)

Where any category is oversubscribed, children will be ranked according to the straight line distance that they live from the school or nursery, with priority being given to children who live closest.

Procedures for admission

Each school will endeavour to inform applicants of the outcome of their application by letter, at least one term before admission. A school will only allocate nursery sessions once it has determined that a place can be offered in accordance with the admission criteria. If an applicant is offered a place they must confirm acceptance directly with the school by the date stipulated in their offer letter.

The final decision with regard to admission and the allocation of sessions rests with the governing body of the school.

Where a school is oversubscribed it will maintain a waiting list in criteria order.

Admission to a school's nursery does not guarantee admission to the Reception class at that school. Applications for Reception must be made on a separate application and be submitted by the statutory deadline in order to be considered.

Some schools or nurseries may allow parent/carers to pay for extra nursery provision, beyond their funded entitlement. However such requests will only be considered once all applications for the funded early year's entitlement have been processed.

In addition to nurseries within some community and voluntary controlled infant and primary schools, Surrey also has four stand-alone Nursery schools, in Chertsey, Dorking, Godalming and Guildford. One of these, in Guildford, has an attached Family Centre. These may provide a mix of full and part time places. Whilst these schools will also follow the admission criteria set out above, under the social and medical need criterion they may also consider

the individual learning need of a child, if it can be demonstrated that no other school can meet the child's learning needs.

20. Providing false or misleading information

If an applicant is found to have supplied false or deliberately misleading information or to have withheld any relevant information, the local authority reserves the right to withdraw any offer of a place prior to the child starting at the school.

21. Travel assistance

Surrey County Council has a Travel Assistance policy that sets out the circumstances in which children might qualify for travel assistance.

Generally, a child is eligible for travel assistance if they are under 8 years old and travelling more than two miles or over 8 years old and travelling more than three miles to the nearest school with a place. To be considered for travel assistance to a school that is not your nearest, you will normally be required to demonstrate that you have applied for and been refused a place at any nearer schools, although exceptions may apply to secondary aged children whose families are on a low income if they are travelling to one of their three nearest schools.

Eligibility to travel assistance is not linked to the admission criteria of a school. Some schools give priority to children who are attending a feeder school, but attending a feeder school does not confer an automatic right to travel assistance to a linked school. In considering admission criteria and school preferences it is important that applicants also consider the travel assistance policy so they might take account of the likelihood of receiving assistance to their preferred school before making their application.

In considering eligibility for travel assistance, the local authority will take account of all state funded schools, including free schools and academies.

Applicants should note that the opening of a new school or the permanent relocation of an existing school might change which school is assessed to be the nearest to an address when compared to assessments made in previous years.

A full copy of Surrey's Travel Assistance policy is available on Surrey's website at or from the Surrey Schools and Childcare Service on 0300 200 1004.

This page is intentionally left blank

Admission Arrangements 2026/2027 for Surrey County Council's community and voluntary controlled schools - Appendices 1 and 2

Contents

10

Appendix 1 – Published admission numbers (PANs) for Surrey County Council's community and voluntary controlled schools 2026

This document sets out Surrey County Council's Published Admission Numbers (PAN) for community and voluntary controlled schools for September 2026.

Primary schools

Elmbridge

School Name	PAN 2026
Bell Farm Primary	90
Cranmere Primary	60
Grovelands Primary	60
Manby Lodge Infant	90
Oatlands	90
The Royal Kent C of E Primary	Reception = 30 and Year 3 = 2
St James C of E Primary	60

Epsom & Ewell

School Name	PAN 2026
Southfield Park Primary	60
Stamford Green Primary	90
Wallace Fields Junior	68

Guildford

School Name	PAN 2026
Ash Grange Primary	30
Merrow C of E (Cont) Infant	60
Onslow Infant	60
St Mary's C of E (VC) Infant	30
St Paul's Church of England Infant (Primary wef September 2025)	30
Shawfield Primary	30
Wood Street Infant	30
Worplesdon Primary	Reception = 57 and Year 3 = 30

10

Mole Valley

School Name	PAN 2026
Barnett Wood Infant	52
Charlwood Primary	15
Fetcham Village Infant	60
The Greville Primary	Reception = 60 and Year 3 = 60
Leatherhead Trinity	Reception = 60 and Year 3 = 4
North Downs Primary	Reception = 60 and Year 3 = 4
Oakfield Junior	60
Polesden Lacey Infant	30

Reigate & Banstead

School Name	PAN 2026
Banstead Community Junior	90
Earlswood Infant & Nursery	**90**
Earlswood Junior	120
Epsom Downs Community Primary	60
Furzefield Primary Community	58
Langshott Primary	60
Manorfield Primary & Nursery	30
Meath Green Infant	90
Meath Green Junior	90
Reigate Priory Community Junior	**120**
Walton on the Hill Primary	30

Runnymede

School Name	PAN 2026
The Grange Community Infant	90
The Hythe Community Primary	60
Manorcroft Primary	60
Meadowcroft Primary	30
Ongar Place Primary	30
St Ann's Heath Junior	60
Stepgates Community	30
Thorpe Lea Primary	30

10

School Name	PAN 2026
Trumps Green Infant	60

Spelthorne

School Name	PAN 2026
Ashford Park Primary	90
Beauclerc Infant	30
Buckland Primary	60
Chennestone Primary Community	Reception = 30 and Year 3 = 40
Clarendon Primary	30

Surrey Heath

School Name	PAN 2026
Bagshot Infant	60
Heather Ridge Infant	60
Prior Heath Infant	60

Tandridge

School Name	PAN 2026
Audley Primary	Reception = 30
Dormansland Primary	30
Lingfield Primary	60

Waverley

School Name	PAN 2026
Badshot Lea Village Infant	45
Farncombe CofE Infant & Nursery	30
Shottermill Infant	60
Shottermill Junior	68
William Cobbett Primary	Reception = 30 and Year 3 = 60
Witley C of E (Cont) Infant	30

Woking

School Name	PAN 2026
St Mary's C of E (Cont) Primary, Byfleet	60

West Byfleet Infant	90
West Byfleet Junior	90

Secondary schools

Guildford

School Name	PAN 2026
Ash Manor School	270

Reigate & Banstead

School Name	PAN 2026
Oakwood School	330

10

Appendix 2 - Community and voluntary controlled schools in Surrey which will operate shared sibling priority for admission in 2026

Epsom & Ewell

- Wallace Fields Infant (Academy) and Wallace Fields Junior

Guildford

- Merrow C of E Infant and Merrow Junior (Foundation)

Reigate & Banstead

- Banstead Infant (Academy) and Banstead Community Junior
- Earlswood Infant and Earlswood Junior
- Meath Green Infant and Meath Green Junior

Runnymede

- The Grange Community Infant and New Haw Community Junior (Academy)
- Trumps Green Infant and St Ann's Heath Junior

Spelthorne

- Beauclerc Infant and Chennestone Primary School - Shared sibling priority only applies to Beauclerc Infant School

Surrey Heath

- Bagshot Infant and Connaught Junior (Academy)

Waverley

- Shottermill Infant and Shottermill Junior

Woking

- West Byfleet Infant and West Byfleet Junior

This page is intentionally left blank

Southfield Park Primary School

Southfield Park Primary School

Blenheim High School

Epsom Primary and Nursery School

N

Printed By: Admissions Team
Printed On: 24/11/2022
Project No:
Scale: 1:9,003 Original Size A4

Southfield Park Primary School

10

SURREY
COUNTY COUNCIL

This page is intentionally left blank

Stamford Green
Primary School

Stamford Green
Primary School

Printed By: Admissions Team
Printed On: 13/09/2022
Project No:
Scale: 1:13,418   Original Size A4

Stamford Green Primary School

10

SURREY
COUNTY COUNCIL

This page is intentionally left blank

APPENDIX 5
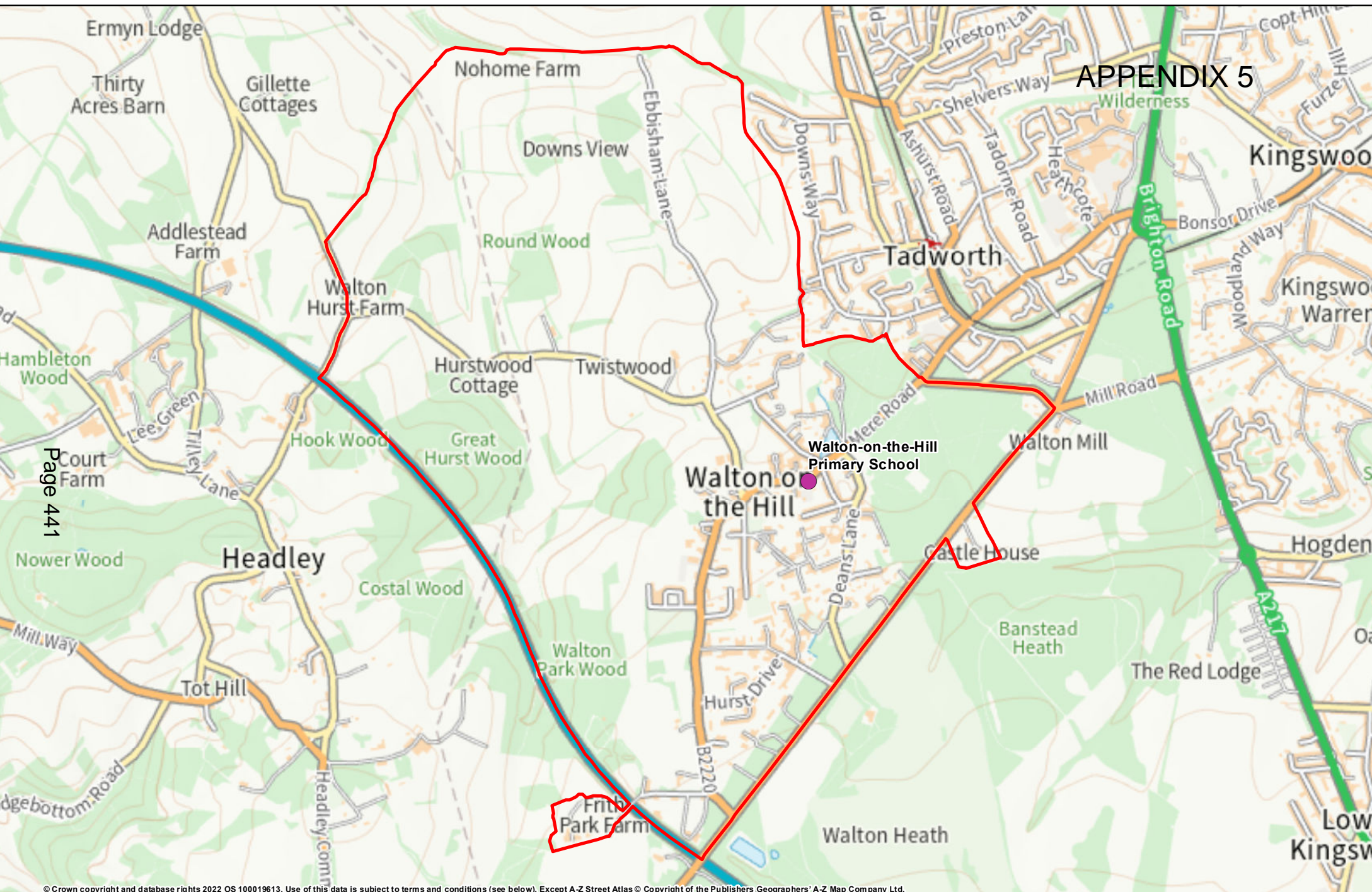
Page 441

© Crown copyright and database rights 2022 OS 100019613. Use of this data is subject to terms and conditions (see below). Except A-Z Street Atlas © Copyright of the Publishers Geographers' A-Z Map Company Ltd.

Printed By: Admissions Team
Printed On: 13/09/2022
Project No:
Scale: 1:19,922   Original Size A4

Walton on the Hill Primary School

10

SURREY COUNTY COUNCIL

This page is intentionally left blank

Supplementary Information Form Exceptional Social/Medical need – for community and voluntary controlled schools only

Applicants who wish to be considered for priority under the criterion of exceptional social/medical need **at a community or voluntary controlled school** should complete this form, **in addition to the local authority application form**. A request for exceptional social/medical priority will usually only be made for one school but if you wish to make a request for more than one school, please complete a separate supplementary information form for each school.

- If the application is for Year 7 in September this supplementary information form and supporting evidence must be submitted by 31 October. Any forms or evidence submitted after this date may not be considered until after the national offer day
- If the application is for Reception or Year 3 in September this supplementary information form and supporting evidence must be submitted by 15 January. Any forms or evidence submitted after this date may not be considered until after the national offer day
- If the application is for in year admission at any other time, this supplementary information form and supporting evidence must be submitted at the same time as submitting the application

Recent supporting evidence from relevant registered professional(s) involved with the child must also be submitted with this form, such as a doctor and/or consultant for medical cases or a social worker, health professional, housing officer, the police or probation officer for other social circumstances. All evidence must be on letter headed paper and reflect the child's current situation.

The evidence must confirm the circumstances of the case and must set out why the child should attend the preference school and why no other school could meet the child's needs.

Providing evidence does not guarantee that a child will be given exceptional social/medical priority at a particular school and in each case a decision will be made based on the merits of the case and whether the evidence demonstrates that a placement should be made at one particular school above any other.

Common medical conditions, allergies and asthma can usually be supported in all mainstream schools, therefore priority under a school's exceptional medical criterion would not normally be given for these. Some mainstream schools have units attached which provide specialist provision for children with an education, health and care plan which names the school. The facilities in these units are not normally available to children in the mainstream school and as such priority under a school's exceptional social or medical criterion would not normally be agreed for a mainstream place on the basis of a specialist unit being attached to the school.

In addition, routine child minding arrangements would not normally be considered to be an exceptional social reason for placement at a particular school.

Requests will be considered in accordance with the Equalities Act 2010.

Please complete all boxes in CAPITAL LETTERS

Supplementary Information Form – Exceptional social medical

1. Child's details

Question	Answer
Surname	
Forename	
Date of Birth (dd/mm/yyyy)	
Address	
Name of the school for which social/medical priority is requested (only name one school)	

2. Details of case

Question	Answer
Please set out the particular reasons why the school named in Section 1 is the only school that can meet your child's needs and the difficulties that would be caused if your child had to attend another school.	

10

Supplementary Information Form – Exceptional social medical

Question	Answer
Please list the supporting evidence that is being submitted to support your application under the exceptional social/medical need criterion	

Declaration

I understand that the information contained in this form is subject to GDPR (General Data Protection Regulation) and my personal data may be exchanged with other departments within Surrey County Council, other local authorities, admissions authorities, schools and Government agencies where necessary.

I understand that the outcome of this request for exceptional social/medical priority will be on the basis that the information I provide is accurate and correct and that if any information changes it is my responsibility to inform the local authority.

I certify that all relevant sections have been completed fully and I have supplied all the supporting evidence from the professionals involved to support my application under social and medical grounds.

I understand that if I submit this form or evidence after the closing date it may not be considered until after the national offer day.

I certify that the information I have given is correct.

Question	Answer
Signature of parent/guardian:	
Date:	

If you are applying online, please attach your completed form to your application. Alternatively, please return it to**: schooladmissions@surreycc.gov.uk** or by post to: School Admissions, Surrey County Council, PO Box 475, Reigate, RH2 2HP. If you are posting your form, we recommend that you send it by recorded delivery.

10

This page is intentionally left blank

Supplementary Information Form Children of Staff – for community and voluntary controlled schools only

Applicants who wish to be considered for priority under the criterion of Children of Staff **at a community or voluntary controlled school** should complete this form, **in addition to the local authority application form**.

- If the application is for Year 7 in September this supplementary information form must be submitted by 31 October
- If the application is for Reception or Year 3 in September this supplementary information form must be submitted by 15 January
- If the application is for in year admission at any other time, this supplementary information form must be submitted at the same time as submitting the application

Please complete all boxes in CAPITAL LETTERS

1. Child's details

Question	Answer
Surname	
Forename	
Date of Birth (dd/mm/yyyy)	

2. Parent/Guardian's details

Question	Answer
Surname	
Forename	
Name of school where employed	
Date employment commenced	
Address	
Postcode	
Telephone (Home)	
Telephone (Mobile)	
E-mail	

Page 447

3. Member of staff claim

I am a permanent member of staff in accordance with the local authority's admissions policy.

Delete as appropriate:

- I have been employed at the school on a full or part time basis for two or more years (at the closing date for applications)
- I have been recruited to a post at the school for which there is a demonstrable skills shortage

4. Declaration

- I understand that the information contained in this form is subject to GDPR (General Data Protection Regulation) and my personal data may be exchanged with other departments within Surrey County Council, other local authorities, admissions authorities, schools and Government agencies where necessary.
- I understand that the outcome of this request for children of staff priority will be on the basis that the information I provide is accurate and correct and that if any information changes it is my responsibility to inform the local authority.
- I certify that all relevant sections have been completed fully.
- I understand that if I submit this form or evidence after the closing date it may not be considered until after the national offer day.
- I certify that the information I have provided is correct.

10

Question	Answer
Signature of parent/guardian:	
Date:	

If you are applying online, please attach your completed form to your application. Alternatively, please return it to**: schooladmissions@surreycc.gov.uk** or by post to: School Admissions, Surrey County Council, PO Box 475, Reigate, RH2 2HP. If you are posting your form, we recommend that you send it by recorded delivery.

Consultation on proposed admission arrangements for community and voluntary controlled schools for September 2026

10

Introduction

Surrey County Council is consulting on proposed changes to admission arrangements for some community and voluntary controlled schools for September 2026.

Details of the changes being proposed are set out in this document.

The proposed admission arrangements for all community and voluntary controlled schools are set out in the following documents:

Annex 1   Admission arrangements for community & voluntary controlled schools

Appendix 1   Published admission numbers

Appendix 2   Schools to operate shared sibling priority

Appendix 3   Catchment map for Southfield Park Primary School

Appendix 4   Catchment map for Stamford Green Primary School

Appendix 5   Catchment map for Walton on the Hill Primary School

Appendix 6   Supplementary form for social/medical applicants

Appendix 7   Supplementary form for staff applicants

An equality impact assessment is included as **Annex 2**.

What changes are being proposed?

1. Reigate Priory School – Reigate and Banstead

For September 2026, the local authority is proposing to reduce the published admission number (PAN) at Year 3 for Reigate Priory School from 150 to 120. This change is reflected in Appendix 1 of Annex 1 which sets out the proposed PANs for all community and voluntary controlled schools for 2026 admission.

The primary planning area for Reigate comprises of Dovers Green and Holmesdale Community infant schools; Reigate Priory Junior School; and Sandcross and Reigate Parish primary schools.

Holmesdale reduced its Reception PAN from 120 to 90 in September 2023 in response to a fall in birth rates. Holmesdale is a feeder school to Reigate Priory, with the majority of children transferring to this school. The proposal to reduce the Year 3 PAN at Reigate Priory is a direct consequence of the reduction in PAN at Holmesdale, because there will be fewer children seeking to transfer to Year 3 in the Reigate planning area in September 2026.

Dovers Green is the second feeder school to Reigate Priory and this school will retain its PAN of 90. Historically, one third of pupils from Dovers Green transfer to Reigate Priory and two thirds transfer to Sandcross Primary School, which has a PAN of 60 for both Reception and Year 3.

Across Dovers Green and Holmesdale infant schools, there will be a maximum of 180 children seeking a Year 3 place in September 2026. Taking into account the proposed PAN reduction at Reigate Priory to 120 and the Year 3 PAN at Sandcross of 60, the total Year 3 PAN in the primary planning area of Reigate will be 180, which will match the number of Year 2 places at Dovers Green and Holmesdale.

Place planning forecasts indicate that there will be a need for 286 Year 3 places in September 2026 in the primary planning area of Reigate. If Reigate Priory reduces its PAN

from 150 to 120, there will be a total of 300 Year 3 places in the planning area across all schools - Reigate Parish (60), Reigate Priory (120) and Sandcross (120). There will therefore continue to be a sufficient number of Year 3 places across the whole planning area if Reigate Priory reduces its PAN.

The forecasts predict that the number of pupils needing a school place in Year 3 in the planning area of Reigate will remain between 263 and 298 from 2026/27 to the end of the forecast period 2032/33.

The proposed reduction in PAN at Reigate Priory is linked to the fall in birth rates and this consultation is separate to any decision about the future provision of primary school places in Reigate. As part of the consultation, parents will be directed to find out more about the current work with primary schools in the planning area of Reigate on Surrey's dedicated webpage Provision of primary school places in Reigate - Surrey County Council (surreycc.gov.uk).

This decrease in PAN would have no impact on children who are currently on roll at the school.

2. Audley Primary School - Tandridge

For September 2026, the local authority is proposing to introduce a published admission number (PAN) at Year 3 for Audley Primary School of 2. This change is reflected in Appendix 1 of Annex 1 which sets out the proposed PANs for all community and voluntary controlled schools for 2026 admission.

A Year 3 PAN at Audley Primary School will formalise the arrangement that already exists, whereby two additional children are offered a place from the waiting list at Year 3. However, the existence of a published PAN will ensure parents know about the intake and they will be invited to apply for a place as part of the Junior intake to the school.

Surrey's Education Place Planning team are supportive of this proposal, as are the Headteacher and Governing Body of the school.

3. How can you respond to the consultation?

The consultation on the admission arrangements for community and voluntary controlled schools and these proposed changes will run until Wednesday 13 November 2024. If you would like to take part, please complete an online response form available at www.surreysays.co.uk. Alternatively, if you would prefer to respond on a paper form, please telephone the Surrey Schools and Childcare Service on 0300 200 1004 (Mon-Fri, 9am-5pm) to request a copy. Please note that only response forms which are fully completed with the respondent's name and address will be accepted.

4. What happens next?

After the closing date, responses will be collated and presented to the County Council's decision-making Cabinet on 28 January 2025. It will decide whether to proceed with the proposed changes as well as determining the admission arrangements for all community and voluntary controlled schools for which no changes are proposed. Cabinet's decision will then need to be ratified by the full County Council on 4 February 2025. Once determined, the final admission arrangements for all community and voluntary controlled schools for 2026 will be placed on Surrey's website at www.surreycc.gov.uk/admissions.

This page is intentionally left blank

Consultation on proposed admission arrangements for Earlswood Infant School for September 2026

ANNEX 3

10

Introduction

Surrey County Council is consulting on proposed changes to admission arrangements for Earlswood Infant School for September 2026. Details of the changes being proposed are set out in this document.

For reference, the council has carried out a separate consultation on proposed admission arrangements for all other community and voluntary controlled schools between 2 October and 13 November. Details of this wider consultation can be found here. This consultation on Earlswood Infant School is linked to but running separately to this wider admissions consultation.

What changes are being proposed?

For September 2026, the local authority is proposing to reduce the published admission number (PAN) at Reception for Earlswood Infant School from 120 to 90.

The primary planning area for Earlswood and Salfords comprises of Earlswood Infant School, Earlswood Junior School, Salfords Primary School and St John's Primary School.

Place planning forecasts indicate that there will be a need for around 170 Reception places in the primary planning area of Earlswood and Salfords. If Earlswood Infant School reduces its PAN from 120 to 90, there will be a total of 180 Year Reception places in the planning area across all schools – Earlswood Infant (90), Salfords Primary (60) and St John's Primary (30). There will therefore continue to be a sufficient number of Year Reception places across the whole planning area if Earlswood Infant reduces its PAN.

The forecasts predict that the number of pupils needing a school place in Year Reception in the planning area of Earlswood and Salfords will remain around 170 from 2026/27 to the end of the forecast period 2033/34.

This decrease in PAN would have no impact on children who are currently on roll at the school. Surrey's Education Place Planning team are supportive of this proposal, as are the Headteacher and Governing Body of the school.

Admissions arrangements 2026/27

The school's admissions arrangements for 2026/27 will otherwise remain unchanged, that being if the school is over-subscribed for any year group, applications for entry in 2026/27 will be ranked in the following order:

First criterion: Looked after and previously looked after children
See section 9 here for information relating to looked after and previously looked after children.

Second criterion: Exceptional social/medical need
See section 10 here for information relating to exceptional social/medical need. A supplementary information form (Appendix 6) should be completed and returned by the application closing date for all applicants wishing to apply under this criterion.

Third criterion: Children of a member of staff
See section 11 here for information relating to children of a member of staff. A supplementary information form (Appendix 7) should be completed and returned by the application closing date for all applicants wishing to apply under this criterion.

Fourth criterion: Children who are expected to have a sibling at the school or at an infant/ junior school which will operate shared sibling priority for admission at the time of the child's admission

See Appendix 2 here for infant/junior schools that will operate shared sibling priority for admission for the purpose of this criterion. See section 12 for information relating to siblings.

Fifth criterion: Any other children

Remaining places will be offered on the basis of nearness to the school measured in a straight line from the address point of the child's home address, as set by Ordnance Survey to the nearest official school gate for pupils to use. See section 13 here for information on the definition of home address. See section 14 here for information on tie breakers.

How can you respond to the consultation?

The consultation on the admission arrangements for Earlswood Infant School and the proposed change to PAN outlined above will run until 17th December 2024. If you would like to take part, please complete an online response form available at www.surreysays.co.uk. Alternatively, if you would prefer to respond by email, please send your response to schoolorg@surreycc.gov.uk.

What happens next?

After the closing date, responses will be collated and presented to the County Council's decision-making Cabinet on 28 January 2025. It will decide whether to proceed with the proposed changes as well as determining the outcome of the wider consultation on admission arrangements for all community and voluntary controlled schools. Cabinet's decision will then need to be ratified by the full County Council on 4 February 2025. Once determined, the final admission arrangements for all community and voluntary controlled schools for 2026 will be placed on Surrey's website at www.surreycc.gov.uk/admissions.

10

This page is intentionally left blank

Surrey's Relevant Area for Admissions - 2025

The School Standards & Framework Act 1998 requires local authorities to establish Relevant Area(s) for admission policy consultations. The Relevant Area is the area in which admission authorities must consult with schools regarding their proposed admission arrangements before finalising them.

The Education Act 2002 requires the local authority to consult on and review its Relevant Area every 2 years.

Surrey proposes its Relevant Area to continue to be as follows:

i) The local authority will consult on the admission arrangements for community and voluntary controlled schools with:

- all schools within the administrative area of Surrey
- all 14 neighbouring local authorities
- any out of county academy and foundation, trust and voluntary aided primary school within 4.8 kilometres (3 miles) of the Surrey border
- any out of county academy and foundation, trust and voluntary aided secondary school within 8 kilometres (5 miles) of the Surrey border.

10

ii) Having first consulted with their Diocese, primary schools designated as having a religious character will consult with:

- Surrey County Council
- all other primary schools within a 4.8 kilometre radius (3 miles)
- other local authorities within a 4.8 kilometre radius (3 miles)
- other faith primary schools within their own deanery, according to guidance issued by their Diocese

iii) Primary academies and foundation and trust schools will consult with:

- Surrey County Council
- all other primary schools within a 4.8 kilometre radius (3 miles)
- other local authorities within a 4.8 kilometre radius (3 miles)

iv) Having first consulted with their Diocese, secondary schools designated as having a religious character will consult with

- Surrey County Council
- all other primary and secondary schools within an 8 kilometre radius (5 miles)
- other local authorities within an 8 kilometre radius (5 miles)
- other primary and secondary faith schools within their own deanery, according to guidance issued by their Diocese

v) Secondary academies and foundation schools will consult with:

- Surrey County Council
- all other primary and secondary schools within an 8 kilometre radius (5 miles)
- other local authorities within an 8 kilometre radius (5 miles)

This page is intentionally left blank

www.surreycc.gov.uk

Making Surrey a better place

Addressing Inequalities

Equalities Impact Assessment

10

Surrey County Council Equality Impact Assessment Template

Stage one – initial screening

What is being assessed?	**Admissions policy 2026**
Service	**School Admissions**
Name of assessor/s	**Claire Potier**
Head of service	**Trudy Pyatt**
Date	**4 September 2024**
Is this a new or existing function or policy?	**Existing policy under review**

10

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 policies being considered under this EIA set out the criteria for admitting children to community and voluntary controlled schools. In accordance with the School Admissions Code, these policies include processes and criteria that are fair, objective and transparent.

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**			• **Parents of 4 year olds can decide for their child to defer entry or start Reception full / part-time** • **Requests from the parents of summer born children for their child to be admitted to Reception in the year after they turn five will**

				• be considered on a case by case basis • **Older applicants will be prioritised for admission to a three year old nursery place as they will have less time to spend in nursery**
Gender Reassignment			X	
Disability	X			**Children with an EHCP naming a school are admitted before other applicants** **Provision made within the policy for priority to be given on the basis of medical need, where a disability warrants a place at a particular school**
Sex			X	
Religion and belief			X	
Pregnancy and maternity			X	
Race			X	
Sexual orientation			X	
Carers	X			**Potential for child carers to claim for social priority for a school place based on need**
Other equality issues – please state	X			**Children in care and children who have left care through adoption, a child arrangement order or special guardianship order, receive top priority for a school place by law, including children adopted from state care outside of England** **A translation service is on offer for parents who might find language a**

				barrier to understanding the literature and Surrey's Schools and Childcare service helps parents understand the process
HR and workforce issues	X			Priority for children of staff at the school with part time and full time employees being given equal priority
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) X	No
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.		
Briefly describe any positive impacts identified that have resulted in improved access or services		

For screenings only:

Review date	
Person responsible for review	
Head of Service signed off	
Date completed	

- 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

4

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)**

The policies being considered under this EIA set out the criteria for admitting children to community and voluntary controlled schools. These are statutory policies required by legislation and, in accordance with the School Admissions Code, these policies include processes and criteria that are fair, objective and transparent and that comply with equalities legislation and the Human Rights Act.

The main users of the policies will be parents applying for Surrey community and voluntary controlled schools.

The admission policy allows for children with an EHCP naming a school to be admitted ahead of other applicants. EHCP admissions fall outside the scope of admissions legislation.

The admission criteria make provision for looked after children and children who have left care through adoption, a child arrangement order or special guardianship order, as a top priority for admission, along with children adopted from state care outside England. The second criterion for admission allows for children who have a social or medical need for a place at a particular school to be given priority, this might include a child who has a disability or a child who has caring responsibilities for a parent.

Most children start school in the year after they turn 4 years old but all children must be in school in the term after they turn 5 years old. By law the admission arrangements for entry to Reception allow for a parent of a 4 year old to defer their entry until later in the school year or arrange for them to start school part time. In addition, parents of summer born children may ask for their child's entry to reception to be deferred for a year and these cases are considered on an individual basis according to the circumstances. However, by law, these applicants would have to reapply for a place in the following year.

The arrangements for admission to a three year old nursery place allow nurseries to give a higher priority to older children who might have less time to spend in nursery. The proposed admission arrangements for a two year old nursery place provide for a fair allocation of places to children who are entitled to the extended nursery provision.

The policies and application procedure are widely publicised on Surrey County Council's website, in print through publicity posters and on social media. Parents are encouraged to apply online and leaflets are sent out widely setting out how parents can apply and how they might obtain a paper

copy of the application form. Schools act as a support and advisory point for parents and primary schools are asked to target parents of children in their nursery to make sure they apply for a Reception place. Primary schools are also asked to check the applications made to ensure that all children who are approaching Year 7 transition have made an application. Online application numbers are high at 99.2%, which demonstrates that most parents have the access and ability to apply online. However, paper forms are readily available for parents who do not have the access or ability to apply online to ensure that these parents have equal access to school places. There is no evidence that would indicate that these families are not currently accessing the service.

The County Council also employs a dedicated translation service for all written material and the Contact Centre is used to support parents who might have difficulty in understanding and applying the policy.

Now describe how this fits into 'the bigger picture' including other council or local plans and priorities.

Surrey County Council acts as admission authority for community and voluntary controlled schools, whilst the governing body of each school acts as the admission authority for academies and foundation, trust and voluntary aided schools. The admission arrangements for all schools must be determined by 28 February each year and the arrangements and processes to determine which children will be admitted must be lawful and comply with the School Admissions Code.

The over-arching aspect of admission arrangements is that they must be fair and objective, give every parent the opportunity to apply for schools that they want for their child, provide parents with clear information and provide support to parents who find it hardest to understand the system.

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*

99.2% of parents applied online in 2024 and paper forms were readily available to parents who could not or chose not to apply online

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?

Schools which have changes being proposed have been consulted on the changes. All community and voluntary controlled schools have been sent confirmation of the published admission number that is to be proposed and have been offered the opportunity to query it if they felt it was incorrect or if they had anticipated a change.

The consultation is the opportunity to engage with parents and the wider school community. As part of the consultation process the proposed admission arrangements and coordinated schemes will be publicised both on the County Council website and in schools and nurseries. All forms of responses will be accepted including the standard response form, online responses and any other relevant correspondence.

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)

Based on the assessment of the policies and the evidence, these policies will have an overall positive equality impact.

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?

No evidence of any negative impact.

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.

That the recommendation set out in the accompanying report is approved.

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	Claire Potier
Head of Service signed off	Trudy Pyatt
Date completed	4 September 2024
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**

SURREY COUNTY COUNCIL

CABINET

DATE:	**28 JANUARY 2025**
REPORT OF CABINET MEMBER:	**SINEAD MOONEY, CABINET MEMBER FOR ADULT SOCIAL CARE**
LEAD OFFICER:	**JON LILLISTONE, DIRECTOR OF INTEGRATED COMMISSIONING**
SUBJECT:	**EVERYDAY LIVING OPPORTUNITIES**
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 seeks approval to progress the Commissioning Plan for supporting Everyday Living. The key drivers are to:
- ✓ Establish quality metrics and key performance indicators
- ✓ Establish a benchmarked pricing methodology
- ✓ Secure market sustainability and growth, enabling a more varied provision.

This report also presents the Adult Social Care (ASC) Travel Policy. This will:
- ✓ Ensure that residents can refer to a public facing document, offering transparency, and managing expectations
- ✓ Assure residents that decisions regarding travel for people that draw on support from adult social care are made consistently across the County
- ✓ Assure residents that SCC will support people to use the best method of travel that will promote peoples' independence, choice and control.

The Commissioning Plan for supporting Everyday Living and the Travel Policy have a direct bearing on the Council's ability to deliver on priority objectives:

- <u>Growing a sustainable economy so everyone can benefit</u>: the Social Care sector in Surrey depends upon a workforce of Surrey residents and on Provider Organisations that are financially stable. The Commissioning Plan explicitly seeks to stabilise, grow and diversify the market.

- <u>Tackling health inequality</u>: The Commissioning Plan covers support with everyday living for some of Surrey's most vulnerable residents. This includes engagement with mainstream health and wellbeing services. Social and community inclusion are widely recognised as having a direct impact on physical and mental health and well-being, as is active travel, promoted by the Travel Policy.

- The Travel Policy explicitly seeks to ensure that people are encouraged to use the most independent forms of transport, including Public Transport rather than taxis. The ELO Commissioning Plan seeks to grow the market for travel training. This Policy therefore has a direct bearing on the Council's ability to deliver on its priority on <u>Enabling a greener future</u>.

The Commissioning Plan and the Travel Policy both support the Council's commitment to ensure that 'No-one is left behind', seeking to establish the support to empower people who draw on services to <u>engage with and thrive in their local communities</u>

Recommendations:

It is recommended that Cabinet:

1. Approve the commissioning strategy for supporting everyday living for adults and young people in transition with eligible needs, through a Light Touch Regime procurement process under The Public Contracts Regulations 2015 or the Procurement Act 2023, as appropriate.

2. Approve that the ELO tender be commenced in quarter 4 of financial year 2024/25.

3. Approve delegated authority to the Executive Director, Adults, Wellbeing and Health Partnerships in consultation with the Cabinet Member of Adult Social Care. for awarding the contract/s.

4. To note the outcome of the formal consultation on the AHWP Travel Policy and to approve and agree to publish the AWHP Travel Policy as an integral document that supports the aims and desired outcomes of the Everyday Living Opportunities Tender.

Reason for Recommendations:

Most community services are currently commissioned via individual spot contracts, which offer a limited overview of equity, quality or price. With population growth, an ageing population, greater numbers living with disability, and financial constraints, more cost-effective approaches to procuring high quality support for people with eligible needs must be established.

The Travel Policy is an important enabler for this work, playing a central role in facilitating increased independent travel and supporting people who draw on services (and their families) to understand eligibility criteria and independently consider their travel options when accessing support with everyday living. The policy is an important tool for communicating with Surrey's residents.

Executive Summary:

Support with Everyday Living

1. In April 2024, the Everyday Living Opportunities (ELO) Project was established within the Transformation Programme for the Adults Well-being and Health Partnerships Directorate (AWHP). The specific aims of the project are to:
   ✓ Drive improvements in service quality and outcomes for residents
   ✓ Establish a more stable, growing, diverse marketplace.

11

✓ Strengthen cost effectiveness and support delivery of MTFS savings

2. AWHP invest just over £28.96m each year on support within scope of the ELO Project.

Client Group	Day Services	Outreach	Transport	Supported Employment	Total
LDA	17.227	3.303	4.012	1.282	25.825
PDSI	0.510	0.786	0.103	0	1.399
OP	1.029	0.220	0.116	0	1.364
MH	0.049	0.210	0.011	0	0.270
Carers	0.001	0.099	0	0	0.099
Total	**£18.815**	**£4.618**	**£4.242**	**£1.282**	**£28.957**

An additional £48.2m is spent annually through Direct Payments, the large majority being within scope.

3. The ELO project seeks to ensure support enables people to remain independent for as long as possible and to thrive in their communities. The models of care in scope are:
   ➢ Employment Support
   ➢ Vocational activity (unpaid activities that maintain and develop skills)
   ➢ Day services
   ➢ Community based outreach
   ➢ Travel training (time-limited)
   ➢ Non-residential short-breaks (respite)

4. The project links with other Transformation projects (e.g. Thriving Communities, Technology Enabled Care) to ensure asset-based commissioning. It links with initiatives address related themes, such as the 'Workwise' and 'Workwell' initiatives overseen by SCC's Public Health Department and the supported employment programme for people using mental health services overseen by Surrey Heartlands ICB.

5. To secure quality assurance and cost efficiency, the project is working to develop a strategic commissioning framework through which support with everyday living will be procured. This will:
   ✓ Establish quality metrics and key performance indicators
   ✓ Establish a benchmarked pricing methodology
   ✓ Secure market sustainability and growth enabling a more varied provision

6. The ambitions of the ELO project are to:

   • Promote and facilitate progression (skills gain and greater confidence)
   • Develop more vocational opportunities (unpaid) to aid skills development and confidence
   • Support greater numbers of people into paid employment (working with employers as well as the individuals seeking employment)
   • Expand the Travel Training offer to support more people to travel independently (facilitated by the Travel Policy)

11

- Establish a larger and more diverse range of non-residential short breaks, which sustain the skills gain and inclusion promoted by ELO models of care[1], to reduce reliance on unnecessary residential short-breaks
- By promoting and facilitating skills gain and social inclusion, people who draw on support will become more independent and achieve an improved sense of wellbeing.
- Social inclusion will benefit both the people who draw on support and other residents within the community: a diverse community is a strong community.

Travel Policy

7.   Currently there is no public-facing AWHP Travel Policy to inform people who draw on adult social care of the support they can expect from SCC to get to a service or activity set out in their care plan. The impact is that people who need to travel to access the support they are eligible to receive and their families are not able to independently consider their options or understand eligibility criteria.

8.   In accordance with The Care Act 2014 Local authorities should consider the adult's ability to get around in the community safely and consider their ability to use such facilities as public transport, shops or recreational facilities when considering the impact on their wellbeing. The current spend on Transport for Adults with eligible needs is over £2.8m, of which 93% relates to the learning-disabled population. In the absence of a Policy, support commonly equates to individual taxi hire, yet many people are able to travel independently, some requiring support to develop the required skills for use of Public Transport and road safety.

9.   Staff engagement in 2023 found that existing AWHP workforce guidance is not readily available and that staff need support in communicating to individuals the options available and the process for decision-making.

10. The Freedom to Travel Board agreed that residents and staff would benefit from a transparent published policy and, given the large majority of spend is to enable the learning-disabled population to access support, the Disabilities Commissioning were asked to lead its development.

11. The Policy has been developed with extensive engagement of people who draw on services and their families, followed by wider consultation. Once published it will be supported by staff guidance and both will be promoted.

12. The final draft, available as annex one, informs people who use adult social care services of the Councils statutory duties under the Care Act 2014 regarding the provision of travel support and the Councils obligations to promote people's independence. It is a tool for ensuring consistent decision-making across AWHP and for assuring residents of this. It also provides a clear and coherent process should a person who uses adult social care, members of their families or their carers appeal a decision.

---

[1] Commonly non-residential short breaks will equate to additional hours to existing 'placement's to ensure they benefit from established relationships and care plans.

13.   The policy supports the Freedom to Travel Vision that by 2030 all Surrey residents requiring travel assistance will have the freedom to travel to access opportunities that make their lives better so no one is left behind.

14.   Approval and publishing of the Travel Policy will:
   ✓ Ensure that residents can refer to a public facing document, offering transparency, and managing expectations
   ✓ Assure residents that decisions regarding travel for people that draw on support from adult social care are made consistently across the County
   ✓ Assure residents that SCC will support people to use the best method of travel that will promote peoples' independence, choice and control.

Consultation:

---

15.   Both the ELO Commissioning Plan and the Travel Policy cover all adults with eligible needs, and the ELO Commissioning Plan all models of community support that do not include accommodation. They have been developed over a period of over two years and there has been a significant amount of engagement with the different stakeholders during this time. This is outlined below, and further detail can be found in the 'Consulted' section towards the bottom of this paper.

16.   Staff in operational ASC teams fed into the design of both, either formally through project specific teams or though their own team meetings. Staff of the ICBs also fed in.

17.   People who draw on Services have been engaged through a number of established networks. Their Carers have been engaged separately.

18.   The broader cohort of people that use transport procured by AWHP were invited to additional focus groups to inform the Travel Policy.

19.   During 2024, three Market Engagement Events and five detailed focus groups about specific models of care sought providers' views that fed into the design of the ELO Commissioning Plan. We also published a Request for Information (RFI) which elicited 20 additional responses and 13 follow-up discussions with individual providers.

20.   Key findings from engagement discussions (further detail can be found as annex two) were as follows:
   • People would like to see more choice, and opportunities for day services that focus on developing independence and skills that lead to outcomes, rather than just activities.
   • The variety of offers is valuable - one size does not fit all.
   • People want a more community-focussed approach, making more use of universal offers, communication and collaboration. Links with libraries, transport hubs, businesses.
   • Need to influence public understanding to build inclusive communities - Safe Spaces schemes, quiet times, transport, green space, accessible environments.

11

- More focus on employment is welcome.
- Moving away from traditional based day services is welcome, acknowledging some building-based hubs will continue to be required.
- Location is important – people want support close to home, but currently it is not evenly distributed.
- Some support needs to be aimed at autistic people without a learning disability as well as people with a learning disability.

21. The draft Travel Policy, informed by the engagement above, was subject to full public consultation for 10 weeks, ending 31st December 2024. Key messages (further detail can be found as annex three) were as follows:

- People who draw on services, the people that support them and Adult Social Care staff want better information regarding the travel options available in local communities. People also highlighted the barriers to accessing both community transport and public transport.
- People want to be able to learn to travel independently
- There was a lack of knowledge from users and staff about the methods of support people could access such as the companion element of the bus pass and other aids (travel support cards) to help safe travel
- People wanted clearer guidance of how to appeal against decisions made by Adult Social Care regarding travel.
- People were asked their views regarding crucial elements of the policy that support the Care Act 2014's requirements and Surreys Climate change strategy. Most people who completed the consultation document agreed with the policies approach.

22. The Project Team leading the ELO workstream reports through the Community Opportunities Board and Market Shaping and Commissioning Board to AWHP DLT. That for the Travel Policy to the Freedom to Travel Board.

| **Risk Management and Implications:** |

23. ELO Commissioning Plan

i. Strategic:

➢ AWHP are committed to the co-design of an evaluation question with people who draw on support. It is proposed that answers to this question are then evaluated solely using criteria co-designed with people who draw on support. The Council will need sufficient time to co-design the evaluation question.

➢ In the current financial climate providers increasingly approach SCC to suggest financial vulnerability. This could lead to reduced diversity in the marketplace. The ELO workstream sends a positive signal that might mitigate this risk.

➢ There is an explicit driver to ensure people link with their local communities and mainstream services as much as possible. In the current financial

climate providers this may prove more difficult. The ELO workstream sends a positive signal that might mitigate this risk.

ii. Service Delivery (Injury / Harm)

➢ Spot contracts don't give enough visibility of quality of care. Until the council completes the procurement process, the risk is still carried.

➢ If Direct Payment uptake rates increase, there will be less visibility on quality (majority of DPs are ELO type models of care). However, we have inserted a clause into our standard contract to offer some protection against this risk.

iii. Financial

➢ There is an explicit driver to ensure people link with their local communities and mainstream services as much as possible. The current financial climate might mean that there are fewer of these available, which would have a financial impact on SCC. This makes the cost effectiveness and cost avoidance elements of the ELO Commissioning Plan all the more important.

➢ There is a risk that prices for services within the remit of the ELO Commissioning Plan could increase above budget affordability if the ELO tender is not conducted in a way that minimises this risk. The ELO project team will be working closely with Finance to ensure that the approach implemented for the tender mitigates this risk as far as possible.

24. Travel Policy

i. Strategic:

➢ By giving practitioners the confidence and guidance to explore different ways that may support people to travel independently e.g. Technology and/or Travel Training, the Policy mitigates the risk of not realising the council's ambition to support people who draw on support to link with their local community and, access mainstream services as much as possible.

ii. Financial

➢ The ASC annual spend on transport is 2.8m (Adults with Learning Disabilities and/or Autism). In addition, there are over 300 people who use their Direct Payments to pay for travel-related costs. The Travel Policy gives confidence and guidance to the practitioner to explore alternative forms of travel that builds independence and is better value. Without the policy, there is a risk that practitioners will feel less confident when exploring alternative options and continue to commission expensive taxis.

Financial and Value for Money Implications:

25. The delivery of ELO Commissioning Plan is intended to introduce contractual quality standards and regularise the costing approach for each model of care. While in itself this is not expected to deliver cost savings, it is a strategic tool for the more effective long-term management of the budget. The ELO project

team is working closely with Finance to ensure that the approach implemented for the ELO tender minimises financial risk to the Council.

26. There are £1.5m of efficiencies budgeted over the next three years for supporting people with Learning Disability or Autism with day care and transport packages to move towards a more personalised approach that is less reliant on more institutionalised building-based services. These efficiencies will be achieved through strengths-based reviews and effectively supporting people through changes in the way they are supported. Successful implementation of the ELO Commissioning Plan will help support delivery of these efficiencies through improving consistency of provision and enabling changes to care delivery models. The ELO Commissioning Plan will also support the delivery of efficiencies to contain demand pressures within the affordable trajectory outlined in the Council's Medium Term Financial Strategy through the cost effectiveness measures set out below.

27. The structured commissioning approach proposed affords greater cost effectiveness:

- By introducing a Travel Training offer there is expected cost avoidance through the reduction of transport related costs (supported by the Travel Policy)
- By growing the supported employment offer there is expected to be cost avoidance through the reduction of reliance on ASC, supporting achievement of cost containment demand management efficiencies.
- By introducing a larger and diverse range of non-residential short breaks there is expected to be cost avoidance through the reduction of reliance on unnecessary and more costly residential short-breaks.
- By promoting skills gain there is expected to be cost avoidance through a reduction in support costs, as people who draw on support become more independent and achieve an improved sense of wellbeing which will help delay or reduce unnecessary reliance on adult social care support.

Section 151 Officer Commentary:

28. 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.

29. 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.

30. The proposed implementation of the Everyday Living Opportunities Commissioning Plan and AWHP Travel Policy will support delivery of efficiencies budgeted in the MTFS related to changing care models and demand management through enabling improved consistency of care provision and more effective market management and brokerage of services.

31. It is important that the approach agreed for the ELO tender minimises financial risk to the Council as set out in the risks section above.

Legal Implications – Monitoring Officer:

32. 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 Procurement and Contract Standing Orders (PSCOs) and the Public Contracts Regulations 2015 (including any superseding legislation) (where appropriate).

33. The council has a statutory duty under the Care Act 2014 to meet a person's eligible needs, the Act states that, 'Local authorities should consider the adult's ability to get around in the community safely and consider their ability to use such facilities as public transport, shops or recreational facilities when considering the impact on their wellbeing'. There has been informal engagement and a formal consultation to seek feedback on the draft policy.

34. The best value duty is contained in s3 of the Local Government Act 1999 as a result of which the Council is under a duty to make arrangements to secure continuous improvement in the way in which functions are exercised, having regard to a combination of economy, efficiency and effectiveness. The relevant guidance states that Councils should consider overall value, including economic, environmental and social value when reviewing service provision.

Equalities and Diversity:

35. The EqIA for Everyday Living Everyday Activities EIA : Equality Impact Assessment - Surrey County Council) has highlighted a positive impact specifically for the following protected characteristics:

  i. Age
      - With the expansion of the supported employment offer people of working age 18 to 65 will benefit from more support which will enable them to access job opportunities.
      - Likewise, the expansion of Vocational activity.

  ii. Disability
      - Commissioners will have increased oversight of the market and will thereby be able to address gaps and duplication, as well as work to improve quality and promote progression.

- The Commissioning framework promotes the expansion of support for people diagnosed with dementia.

iii. Race

- Commissioners will require providers to ensure services are welcome for all by providing accessible information for people for whom English is their second language.

- Providers will be asked to report on the ethnicity of their clients and how they are ensuring their support is tailored to meet their individual needs.

iv. Religion

- Providers will need to ensure that they support different religions and beliefs.

v. Carers

- The expansion of the non-residential short breaks offer will benefit carers.

- Carers can be assured that the person they are caring for is being given the opportunity to expand their skills and meet their aspirations.

36. There are also negative impacts identified for groups with the following protected characteristics, which we seek to mitigate.

i. Disability

- The move towards greater independence in the community may cause some to feel anxious. The support to develop greater confidence and independent living skills will be personalised and will counter this.

- Providers might be reluctant to support people to move on to other services or employment that supports the individual's progression and skills gain. To reduce this risk, commissioning officers will promote move on and collaboration across the sector.

ii. Carers

- Move towards greater independence in the community may cause carers to feel anxious if they have been used to services being in building based, segregated settings. Support for Carers will seek to mitigate this.

37. Travel Policy EqIA (Equality Impact Assessment - Surrey County Council): The EQIA determined that the following groups with protected characteristics may be positively impacted by the Travel Policy.

i. Age

- The policy will support staff to advise people of all ages about their eligibility for Motability and any welfare benefits that support their travel.

- The policy will promote awareness amongst AWHP staff of new technology enabled devices that can support people to maximise their independent travel.

- Users and carers groups will be able to access information and advice to support people of all ages and signpost them appropriately.

- The policy should enable staff to support people of all ages to maximise their independence in the community e.g. attending hospital appointments, accessing employment and community activities

ii.   Disability

- The policy will help AWHP staff advise people with a disability about their eligibility for Motability and any welfare benefits to support their travel.
- User and carer groups will be able to access information and advice to support people with a disability and to signpost them appropriately.
- The policy/guidance should enable staff to support people of all ages to maximise their independence in the community e.g. attending hospital appointments, accessing employment and community activities

iii.   Digitally Excluded

- The policy will inform those that are digitally excluded how to access support without having to rely on others or having to use technology as phone numbers are also supplied within additional information.
- Paper copies will be available in various locations across Surrey e.g. Libraries.
- Paper copies can also be available upon request.
- The policy works with screen readers for those visually impaired. Copies can also be requested in large print and braille.
- People can also be referred to Tech Angels for support. This is delivered by Surrey Coalition of Disabled People.

iv.   Education/Training (literacy) Need

- The policy will be available to people in accessible formats including Easy Read which will ensure that they are able to access the policy and therefore have access to information and advice.

38.   There were no negative impacts expected from the implementation of the Adults Travel Policy.

Other Implications:

---

39.   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	ELO Commissioning Plan a) Establishes stronger contractual levers regarding safeguarding. b) The quality assurance measures providers must demonstrate to secure business from AWHP are designed to provide an early warning system. Travel Policy This transparently sets out the eligibility criteria and the process for determining the appropriate support with transport to services. The discussion

11

	occurs between the individual and their social care practitioner. Safeguarding legislation and good practice applies throughout.
Environmental sustainability	A full Environmental sustainability appraisal is not applicable. ELO Commissioning Plan The models of care in scope utilise existing community assets and facilities. The growth of a Travel Training offer promotes and facilities the use of Public Transport. Travel Policy The Travel Policy promotes and facilities the decreased use of private transport.
Compliance against net-zero emissions target and future climate compatibility / resilience	As above.
Public Health	The Commissioning Plan relates to the services people draw on that support them with their everyday lives; this includes engagement with mainstream health and wellbeing services, and social and community inclusion recognised as having a direct impact on mental well-being. Management of the market offering Employment support aligns with the management of Surrey's Workwise and Workwell programmes.

What Happens Next:

40. Indicative timeline (subject to change)

Early Spring 2025	- Commence the procurement process
Late Spring / Early Summer 2025	- Evaluation, Moderation, Governance - ELO Contract award notification - Travel Policy published and promoted - Staffing guidance regarding the Travel Policy internally published and promoted
Autumn 2025	- Mobilisation - Contracts commence - All new business goes through the new contractual process

41. Communicating the ELO Commissioning Plan to residents and stakeholders:

- Embedding the aspirations and processes within practice will be achieved through engagement with each adult social team, with staff guidance added to a designated share point page.
- The creation of a residents-facing webpage on Surrey County Council's website, which informs residents of the opportunities available to Surrey residents who draw on adult social care support.

42. Communicating the Travel Policy to residents and stakeholders.

- The Adults Travel Policy will be embedded in adult social care practice by engagement with each team. Engagement will include promotion of a staff guidance document that accompanies the policy and a staff reference page on share point.
- A residents-facing webpage about travel will be created which will include a link to the Adults Travel Policy. Staff will also be able to refer people to this link.

Report Author:

Anna Waterman, Head of Commissioning for Disabilities, Autism, Direct Payments and for Mid Surrey Mob: 07977 510492 | Email: anna.waterman@surreycc.gov.uk

Consulted:

Internal

i. Governance

The Everyday Living Opportunities Commissioning Plan and the Travel Policy have each been the subject of papers taken to the following:
- Councillor Sinead Mooney, Cabinet Member
- AWHP Senior Leadership Team
- Corporate Leadership Team
- Procurement Board, 10 December 2024 (Commissioning Plan only)
- ICAB, 26 November 2024
- Select committee: a briefing has been offered to Select Committee and will be arranged for January in advance of cabinet, if requested.

ii. Project Team

A project team has been established to design the ELO commissioning plan. This includes ICB colleagues.

The Travel Policy was designed by a sub-committee of the Freedom to Travel Board.

iii. Members of staff

Members of staff within the Central Disabilities Team, the Transition Team and the Mental Health Team were engaged in the development of the ELO commissioning plan.

11

Members of staff across AWHP were invited to engage in the development of the Travel Policy. The Core Team included the Senior Manager of the Transition Team.

External

i. The ELO project team includes ICB colleagues.

ii. People who draw on Services

Refreshing the commissioning approach to the model of care for Supporting people with their Everyday Living has been discussed over the last two years with a range of stakeholders and people that draw on adult social care services.

The networks used are:
- Valuing Peoples Groups (four Countywide)
- Surrey Peoples Group
- Autism Partnership Board
- Disabilities Partnership Board
- Learning Disability Partnership Board

The same groups were engaged in the development of the Travel Policy, and the broader cohort of people that use this type of service were invited to focus groups.

iii. Carers

We have engaged with stakeholders across the Carers' system.

iv. Providers

During 2024 we have held three Market Engagement Events and five detailed focus groups with providers about specific models of care. These equated to the active engagement of c80 different providers.

We published a Request for Information (RFI) which elicited 20 additional responses and 13 follow-up discussions with individual providers.

v. Formal public consultation

The draft Travel Policy, informed by the engagement above, was subject to full public consultation for 10 weeks.

Annexes:

Annex 1: Travel Policy (draft)
Following Cabinet approval in January 2025, the expectation is that the Policy and accompanying Staff guidance will be published by the start of the next financial year.

Annex 2: Summary of Market Engagement Feedback regarding the ELO Commissioning Plan

Annex 3: Summary of Feedback regarding the draft Travel Policy

Part 2 report

11

Annex one: Adults Travel Policy (DRAFT V7.4)

CONTENTS

11

11

1. Introduction

Adults, Wellbeing and Health Partnerships (AWHP) is a directorate of Surrey County Council which includes adult social care. AWHP is committed to the council's overarching ambition to help everyone in Surrey benefit from all the opportunities on offer in our county, and to ensure that no one is left behind, now, and in the future. The council is committed to helping those most in need of support and improving quality of life for everyone.

AWHP supports local people who draw on care and support by promoting independence, personal choice and control. This extends to support to travel, to enable people to be as mobile and independent as possible to help them achieve their personal outcomes and aspirations in their daily lives.

This document sets out the policy for the provision of support with travel by AWHP within its powers and duties under the Care Act 2014.

This policy provides a framework and best practice for professionals to implement when supporting people.

2. Purpose

2.1   The policy document sets out how residents are supported by AWHP and how they may be supported to get to a service/activity/occupation that meets their assessed eligible need under the Care Act 2014.

2.2   The policy document aims to inform residents of Surrey. It will ensure that the residents of Surrey who use AWHP services and their carers have access to the policy that is used for decisions made regarding travel.

3. Statutory duties of the local authority

3.1   The council has a statutory duty under the Care Act 2014 to meet a person's eligible needs. If attendance at a day service or community activity/occupation meets the individual's assessed eligible need, this **does not** automatically mean that transport to this service will be included.

3.2   If a person cannot travel to the service/activity/occupation independently or with support from their carer or family member, then the council will consider the most appropriate best value option that can support the individual to travel to the service that meets their assessed needs and supports their independence.

4. Legislation and policy context

The aims and underpinning principles of the policy are set is in section 7. They are to be understood within the context of national policy and legislation. For further

information about any of the legislation mentioned in this section, please visit: www.legislation.gov.uk

The Care Act 2014

The Care Act states that the local authority has a duty to prevent, postpone and minimise developing needs for care and support or delay people deteriorating such that they would need ongoing care and support. All assessments must be person-centred and based on promoting independence and overall wellbeing. People should be empowered to be in control of their own services (through personal budgets and direct payments where eligible) and supported by relevant and up to date information and advice that will enable individuals and carers to make the choices that are right for them.

The Act states that, 'Local authorities should consider the adult's ability to get around in the community safely and consider their ability to use such facilities as public transport, shops or recreational facilities when considering the impact on their wellbeing'.

Mental Capacity Act 2005

The Mental Capacity Act (MCA) is designed to protect and empower people who may lack the mental capacity to make their own decisions about their care and support. Every adult has the right to make their own decisions wherever possible. You can find out more by following the link below: Mental Capacity Act 2005 (legislation.gov.uk)

The Equality Act 2010

The Equality Act provides protection for people with protected characteristics against all types of discrimination.

Taxis and Private Hire Vehicles Act 2022

This Taxis and Private Hire Vehicles Act 2022 legislation sets out the specific responsibilities taxis and private hire have with respect to disabled customers and ensures they will have reasonable mobility assistance without being charged extra.

Surrey County Council Policies

The policies below add further context to the Adult Travel Policy.
- Surrey County Council Adult Social Care Vision
- Community vision for Surrey in 2030
- Active travel and personal mobility policy

The Joint Strategic Needs Assessment (JSNA) is an assessment of the current and future health and social care needs of the population of Surrey.
- Joint Strategic Needs Assessment

5. Scope

5.1 In scope

This affects all adults aged 18 and over who have an assessed eligible need under the Care Act 2014 and require support to travel to the activity that meets their eligible need.

5.2 Not in scope

People who live in or travel to and from residential or nursing homes are not within the scope of this policy.

Health appointments are not within scope of the policy. (For the avoidance of doubt, the council shall not fund or pay for any health-related services or therapy services as such services that are funded by the NHS.) People accessing hospital visits may be able to claim a refund of reasonable travel costs under the Healthcare Travel Costs Scheme, or people may be eligible for non-emergency patient transport.

Eligibility for transport assistance for young people within the age group of 18-25 with or without an Education, Health and Care Plan (EHCP) to attend an education placement is covered by the post 16 transport policy.

6. The policy

6.1 The Travel Policy aims to promote people's independence, enabling them to connect with their communities and promote an active lifestyle.

6.2 We will support people to learn, or re-learn, the skills to be independent.

6.3 If a person has difficulty in getting to a destination or finding the support to do so, the council will help them access the most appropriate travel option available. This includes community transport, public transport, voluntary transport schemes, technology-enabled support and any other travel support that may be available in the local area.

6.4 Surrey County Council will fund or arrange transport if it is the only reasonable way of ensuring a person can safely get to the service/activity/occupation that meets their assessed eligible need. If a person can get to a destination themselves or source the support to achieve this, there will be an expectation that they will do so.

6.5 If an individual has been assessed as requiring travel assistance to enable them to travel to a service/activity/occupation that meets their eligible need, short-term travel training, technology-enabled support, a personal assistant, a support worker, support from the individual's family or the voluntary sector will be considered in the first instance.

6.6 Other forms of travel support will be considered if the above is not available or will not enable the person to travel to a service/activity/occupation that meets

11

their eligible need. This could be funded by a direct payment or procured by the council.

6.7   There is an expectation that family/carers will pay for any costs incurred by carers to visit the person that is being supported by AWHP within Surrey or out of the county of Surrey (as per 5.2, travel to and from residential or nursing homes are not within the scope of this policy). This applies in all but exceptional circumstances.

7. Aims and underpinning principles of the policy

These are to be understood within the context of national policy and legislation (see section 4).

7.1 Be person-centred

Support plans reflect the way that people wish to live their life, pursue their interests, and achieve their aspirations. The client is supported to identify outcomes for the coming 12 months and the support needed to achieve them. If assessment shows that travel assistance is required, the form it takes will reflect the skills and abilities of the individual.

7.2 Promote independence through developing skills and the use of technology-enabled support

Local authorities have a duty to support people to be as independent as possible. People who use AWHP services will be supported to develop skills through various approaches that support an individual's strengths. This may be in the form of travel training or supporting a person to use technology that can support journey planning and travel. See Appendix 1 for definitions.

7.3 Promote choice and control

To broaden the choices available to people that are required to travel to a service that meets their eligible need by ensuring they have the right information at the right time. This information could include details of community transport.

7.4 Support the wellbeing of individuals and their carers

The local authority has a responsibility to promote individuals' and their carers' wellbeing which includes people's ability to have control over their everyday lives. This policy supports wellbeing by ensuring that assessors and decision makers take a strength-based approach when considering travel options.

7.5 Support people to be part of their local community

It is Surrey County Council's AWHP vision that people are connected to their local communities. The policy supports this vision with the expectation that people attend services/activities/occupations that meet their needs that are closest to their home.

11

7.6 Promote Surrey County Council values

Surrey County Council's Values can be viewed online.

7.7 Support value for money and better outcomes

The council has a duty to protect the public funds it administers, but still ensure the best outcomes for its residents. The aim of the policy is to ensure that people's assessed needs can be met by using the most appropriate best value method of travel for the individual.

7.8 Promote sustainable and green methods of travel

Surrey County Council is committed to delivering on a net carbon ambition by 2050 with reduction targets against 2019 levels of 46% by 2025, 67% by 2030, and 80% by 2035. This policy supports this ambition as it ensures that the individual and assessor explore various forms of travel and support methods before a taxi may be considered.

8. Principles behind consideration for travel support

The assessment of need for travel support provision will be an element of someone's care needs assessment, i.e. no service will carry an automatic entitlement to travel support. (See Appendix 1 for definitions of travel support).

11

8.1 Part of the adult social care needs assessment process will consider what support, if any, is needed. There may be more than one solution or option available and so each journey needs to be considered separately, as part of a person's adult social care support plan. The assessor will complete a travel risk assessment if appropriate.

8.2 If the person has a family member or friend who helps with their care, the council will involve them in the assessment and support planning process, and they will be offered a carer's needs assessment.

8.3 If the individual has a Motability vehicle there is an expectation that the Motability vehicle will be used to meet the individual's transport needs. If the vehicle is driven for them then a carers assessment will be offered to the person supporting. No petrol costs or other expenses will be considered for funding by the council.

8.4 The use of direct payments will be explored as part of an individual's support planning.

8.5 If transport assistance is provided by the council this will be kept under regular review and may be subject to change. This is because individuals may develop more independence and achieve outcome goals which means that other travel options may be available to them. It is the ambition of the council to support people's independence and to enable people to connect and stay connected to their local community.

8.6   The time that a person will be expected to travel in a vehicle will be determined on an individual basis.

8.7   If a person has been offered a travel solution, but this has been declined by the individual, the council may not pay the individual's preferred choice of transport.

8.8   If eligible the type of transport assistance offered will be that which enables a person to travel safely and is the most cost effective." E.g. shared taxis.

8.9   Transport is a chargeable service, which is subject to a financial assessment. The financial assessment will look at how much, if anything, a person is required to pay and will be carried out in accordance with the council's Charging policy for Adult Social Care services updated 2023.

9. Proximity

9.1   The council has a duty to ensure best value for money. Where a person is eligible, transport assistance will only be provided to the closest available service that meets their eligible needs.

9.2   In line with the council's Community Vision for Surrey in 2030, and with the Care Act 2014, everyone will be supported to be part of their community; we will therefore offer the closest available service/activity/occupation that meets their eligible need. If the individual chooses a different option that is further away from their home, the council may not meet the extra travel cost.

9.3   Depending on the client's location, the closest appropriate service may be in a neighbouring county.

10. Transport for young adults transitioning from children's services

10.1   In supporting younger adults along their pathway to adulthood, determining the best way to support the individual around travel support options and outcomes will be addressed via support planning with an AWHP care practitioner.

10.2   This support planning will consider how best to promote independence and inclusion and not increase the young person's dependence on others. Support planning will not focus on people's deficits but will focus on individuals' strengths (including personal strengths and social/community networks).

10.3   Travel assistance for young people aged 18-25 who have an Education, Health and Care Plan (EHCP) is outlined in the post 16 transport policyhttps://www.surreycc.gov.uk/schools-and-learning/schools/transport/16-plus/travel-assistance-to-school-or-college-for-students-aged-16-25.

11. Complaints process

It is the aim of AWHP to ensure that all decisions are made within the parameters of the legal policy that we work within. We will always aim to deliver the best possible service, but sometimes things go wrong, or we may fail to meet your expectations. Making a complaint does not mean that you will receive less help from us in future or that your complaint will cause difficulties for you. We can learn a lot from complaints, so we welcome your feedback.

Information about how to complain about Adult Social Care is available online or you can also contact the person or team that delivers the service you wish to complain about.

Appendices

Appendix 1:

Definitions

Travelling My Way

This is a programme that will support an individual to travel independently to the service/activity/occupation that meets their assessed eligible need. This may be walking, buses, trains, cycling (bikeability training) or a combination of these. Learning these skills may also benefit an individual's life and enable them to independently access their local community when they choose to do so.

Technology-enabled care and support

The use of technology to support an individual with journey planning and personal coping methods for distress and anxiety. Depending on the tech. package used, families and carers may also be able to track the individual's journey with their authorisation which can further give assurances to the carer and person receiving adult social care support.

Community transport

This is transport that is provided by district and boroughs and varies across the county. People may be able to use their bus passes.
Further details can be found by searching Dial-a-ride Surrey County Council or by visiting Connect to Support Surrey.

Volunteer car schemes

These are transport schemes are run by volunteers in the community and their criteria varies across the county. All these schemes can be found on Connect to Support Surrey.

Direct payments

Direct payments can be used by the individual to source travel or transport themselves using the sum agreed in the persons support plan.

Motability vehicles

An individual who receives the higher rate mobility part of Personal Independent Payment (PIP) /Disability Living Allowance (DLA), Armed Forces Independence Payment (AFIP) or War Pensioners Mobility supplement may choose to join the Motability Scheme. The individual must have 12 months left on their allowance. Individuals can exchange their qualifying mobility allowance for a new car, Wheelchair Accessible Vehicle (WAV), scooter or powered wheelchair.

There are two levels of the mobility component of PIP:
- Lower rate mobility component
- Higher rate mobility component

The current rates of PIP can be found online.

If a person has been awarded the higher rate mobility component of PIP/DLA or the Armed Forces Independence Payment (AFIP) or War Pensioners Mobility supplement they can choose to have a Motability car or vehicle. The individual must have 12 months left on their allowance and may choose to lease a vehicle, electric scooter or a powered wheelchair.

If an individual/appointee chooses to lease a car through the Motability Scheme, the scheme states that 'your vehicle needs to be used by the disabled customer or for their benefit'.

Taxis

Taxis are sometimes procured by Surrey County Council if a person has been assessed as requiring travel/transport support. Regular taxis can be paid for via a direct payment if this has been agreed on their support plan or procured by the council via the Surrey Schools Transport Assessment Team (SSTAT). If appropriate and people are travelling to the same location and live near to each other, sharing a taxi may be considered.

Day service transport

Day services may offer transport to their service which could be paid for by adult social care if there is an eligible need.

Surrey Connect: On Demand Bus Service

This is a digital on demand bus service that can be booked online known as a Surrey Connect Digital Demand Responsive Transport solution, that is available in Surrey. It is a safe and reliable bus sharing service that will connect you to your local community. This is available in Mole Valley, Cranleigh, Farnham, Longcross, North & West Guildford and Tandridge.

Appendix 2: Additional information

Bus passes

You may be eligible for a free bus pass if you're a Surrey resident with an eligible disability or you are a Surrey resident who is 66 or older.

A bus pass can be applied for online or by appointment in any participating Surrey library.

Bus passes are valid from 9.30am until 11.30pm Monday to Friday and anytime at the weekend and bank holidays. Some bus companies offer a concessionary rate to bus pass holders before 9:30am; this will have to be checked on the bus providers' website for the most up-to-date information.

If the person requires support to access the bus, you may be eligible for a companion pass. This pass entitles you and your companion to free travel within Surrey. If you travel outside of Surrey your companion may be asked to pay. To qualify for a Companion Permit (identified by a +C on your pass), you will need to provide a letter from either social care services, Sight for Surrey or a medical professional involved in your care, stating that you require assistance to travel. Alternatively, please supply a copy of your PIP with 12 points for the "Planning and Following a Journey" activity.

Further information about Surrey bus passes is available online.

Alternatively, you can contact Surrey County Council as follows:
- **Availability**: 9am to 5pm, Monday to Friday
- **Telephone**: 0300 200 1005
- **Textphone (via Relay UK)**: 18001 0300 200 1005
- **Text (SMS)**: 07527 182 861 (for the deaf or hard of hearing)
- **British Sign Language**: Sign Language Video Relay Service
- **Email**: freebuspass@surreycc.gov.uk

Buses

If you are aged between 18-20 you may be eligible for a Surrey Link card. This card gives you 50% off the adult fare for any journey starting and ending in Surrey.

Blue Badge

People who receive PIP and receive 8 points OR MORE in the 'moving around' descriptor or those people who receive 10 PIP points in the 'planning and following a journey' descriptor and the applicant cannot undertake any journey because it would cause overwhelming mental distress are automatically entitled to a Blue Badge. An application will still have to be completed. The council website has more information on the Blue Badge scheme, eligibility criteria and how to use your blue badge and includes a video showing how to make your application.

Hidden disabilities

If people have a hidden disability, there are several different cards that are universally recognised by organisations including bus providers that can be used to indicate to the driver that the person has a hidden disability.

Sunflower lanyard

If you have a sensory loss, a physical disability that is not obvious, autism, a learning disability, anxiety or any other mental health condition, you can apply for the sunflower lanyard.

ARRIVA Journey Assistance Card

These can be downloaded and printed. The Arriva Journey Assistance card can be used to indicate that a person has a disability and/or what type of disability or can be used to indicate where a person may want to alight the bus.

Helping Hand assistance card

Surrey County Council has worked alongside Brighton and Hove Council and other key stakeholders to produce the Helping Hand assistance card. The card is helpful for people with hidden disabilities and holds a brief written instruction that can be shown to the driver when boarding the bus.

People can apply for a Helping Hand assistance card online.

Alternatively, you can contact:

- **Telephone:** 01273 886200
- **Textphone (via Relay UK)**: 18001 01273 886200
- **Text (SMS):** 07583 051915 (for the deaf or hard of hearing)
- **Email:** info@buses.co.uk

Trains

There are several rail cards available that can enable people to receive a 1/3 off eligible journeys. The card is for one year and can be renewed annually. To find out what card you are eligible for, more information is available online at trainline. Please note that there may be a charge for the card.

Annex 2- Summary of Market Engagement Feedback regarding the ELO Commissioning Plan (further detail available upon request)

User engagement was started in January 2023:

Learning Disabilities and Autism: We spoke to people via the:

- Surrey Peoples Group
- Valuing People Groups (included carers)

People told us that they enjoyed going out in their local community, and making and maintaining friendships was important to them. They liked the support that they received to access the community; however, they wanted to have more choice in the decisions that were made regarding their support and the activities that they did. Though they enjoyed going out and about, it was important to them that they had access to a place if they felt unsafe or it was a cold wet day. This need could be met by an increase in and knowledge of the locations of safe spaces, or the use of community hubs. Some services also have buildings from which they meet at, therefore offering a hybrid model of care.

People also said that they would like to be more independent and have more choice and control about the journeys they make and the activities they can attend, but poor transport links or lack of travel training meant they were unable to do this. The development of a Travel Training offer will go some way to mitigate this, along with improved knowledge regarding the different community transport options available, however the improvements to bus links is out of scope for this tender.

People wanted to be able to work and have more opportunities to volunteer as well as have more control over the times that they can stay out. There was a lack of staff to support people to go out in the evening and if they were able to be out after 8pm a lack of activities.

Summary of Feedback from Service providers

Engagement with the provider market has been ongoing throughout 2024 in the form of market engagement events.

- In November 2024, a Request for Information (RFI) was issued to the market to gain understanding of current market capabilities, capacity and appetite to deliver the models of care.

- In December 2024 50 different providers engaged in Focus groups, contributing to in-depth conversations focusing on the different ELO service models.

The following is a summary of the main points from service providers as part of this market engagement activity:

Centre based support
- Models of delivery are generally similar in that they have hubs where a variety of activities are offered, and support and activities also take place in the community. A small number of providers felt that the current offer does represent diversity, and there

were examples of more diverse offers including nightclub events, theme park trips and drama groups.

- A key theme that emerged is that the ratio of time spent within the community shouldn't be the focus, but rather the outcomes for the individuals attending the services.
- Ideas from providers on how the commissioning approach could facilitate community inclusion include, a focus on outcomes that promote active participation in local life, such as time spent in community settings or involvement in local groups.
- Also need to look at how communities can be more accessible

Independent Travel Training

- The RFI found that 9 of the Surrey providers currently offer travel training, 12 would like to offer or continue to offer it in the future. There was also interest in the follow up discussions with many of the providers indicating they would like to deliver this as part of their service.

- Providers felt that the best model for this support is multiple providers across the county was, with very little favour for one country wide provider or one provider per area.
- Important for providers to have support from Occupational therapist (OT) role to ensure appropriate right referrals come through and to provide some oversight of the process.

Community and Life skills (Outreach)

- Feedback from providers is that the term 'outreach' is broad and can encompass aspects of service delivery including supported volunteering, employment support and can also be delivered via group activities or smaller subgroups or sometimes on 1:1 basis.
- A clear definition for outreach and day services may be needed to clearly distinguish between the two offers.
- There is interest in delivering outreach services from most providers that responded to the RFI
- Many providers believe there is an unmet need for evening and weekend sessions, acknowledging the importance of a flexible offer that allows supported individuals to socialise in the evenings, and provides crucial respite for carers.

Supported Employment

The RFI showed that 6 of the Surrey providers currently offer support to secure and retain paid employment.

- Most providers commented that while some support can be delivered in small group sessions, the delivery model needs to be for 1:1 support mainly due to the varying communication needs and learning rates, and the fact that support is facilitated by having a trusting relationship with a support worker with customised job coaching and training.
- Providers highlighted that while job carving benefits people with severe to moderate learning disabilities, employers are less likely to be offering this as roles become broader and multitasked. This would require robust employer relationship management and employers willing to create job (carving) opportunities.
- Most providers that responded agree that there is a gap in the market with supported employment and more services are needed.
- There is also a gap in the market for employers willing to employ people with disabilities. It was suggested that the Council could play a role in 'educating' employers on benefits of inclusion, and employing people with disabilities.

ANNEX 3 – Travel Policy consultation feedback

1. The Impower Staff Survey, completed in 2022, highlighted the need for a Travel Policy. At this time there was guidance available to staff members however 73% of staff who completed the survey were unaware of this. The lack of a policy also led to inconsistent decision making and created a lack of confidence for staff as they had no formal document to refer to or refer residents to.

2. A new staff survey was sent in early 2023 to capture up to date views of Adult Social Care staff. This confirmed the information received via the Impower report.

3. A research survey was sent to targeted user groups for all cohorts to understand what the main concerns would be regarding the Travel Policy and to understand their awareness of Adult Social Care travel support.

   It was identified that 64% of respondents did not know or were unsure where to find out what travel options were available and what support they could get. To help mitigate this links and information have been added to the policy to help people find out the options available to them in the community, and what other support could be available to help them with their journeys. Focus Groups were held with people that use services to discuss travel information. This was feedback to the Freedom to Travel Programme, concerning things such as inaccessible bus timetables and difficult booking systems for community transport.

   Through the survey we explored people's views regarding the use of Motability Vehicles, more people agreed that the use of a Motability Vehicle to get to the service that meets the persons eligible need should be explored and used unless it is assessed that there is a reason that this is not possible. The use of Motability Vehicles has been raised as a contentious issue by professionals when exploring their use with people.

4. Formal Public Consultation was open for 10 weeks and closed on 31 December 2024, 75 responses were received. It was widely promoted through social media channels and through stakeholder and user groups. The Consultation was available in all accessible formats and easy read.

   The questions focused on the themes of the policy which are strength-based practice, promoting independence, choice and control. Most people agreed with this approach and saw travel training and the use of community and public transport as methods to support this. The survey explored the use of shared vehicles to reduce the number of single journey taxis, and the majority of people agreed with this. This is included within the policy and the staff guidance but had not previously, this will be a change for staff and how they explore the use of taxis if this is the only appropriate method of travel.

   From the feedback received during the consultation there have been no contentious themes which would mean any changes to the policy. The final report will be available by Cabinet on 28 January 2025, this report will include any qualitative data.

11

This page is intentionally left blank

SURREY COUNTY COUNCIL

CABINET

DATE:	**28 JANUARY 2025**
REPORT OF CABINET MEMBER:	**SINEAD MOONEY, CABINET MEMBER FOR ADULT SOCIAL CARE**
LEAD OFFICER:	**CLAIRE EDGAR, EXECUTIVE DIRECTOR AWHP**
SUBJECT:	**TECHNOLOGY ENABLED CARE AND HOMES (TECH)**
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 use of technology and data insights is critical to the future of both health and social care. This Technology Enable Care and Homes (TECH) report builds upon previous Surrey initiatives in this area.

With increasing financial pressure on health and social care and the need for more equitable access to personalised care and support, a reliable, scalable and more diverse offer of TECH is essential.

Our current technology offer must develop alongside both our 'front door' work in adult social care and our new approach to delivering good social care.

TECH must, and will, play a significant role in achieving our corporate transformation ambitions, reaching our efficiency targets and modernising service delivery. Therefore, TECH will be taken forward through a multi-disciplinary approach ensuring work is well planned, well led and well resourced.

This programme of work helps Surrey County Council meet all key priority areas:

- Enabling residents to achieve the outcomes they want through personalised and independent solutions to health and care needs. This will ensure no-one is left behind.
- Supporting our economy by working with local suppliers and services to maximise opportunities for business growth, employability and service sustainability within Surrey.
- Tackling health inequality driven by demographic challenges that can cause inequitable access to services and support based on where people live, and where services are provided from.

- Reducing the need for staff, carers and families to travel to deliver low-level care and support tasks, thereby reducing travel and associated environmental impacts.
- Empowering greater connectivity and social movement by ensuring people can remain at home and access and contribute to their own communities for longer.
- Embracing the power of technology and data insights will ensure we can identify areas of high performance and maximise these for our residents, the Council and our partners.

This report seeks Cabinet approval for the future delivery of the TECH strategic approach and long-term delivery plans.

Recommendations:

It is recommended that Cabinet:

1. Note progress made to date to review current pilot technologies
2. Note benchmarking and profiling of our service, including our need to improve outcomes tracking and benefits realisation approaches
3. Agree our strategic ambition for developing technology enabled care and homes (TECH)
4. Approve our commissioning and procurement approach
5. Approve our priority areas and phasing of technology roll out to support staff with culture growth and technology adoption
6. Agree financial investment required for first 2 years of delivery
7. Agree intention to return to Cabinet in 2026 to set out 5 to 10-year strategic delivery plan and strategy

Reason for Recommendations:

Whilst benefits have already been achieved through our current TECH offer in Surrey, there is considerable opportunity for greater growth and benefits realisation. This paper sets out a more ambitious delivery model with clear commissioning and procurement approaches that maximise opportunity and reduce risk to the Council.

Our recent review of the current offer has highlighted some key focus areas. We must improve our internal processes and enable easier identification of TECH solutions. We must also improve our systems and outcomes tracking if we are to be able to demonstrate TECH benefits more quickly and clearly.

Our strategic ambition is to embed TECH as a core part of social care delivery. By demonstrating outcomes more clearly, we will be better placed to identify future investment from partners to grow our offer and align with other TECH, AI and digital programmes. We will also develop a strong self-funder and front door offer for residents.

With no new funding we must target our core delivery of TECH to the areas of highest need and greatest impact. Prioritisation will therefore be based upon corporate transformation, demand management and high-cost areas.

Prioritisation is also key to ensuring staff can be supported to embed the culture growth required to see TECH succeed. Members shared that they felt TECH would fail if it was to be used everywhere, with all staff from the start. A recent review demonstrated staff knowledge and confidence was generally low across the organisation and varied considerably from team to team across Surrey. Positively, the majority of staff spoken to so far seem excited about TECH and want to engage so we must use this interest to progress.

The Contract Management Advisory Service (CMAS) were asked to support the TECH team to assess the options for the provision of TECH in Surrey. Commissioning, operations, IT&D, finance and the TECH team were involved in the process. Three options, detailed later in this paper, were explored with one preferred and recommended to help further our ambition.

Given the above we intend to outsource a core commissioned service for a minimum of two years. This will allow us to gather more robust data and evidence to develop a better offer for TECH with greater evidence of staff learning and engagement. The recommendation for a longer-term strategy is based upon national comparators and benefits realisation timeframes.

Executive Summary:

Progress made to date

1. Surrey has adopted the use of technology across Adult Social Care since 2021. Positive outcomes have been achieved for residents utilising this technology and there are many good case studies demonstrating the personal, and financial, benefits achieved. Please see Appendix One for case studies and Appendix Two for the financial impact and care outcomes achieved by TECH.

2. We have taken these pilots and in recent months, through working with teams, either consolidated or ended them. In doing so we have improved recording, reporting and reviewing of outcomes of cases. This has been a critical step as much of the outcome reporting has been manually driven to date and wholly subjective.

3. We have reviewed all existing cases to better understand staff use, safety and compliance and to work through process improvements to encourage greater

uptake for future technology use. Staff engagement has been good and we are seeing improvements in referrals and use.

4. Governance has improved with greater representation and involvement for the programme from across directorates and teams.

5. We have been able to consolidate key relationships such as with Mole Valley Borough Council/Mole Valley Life to give us consistency and continuity for those benefitting from TECH now and in the future.

6. Outcomes from the recent Care Quality Commission inspection and Newton Europe Diagnostic work have helped shape a new approach to TECH by defining the scale of benefit to our workforce as well as our residents.

7. For the scope and definition of TECH for the purposes of this paper, please see Appendix Three.

Benchmarking and improved outcomes and benefits tracking

8. The TSA estimates that currently councils in England are spending £170-200 million on TEC services (circa 1% of ASC budgets) and over 5 years this could achieve financial benefits in the region of £0.4-0.6 billion. Currently, SCC does not invest 1% of ASC budgets in TECH. Total SCC TECH spend (including telecare but excluding TECH team resourcing) is circa £1m. This is an approximate estimate due to the flux in spend on pilots. Fuller detail on TECH spend can be found further down in this report.

9. Our pilot approaches are however, broadly in-keeping with aspects of delivery from other local authorities. Models do vary dramatically across the country but will include very similar technologies to those being deployed in Surrey.

10. Our pilots have been split into two main areas:
i. Mole Valley Life (MVL), part of Mole Valley Borough Council, tested the adoption of motion sensor technology, installed and monitored and supported through a responder service to act on alerts. Initially a small-scale pilot, this service has now grown to cover much of Surrey.
ii. Other pilots have been developed exploring the use of apps and Smart Home technologies, for example within the Transition, Mental Health and Learning Disabilities and Autism teams. This has improved independence and reduced care dependency in some cases.

11. The challenge nationally remains a uniform approach to evidencing avoided costs and savings for often preventative interventions, therefore benchmarking remains unreliable. Our work is not only developing well in this area but is contributing to current national benchmarking best practice.

12. Our next phase of moving from pilot to practice will be to integrate TECH in our day-to-day work. Approaches will be developed with, and by, staff to help embed TECH in core assessment paperwork and referral and review processes, for example. Peer conversations show clearly that TECH has to become part of what a local authority does in the delivery of its core services, both statutory and discretionary, and not be seen as separate.

Strategic Ambition (workforce)

13. Managing culture change predominantly in-house is imperative to the success of the programme. So far technology has sat outside of what we do day to day.

14. We will therefore focus on the following activities as we move into 2025:
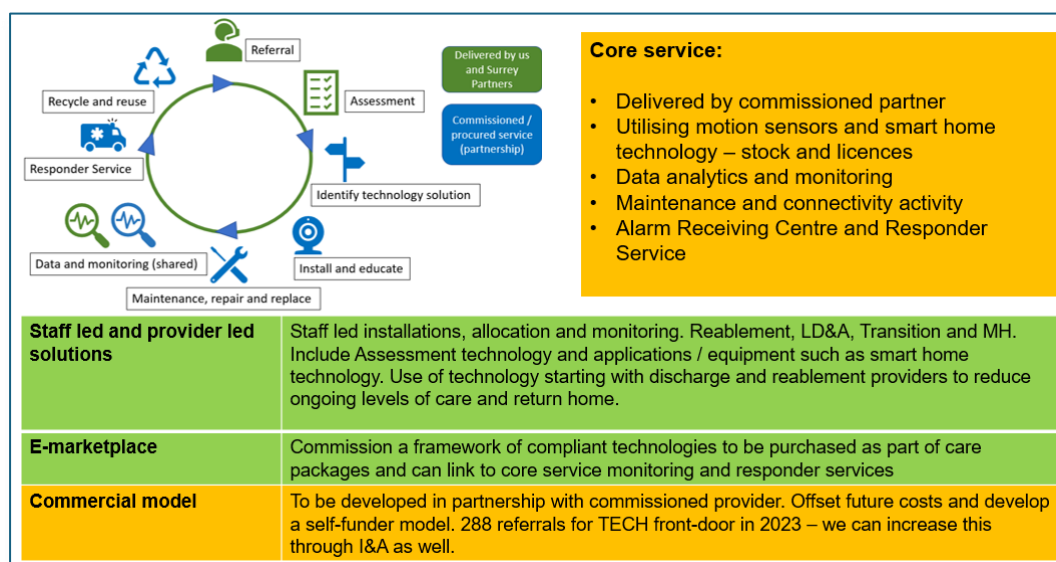
i. Staff engagement and coproduction - workshops with staff regarding outcomes, processes and pathways in their day-to-day work where technology can support.
ii. Refine and re-work decision-making processes such as Consistent Practice Methods meetings.
iii. Expand our Champion Network of staff volunteering to become TECH champions within their teams.
iv. Recruit Technology Advisors to support teams as part of service redesign.
v. Re design technology referral forms and modify current documentation on record keeping systems to allow technology to be considered and accessed more easily with reporting and reviewing made easier and more accurate.
vi. Focus on user feedback including creation of a TECH Reference Group with clients and carers testing and feeding back opportunities, views and barriers.
vii. Working with carers to define and develop how technology can provide carer relief and assist them in remaining in their roles for longer.
viii. Technology at the front door – how can we support, advise and signpost for independent self-management and installation / use of technology with our partner agencies.
ix. Redesign and re-launch of SharePoint site – an interactive hub for sharing of real-life impact stories of technology, latest pilots and updates from TECH team.
x. A final element of our approach will be to train staff in the installation and use of smaller, more intuitive assessment and long-term technologies. These will be, in the main, plug and play technologies such as smart home technology and have their own monitoring and reporting platforms.

Strategic Ambition (Delivery)

15. In the medium term, we will use the existing contract and extension with Mole Valley Borough Council for the management of the core infrastructure. This will provide a connected platform for installation, monitoring and response. With greater strategic leadership in this area, we will be able to maximise outcomes

from this relationship and service more consistently. This will increase benefits as well as numbers of individuals receiving support.

16. Costs associated with new technologies will be met within locality budgets as part of someone's assessed care package. We will explore how we can move to a truly technology-first approach with technology and associated IAG explored initially in an assessed care package.

17. We will undertake market engagement and develop an e-marketplace for technology that will ensure we can purchase the right equipment from the right providers for the right personal outcomes.

18. We will deliver a twin-track, multi-disciplinary approach to the overarching technology programme. There are opportunities to reduce current care reliance, representing a **saving** in current care costs. We will also deliver **avoided costs** and ongoing cost mitigation.

Staff led and provider led solutions	Staff led installations, allocation and monitoring. Reablement, LD&A, Transition and MH. Include Assessment technology and applications / equipment such as smart home technology. Use of technology starting with discharge and reablement providers to reduce ongoing levels of care and return home.
E-marketplace	Commission a framework of compliant technologies to be purchased as part of care packages and can link to core service monitoring and responder services
Commercial model	To be developed in partnership with commissioned provider. Offset future costs and develop a self-funder model. 288 referrals for TECH front-door in 2023 – we can increase this through I&A as well.

Options Appraisal

19. There are three main options for the Council at this stage:
   i. **Option One** – **Do nothing** – stay with the existing provision and extend the pilot period, maximising outcomes as far as possible. No growth potential within this model of delivery.
   ii. **Option Two** – maintain current core service offer with improved management and oversight. Work with Procurement to seek multiple providers to work with us to provide agility and choice when identifying tech solutions. This will provide access to technologies funded within someone's assessed care package. Growth predicated on individual and service-led demand.

iii. **Option Three** – seek central investment to fund a technology offer where target capacity is driven by available resources in the TECH budget / service. The benefits of this model include purchasing more strategically and economically and consolidating a data analysis platform for all technologies. However, this would require significant demand modelling and confidence of outcomes being met and capacity being maximised.

20. To look further into the detail of three options described above, we considered the options of fully insourcing, fully outsourcing or taking a combination approach to delivery of different elements of the service. These were assessed according to strategic performance, attractiveness and achievability.

21. Summary of key decisions:
    iv. Insourcing Alarm Receiving Centre and Community Responder Service would be impractical.
    v. Insourcing the installation, maintenance (repairing and replacement), recycling and reusing of equipment would not be practical.
    vi. Holding control over technology assessment and identification may avoid unnecessary costs and ensure close alignment with practice. However, there were concerns about developing sufficient in-house knowledge to assess fully for solutions.
    vii. Data and monitoring ranked highest amongst the fully insourced options due to the benefits of monitoring in line with social care outcomes and the need to ensure data collected is integrated with other data sets.

22. Following this comprehensive review, supported by CMAS, and recognising our significant financial challenges, **Option Two is the preferred model** of future delivery. Option Two demonstrates growth and improvement in our current offer.

Commissioning and Procurement Approach

---

23. In early 2025 we will hold market engagement events aligned with the Procurement Act 2023 to understand the market appetite for delivering either or both the core service and e-marketplace.

24. Whilst we have a core service model for up to 12 months secured, we will be re-commissioning this as a longer-term contract to ensure compliant procurement with improved contract management. This will be more financially efficient and have costed scalability to ensure growth is managed well.

25. This decision to award a contract will be delivered through a compliant procurement process under the Procurement Act 2023. Amongst other elements, we will take into account:

    i. **Commercial proposition** – opportunities for self-funder market and potential charging policy

    ii. **Ability to deliver locally** – workforce and logistics for installations and responder service

    iii. **Innovation, consultation and learning and development proposition** – understanding the role of the provider to support SCC with innovating in this sector. We will be seeking a provider who can offer a consultation type role to enable us to learn and grow our offer. This will include supporting staff adoption of technology.

    iv. **Social Value** – we will be seeking a provider who can offer social value. This could be through offering free technology learning sessions for residents or access to free technology and connectivity for digitally excluded residents as examples.

26. We expect the core service to be delivered by a number of providers given the bespoke nature of the functions required. Soft market intelligence indicates that there is no one provider offering data analysis, installations, alarm receiving and responder elements. Any consortia will be managed by one lead provider for ease of contract management.

27. We will look to commission the new core service, either in 2025 or 2026, on a 2+2+1-year basis with an option to extend further based on adequate reporting of outcomes and efficiencies and Cabinet approval.

28. Outside of the core service, we will work with Procurement to set-up the flexible purchasing of diverse technology solutions. The e-marketplace will be formed through a compliant process under the Procurement Act 2023 and will enable us to be agile when purchasing individual or multiple technologies. Providers will be contracted (with no guarantee of work) based upon compliance, interoperability, data protection and quality assurance standards as examples.

29. National benchmarking shows that some local authorities make technology enabled free to the recipient, with ongoing licence costs and alarm receiving and responder services sometimes chargeable. We will need to explore in more depth the charging models for technology across LAs and, in tandem with Surrey data analysis, use this to set SCC's own position on charging for different elements of the technology offer.

30. SCC, with or without the provider, will explore the development of a self-funder offer and will take legal advice on this matter at the time. This is an area that many councils utilise to generate a return on their investment or offset service

costs. We know that many residents fund their own care which can lead to complications and costs to the council when circumstances change, or their money runs out. A self-funder offer will involve:

   v. Developing a charging approach
   vi. Developing our commercial model for efficiencies and / or income generation
   vii. Supporting identification of new opportunities for technology
   viii. Overcoming challenges in the market – analogue to digital switchovers
   ix. Maximise new trends and market insights – i.e. agility to switch service providers

31. We are also ensuring TECH is a key component in specifications and tender processes for new buildings-based support developed under the Right Homes, Right Support programme. To enhance opportunities for people to live in Supported Independent Living and Extra Care Housing, we require technology-enabled environments to meet evolving need.

32. A key ambition will be to ensure technology is considered within all new commissioning and procurement activity, much like greener futures and social value propositions. We must also learn from our sector who are often already utilising technology in care delivery.

Prioritisation and Phasing

33. Appendix Five provides a list of the specific MTFS and Newton Europe efficiencies that TECH can support. Based on this, we will initially prioritise the following areas and cohorts:

   i. **Front Door –** promotion and education on how lower-level, widely accessible technology can promote self-management and be part of our core offer. Linking with external resident web pages such as the Home Equipment finder to maximise promotion of tech.
   ii. **Reablement** – growth of the service, improved outcomes for residents and a decrease in ongoing long-term support.
   iii. **Older people** - reduction in care home placements through improved opportunities to return or remain at home with or without care and support
   iv. **Mental Health** – opportunities to explore greater self-management of conditions and reduced long-term support following technology use
   v. **LD&A** – reduction in 2:1 and 1:1 support, increased sharing of waking night support and ongoing support to move from residential settings into supported or independent living

      vi. **Hospital discharge** – this will be a key consideration for integration with health, seeking opportunities to embed technology to improve discharge planning

34. In parallel to these service-specific priorities, we will:

i. Develop improved **information and advice** for staff and residents regarding technology and how it can improve outcomes and wellbeing for residents.

ii. Develop a **corporate communication strategy** – ensuring, where possible, residents, communities and partners understand the relationship between care and technology.

iii. Develop an ongoing **business case** for partner investment opportunities based on staff and resident feedback and improved outcomes reporting.

iv. Given the growth of the technology sector and what we would consider 'common place' technologies in homes and people's lives, we will be launching an information and advice offer to residents. This will have a **'show us what you've got' focus** to ensure people are informed about the capability of their own technology to enhance and improve their lives.

Financial and Value for Money Implications

Core Budgets

35. Core service costs of £632k p/a will continue to be funded from the Better Care Fund (BCF). This currently covers the infrastructure for the monitoring and alarm receiving centre, as well as the Community Responder Service. It also covers Mole Valley Borough Council (current provider) management costs and the provision of a core stock of motion sensors. **Appendix Eight** and **Appendix Nine** cover the full breakdown of MVL costs.

36. BCF funding for group licencing to trial AWHP clients with Brain in Hand (BiH) is currently also held by the TECH team. This supports with the identification of individuals that can benefit from support with time management, independent living, independent travel and improved mental health. Currently, BiH group licence costs are due to run for another 18 months (dependent on Procurement Board approval) with 40 licences funded (+ 5 free from the provider) at a cost of £46k (+ VAT*).* Where social care outcomes are being met by the apps, individuals are then passported onto individual licences funded through locality budgets meaning we can recycle use and support more individuals as appropriate.

37. Following successful pilots, we have transitioned some forms of technology into BAU, for example Just Roaming and HandiCalendar are now being utilised by our teams.

38. While we can cost our core service and plan to incrementally grow our offer through locality budgets, there remain several unknown and hidden costs to fully embed TECH. This is why we must carry 'contingency funding' within the core service model. **Appendix Ten** covers the need for contingency budgets.

39. The financial unknowns will be our potential to explore commercial opportunities such as self-funder services and chargeable cost recovery as well as partner investment. This may provide an opportunity for further investment or for offsetting costs charged by the provider and / or suppliers.

Transformation Funding of the TECH Team

40. The total annual cost of the current TECH team (including 4 TEC advisor roles currently going through recruitment controls) is £506k. A full breakdown of roles can be found in **Appendix Eleven.** Most of the roles are Fixed Term Contracts only, running for 18 months currently. These roles are currently funded out of AWHP's Transformation programme with provision for most roles up to summer 2026. We intend to embed the costs of these roles permanently through achieved efficiencies for the Council, though this will need to be reviewed as part of future years' MTFS budget setting cycles.

Telecare costs

41. Telecare spend in Surrey is circa £225k p.a. currently with £55k paid through the BCF in advance and the rest coming from spot purchasing by teams. A full review of this spend will be undertaken to evaluate the impact of centralising these referrals under the new offer or maintaining this approach alongside.

TECH Growth Via Locality Budgets

42. It is intended that spend will come from locality budgets to grow the implementation of technology in assessed care packages over the next two (2) years.

43. The deployment of TECH through locality budgets will be dependent upon adoption of technology by practitioners. Whilst we will be robust with evaluating the impact of technology for each individual, teams may see a spike in costs with the initial adoption of technology.

44. Recently, Newton Europe diagnostic findings have been built into MTFS assumptions to determine AWHP spend within the 2025-30 period. It is likely that TECH can have a significant impact in the medium to long-term on meeting MTFS targets. **Appendix Five** lists the MTFS targets that TECH play an integral part in delivering.

45. Many programmes will play a part in delivery of these ambitions (embedding strengths-based practice, redesigning the front door etc.). However, there is strong evidence that TECH can support with the delivery of these benefits. This detail can be found in **Appendix Two** of this paper on the evidence of impact. If we extrapolate this data based on the growth in use of technology, significant cost savings and avoidance could be realised.

46. Having a robust technology framework from which to grow and expand will mean any bespoke one-off funding nationally or locally can be deployed with greater agility. For instance, winter pressures or discharge funds as examples.

47. This paper does not seek to make broad judgements on potential spend or efficiencies due to the complexity of modelling uptake and outcomes on an unknown cohort of individuals. Instead, we aim to have demonstrated that improved access, implementation and monitoring of technology will clearly support teams in achieving outcomes and reporting on impact.

48. Further modelling on the range of potential cost avoidance and cost reduction benefits that will support delivery of existing budgeted MTFS efficiencies will be required. To allow this to be done robustly, it is envisaged that this will take place in the new year. This will include the estimated spend profile for TECH in care packages which will provide a range for potential spend based on the number of residents funded by ASC we think could benefit from TECH.

Scale of the Opportunity – Developing a 5 to 10-Year Strategy

---

National

49. It is estimated that by 2027 over 50% of UK homes will benefit from Smart Home technology, including alarms and thermostats. The fastest-growing item is smart speakers.

   a. It is reported that 98% of the UK adult population have a mobile phone. Not all of these will be smart phones, but many will have access to 'off the high-street' applications and AI support. Some will also include health monitoring and emergency response functions.

b. The ONS census of 2021 reported the following:

   i. 92% of adults in the UK were recent internet users in 2020, up from 91% in 2019.
   ii. The proportion of those aged 75 years and over who are recent internet users nearly doubled since 2013, from 29% to 54% in 2020.

iii. The number of disabled adults who were recent internet users in 2020 reached almost 11 million (81%), up from just over 10 million (78%) in 2019.

Local

c. Based on current (financial) data for SCC there are significant opportunities for TECH to support Adults Wellbeing and Health Partnerships (AWHP). Four key areas have been explored initially: Care within the Home, Care Homes, Mental Health and Learning Disabilities and Autism services.

i. For these cohorts, there has been a 3.2% growth from 9,706 cases in 2019 to 10,014 cases in 2024. This is based on ContrOCC export of payments (30th November 2024).

ii. There has been a significant increase in expenditure across these 4 services. There has been an increase of £88.1m, a rise of 27.5% between 2019 to 2024.

iii. Furthermore, expenditure per resident over this period has increased by £7,785, which is a rise of 23.6%. Whilst some of this will be due to socio-economic pressures, some will be driven by the intensity of care packages required.

iv. Mental Health has seen the largest increase in clients, with the service going from 825 cases in 2019 to 1240 cases in 2024 (an increase of 415 cases).

v. When looking at expenditure, Learning Disabilities and Autism is noteworthy due to the increase of £14.3m between 2019 and 2024.

d. These figures demonstrate growing demand for our services and increasing costs. Technology can improve the current landscape but with better data and evidence we can use this to support longer term planning and demand management.

Consultation

50. Since August 2024, the TECH team has been engaging with staff, partners and people who draw on our services to support the development of the service and TECH Strategy.

51. Coproduction groups, boards and forums have supported with the identification of opportunities and challenges and helped to define how we can deliver technology-enabled care and health in Surrey. We are at the early stages of a comprehensive and ongoing coproduction and engagement journey and the TECH service and will be looking to expand and grow the input of all stakeholders into the TECH offer.

52. Over the next 12 months, the intention is to continue to consult and engage as well as to embed BAU structures, such as a TECH Reference Group, where we can test and shape our offer.

53. It has been clear throughout that there is significant interest in technology and a real understanding of the opportunities that technology can offer to improve service delivery and improve outcomes for Surrey residents.

54. Our first engagement day held at Woodhatch Place in November saw over 200 staff meet with technology suppliers, hear from people using technology and take part in strategy development sessions.

55. See **Appendix Seven**, for a list of the coproduction and engagement undertaken to-date.

Risk Management

56. **Locality budgets** – with investment in technology sitting within locality budgets and forming part of someone's care package, there will be an initial rise in spend when technology is purchased for each assessed individual. We must track the benefits carefully through demand management, baselining and measuring outcomes. We need to ensure staff are not disincentivised to recommend technology.

57. **Overall cost for technology and timeliness** – paying for technology through locality budgets, one person at a time, will reduce any economies of scale and bulk purchasing discounts. Over time, and given evidence of demand and need, we would seek to work with services and teams to identify strategic partners and commit to numbers of 'kits, apps or licences' to maximise efficiencies.

58. **Connectivity & Digital Inclusion-** to ensure everyone in Surrey has equitable access to technology, we will continue to work with partners and providers on the digital inclusion agenda in Surrey. For an overview of the work taking place, please see **Appendix Six**.

59. **Practice** – there is a risk that staff will not want to use technology or will feel that this is not their place. Technology can be daunting, and we need to consider the significant impact this can have on our workforce if we do not adequately invest in support. There is also a risk that technology could negatively impact our practice. Social care staff could inadvertently offer technology inappropriately or in place of essential care. We will reduce this risk through training, development and online resources. TECH advisers will enable audits and drop-ins to discuss and review suitability and safety on a case-by-case basis.

60. **District and Borough (D&B) Telecare –** with the lines between telecare and technology enabled care services becoming increasingly blurred, a decision could be taken to cease funding telecare through D&Bs. With the Devolution White Paper, this may be timely. It could enable a more holistic, personalised view of client needs and the technology that could support them. It is also likely to reduce duplication of referral, installation and monitoring. Currently, there is limited reporting on telecare spend and a lack of data on the individual products being deployed and what outcomes are being delivered.

61. **Partner investment** – there is a key risk that partner benefits will be realised through technology, yet partners may not seek to invest. We will ensure the right governance is explored to highlight and evidence the need for complementary investment.

62. **Hidden costs** – TECH is an area where it is difficult to accurately quantify hidden costs. We will undertake risk stratification and identification to understand these as far as we can (for example lost kits, batteries, connectivity and installations).

63. **Reputational risk –** we must manage the messaging around technology, including countering concerns that technology is not safe, is only a savings-led programme or that it is a replacement for essential care delivered by a person. Corporate communications, senior leadership endorsement and case studies will be essential here.

64. **Reliability, continuity and accountability** – there is risk that in some instances technology or connectivity may still fail. This could be a loss of service or potentially faulty equipment causing damage. We will undertake full risk assessments and testing to reduce this risk. We will also hold a technology version of the priority services register to help with natural disasters or unforeseen issues to support continuity of care and the safety of residents in receipt of technology provided by the Council. This will take place alongside education for practitioners around technology risk mitigation within their risk assessments.

65. See **Appendix Twelve** for Interdependencies.

Section 151 Officer Commentary:

66. 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.

67. 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.

68. There will need to be ongoing monitoring of the outcomes and benefits from TECH and learning from the insight built in to plans as they progress. The proposals set out above will need to be fully monitored to ensure efficiencies contained within the MTFS are delivered. Services are expected to manage costs within their budget envelopes and any increases will need to be mitigated.

Legal Implications – Monitoring Officer:

69. This report seeks Cabinet approval for looking at alternative approaches to the delivery of statutory obligations. The Council has duties under the Care Act to provide services to meet the assessed needs of residents. This report outlines how the Council's existing use of technology can be enhanced to deliver support which might otherwise require more traditional solutions such as either a residential placement or multiple daily care visits. All changes to support must however, be led by an individual's assessed needs.

70. At this stage the intention is to engage with likely providers and to procure multiple providers from which the Council can purchase technology aids. Going forward the procurement arrangements will promote economies of scale. 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 such as the Procurement Act 2023) (where appropriate).

Equalities and Diversity

71. The development of the TECH EIA identified many groups that might be affected by the rollout of technology. The list of groups that the EIA identified TECH might impact, positively and negatively, can be found in **Appendix Thirteen**.

72. The recommended outcome that emerged from the EIA was Outcome Two 'Adjust the policy/service/function to remove barriers identified by the EIA or better advance equality.' The TECH team are confident that the proposed adjustments and mitigations listed in the EIA will remove any barriers.

73. The recommended outcome was reached because the TECH service would have an overall strongly positive impact on many of the groups identified in this EIA, in particular older people, adults with a disability, LD&A, SMI or long-term health conditions. TECH has the potential to give these cohorts independence and agency over their own care and support. It can have a positive impact on such areas as independent living, employment, mental health and wellbeing, travel, relationships and safety.

74. It was recommended that we adjust the policy and service to ensure nobody is disadvantaged by technology, particularly those who experience digital inclusion and those living in rural areas. Our technology solutions and service will need to be continually reviewed and refined to make sure different cohorts can engage with and use technology successfully. This may mean shaping new products with provider(s), rolling out additional training or providing bespoke solutions and information, advice and guidance.

Other Implications:

Area assessed:	Direct Implications:
Corporate Parenting/Looked After Children	N/A
Safeguarding responsibilities for vulnerable children and adults	Technology will be used to support safeguarding responsibilities. These could include monitoring and safety technologies for all cohorts of individuals and extend to safety at home and within the community.
Environmental sustainability	We will look to recycle and reuse technology where appropriate to do so.
Compliance against net-zero emissions target and future climate compatibility/resilience	Technology will reduce the need for some care to be delivered in person therefore reducing travel and subsequently the carbon footprint for care.
Public Health	Technology will be used to tackle health inequalities. Both in terms of access to services and in the meeting of someone's personal outcomes.

Timescales & Next Steps

January - February 2025

Issue PIN to market and undertake market engagement on proposed approach to e-marketplace

Continued systems improvement work including benefits tracking and LAS changes & recording

Draft strategy to be complete following coproduction and engagement work

January – March 2025

Recruit (decision pending) TECH adviser roles x 4 for 18 months

Manage partner conversations and seek alignment and investment with ICS colleagues and D&B colleagues – prioritising responder services

Workshops with teams – embedding technology and service priorities

Develop team led business processes and KPI's for each priority service

March 2025

Commence commissioning activities in preparation for e-marketplace

Review first quarter outcomes and KPIs for existing services and pilots

Explore commercial model based upon first quarter findings

June – July 2025

Corporate communications and online web development complete (potentially including self-funder offer) – communication plan in place for staff and residents

July – August

Core service specification development

Procurement options and timelines

September – December 2025

Return to Cabinet with successes and recommendations for long-term TECH model including self-funder and charging model

Activity to begin on core service re-commissioning

January 2026 - April 2026

Review spot purchasing approach to look at efficiencies in commissioning and procurement of 'high-use' technology from locality budgets / BCF

Report Author:

Dan Stoneman, Head of Commissioning Older People and Head of Technology Enabled Care and Homes (TECH)

Dan.Stoneman@surreycc.gov.uk, 07794 497607

Consulted:

Please see Appendix Five for a full list of stakeholder co-production & engagement undertaken by the TECH Team.

Appendices:

Appendix 1: Case studies

Appendix Two: Evidence of Impact- SCC Pilots and D&B Telecare Services

Appendix Three: What is TECH?

Appendix Four: TECH and Social Care

Appendix Five: MTFS & Newton Europe Diagnostic Assumptions

Appendix Six: Work on Digital Inclusion

Appendix Seven: List of Stakeholder Co-Production & Engagement

Appendix Eight: Mole Valley Life Contract Cost Breakdown

Appendix Nine: Motion Sensor Growth Projection

Appendix Ten: Contingency Budget Rationale

Annexe Eleven: TECH Team Roles and Spend

Appendix Twelve: List of Groups Impacted on by TECH from the EIA

Appendix Thirteen: Interdependencies

Sources/background papers:

- TSA - State of the Sector Report 2024
- IT and internet industry - Office for National Statistics
- TECH Enabled Care SCC Discovery Report 2020- Public Digital - Enabling you with technology - Surrey CC discovery final report.pdf
- MTFS (relevant detail in **Appendix Five**)
- Newton Europe Diagnostic (relevant detail in **Appendix Five**)

Appendices

Appendix 1: Case Studies

Learning Disabilities & Autism

Robert is a 25-year-old man with learning disabilities and autism. He enjoys routine, communicates through Makaton and had been living in a residential setting for 7 years under constant supervision from staff. Robert would regularly freeze in one place, often for hours on end. The home unexpectedly served notice stating they could no longer meet his needs. Our LD&A social work team decided to explore supported living alongside our Just Roaming pilot. Working with the provider, technology was used to reduce dependency on care staff and allow Robert to live more independently and with greater privacy during the night. Robert now lives in a self-contained flat, can leave his home with confidence and undertakes new activities within his community. Just Roaming monitoring ensures staff are on hand should Robert become 'stuck' therefore providing proportionate care and support. By reducing care, especially at night, this has dramatically improved Robert's life.

Cost reduction & annual saving of £64,715.05

Older Adults – Hospital Discharge

Rita was receiving 3 calls a day before going into hospital. The hospital initially advised that Rita required a residential placement on discharge. Support from the Technology Enabled Care Team meant Rita could go home with 4 calls a day alongside smart plug and motion sensors. Rita's family do not live close by, and they had concerns about her being home alone with a high risk of falls. The data showed this wasn't the case, relieving the family's anxiety as well as increasing Rita's confidence to decide on how she would be cared for and supported. Rita's support has since been reduced to an appropriate level of care.

Cost avoidance & annual saving of £18,246

Older Adults – Cognitive decline

Risha's home is her sanctuary, it is very important to her as are her 4 cats. Rishna is in her mid 70's and has been diagnosed with Alzheimer's disease. Rishna's family live at a distance, and it was clear to them that she was having difficulty with her memory and the house was becoming uninhabitable due to the level of hoarding by her ex-husband. Rishna was not managing her personal care and was putting her safety at risk by not consistently locking her front door and leaving it open.

Locality Duty team assessed and recommended 4 calls a day along with technology in the form of motion sensors, smart plugs and a video doorbell.

Rishna's carers were actively involved and used the dashboard to review the data from the motion sensors and monitor her in between care calls. Through tactful use of data, they could call and prompt Rishna to eat and drink in and close the front door between care calls.

The use of technology provided evidence that Rishna was sleeping well with improved nutrition, increased mobility and no evidence of nighttime needs. It also provided evidence that she would access the fridge at least four times a day, use a kettle at least twice, and use the microwave at least three times per day.

As a result, Rishna was able to live a fulfilling and independent life in her own home with just **one daily care call**.

Annual cost avoidance of £15,768.48.

Mental Health – Brain in Hand App

Carlie is a 40-year-old woman who self-referred to a Locality Mental Health Team. She has a diagnosis of Autism and reported struggling with day-to-day activities following a car crashing into her house which triggered severe Post Traumatic Stress Disorder. Carlie made many calls to Crisis Line to seek help and was referred to the Home Treatment Team (HTT) and Enabling independence service in SCC. Carlie had great difficulty building a rapport with both teams. She needed a lot of reassurance and was expressing suicidal thoughts when she spoke to her keyworker.

A referral was then made to Brain in Hand (BiH) and within two weeks of the App licence being activated her keyworker reported an almost complete cessation of phone calls to the team. Carlie reported that using BiH "put her in charge" and that, of all the support that was offered, Brain in Hand was the most effective for her. She stated that she felt it wasn't patronising and helped her to calm down "in the moment." Carlie used the BiH diary and found that this was the most helpful part, as in fight or flight situations it gave her the opportunity to reflect on previous episodes and look at what helped her. She didn't have to rely on her memory. Carlie found the accessibility of Brain in Hand another highlight with someone on hand whenever she needed it. The fact that she had a support plan in place with BiH lessened the need for her to repeat her history on the times she did need to speak to someone.

For a video example of the use of **Brain in Hand** with a client in the Transition team click on this link**: Helpful technology - Preparing for adulthood - Surrey County Council**

Further case examples can be found here: Technology enabled care: Surrey Connected Care - Surrey County Council

Appendix Two: Evidence of Impact- SCC Pilots and D&B Telecare Services

- Our initial TECH pilots have demonstrated that we can have an impact across many services. We have been able to demonstrate cost savings, better care outcomes for residents, carers and families and the ability to assist with meeting growing demand.
- For this section we have differentiated between telecare services provided by District and Borough Councils (D&Bs) and our own technology pilots. SCC staff and our front door services will often refer to local telecare providers and pay for these services.

Scale

- The cost of our various pilots and the number of people supported within these pilots can all be seen below:

Technology and description	Costs	Funding	No. of licences / people supported
Just Roaming Motion sensors within properties with staff on site distributing support when required thus allowing greater level of independence and shared 1:1 support	£21,000 (1 year pilot)	Transformation Funding	6 people supported
Handicalender A calendar which allows personalised pictures, photosymbols and breaking down tasks to tick off	£3,600	ASC/BCF	30 licences / 31 people supported
Brain in Hand An app which allows for personalised routines, prompts, coaching support, monitoring of mood levels and solutions for situations e.g. breathing techniques.	£81,840	BCF	MH- 30 licences /44 supported TR - 30 licences /70 supported
Mole Valley Life (MVL) extended 2024 Provide an alarm receiving centre responding to motion sensors & smart devices within the home. Assists with right sizing support and proactive monitoring	£516,000	BCF	**156** licences –**696** total number of rereferral in the last 3 years **1512**- responder service users (July 2023-June 2024)
Autonome – Transition and LD&A: And app to aid neurodivergent and LD individuals to develop skills for independent living and employment. Videos with step by step direction to complete daily living tasks	£75,607 (1 year pilot starting 2024)	ASC	50 licences (new service)
Smart Homes (Pilot ended March 24) Smart plugs, light bulbs, Ring doorbells, Acti check watches and GPS trackers with geo fencing to encourage safer independent living	£80,800	NHS funding stream	20 people supported
D&B Community care alarms & Telecare and various spot purchase	£166,856	ASC/BCF	625 people supported
TECH Team 2 year fixed term staff	£1.1m (over 2 years)	Transformation funding	10 staff members

- Telecare had 598 unique clients in 2024, the breakdown of teams accessing the offer can be found in the table below. In 2023, over 12 months, Zendesk recorded 288 referrals were made for telecare through our information and advice service. This number is surprisingly low given how many people, and carers, could benefit from simple technology solutions such as pendants, alarms and other widely available technologies.

Team	Number of Clients	Percentage of Total
Older People	257	43%
Physical Disabilities	231	39%
Learning Disabilities	77	13%
Mental Health	31	5%
Carers	2	<1%
Total	**598**	

Savings & Avoidance in our Pilots

- Although our pilots only provide a modest data sample our recently improved motion sensor cost savings tracker is demonstrating more clearly the impact of our offer.
- Total cost savings and avoidance for the motion sensor offer alone from April 2024 to September 2024 inclusive (6 months) was £352k. Motion sensors are currently making an average annual cost avoidance on a case-by-case basis of £13k.
- The Responder Service reduces hospital admissions and ambulatory conveyance to A&E. It is currently also funded through the Mole Valley Life motion sensor contract. Between July 2023 to June 2024, calculating on 5% of falls resulting in a hospital stay with an average length of stay of 10 days, the Community Wellbeing Responder Services gives a ROI of £2.11 for every £1 spent. That equates to a cost avoidance of £426k. Proportionate funding with health will be explored in the new year.
- TECH is also supporting the rightsizing and avoidance of more costly care packages:
  - The motion sensor feedback form indicates that residential care would have been the anticipated level support in 12% of responses with Nursing care anticipated for a further 2% without it. A potential 14% avoidance in terms of escalation to residential or nursing care across a wider sample size would have a significant impact on meeting MTFS targets (Appendix Four lists the MTFS targets that TECH can help meet).
  - When looking at the listed impacts that motion sensors delivered as part of the same form, responses indicate that the provision "prevented/delayed admission into a care/nursing home" on 77 occasions average saving?
  - Motion sensors prevented the need for nighttime support in 52 cases.
  - Temporary or short-term admission into care/nursing homes was prevented in 14 cases.

Care outcomes

  - While financial-based savings are a significant factor for further investment and growth in the TECH programme, there are also other clear benefits to residents, carers and families when technology is used as part of someone's care package. Qualitative data collected from the cost savings tracker and motion sensors feedback forms shows:
  - 46 replies indicated people felt technology benefited their lives as opposed to just 9 cases that said there was no benefit.
  - 63% of responses have indicated that the carer or family has benefitted from TECH (189 replies for yes compared to 111 for no)
  - 91% of cases from the motion sensors tracker answered the question indicating that TECH was at least able to partially meet the needs of individuals (63% of responses said yes with 28% saying partially).

Appendix Three: What is TECH?

- For the purposes of this report, Technology Enabled Care and Homes (TECH) encompasses equipment, installation, monitoring, alarm receiving and responder services. It will be intrinsically linked to digital, AI and corporate transformation programmes including financial savings targets and long-term cost avoidance.
- Technology for Surrey County Council will be focused on supporting outcomes for residents across all care pathways, inclusive of community and hospital discharge arrangements. The model will complement medical technology models.
- SCC will focus on devices such as (but not limited to) motion sensors, wearable technologies, falls monitoring devices, apps, digital calendars and planners, visual guidance systems and home-enabled technologies such as voice activated devices and equipment. Personalised solutions will achieve results in four main areas:

Prevention → Assessment and Monitoring → Reducing care dependency → Long-term support

- It is important to note that TECH does not simply refer to equipment. It is the availability of technology, the adoption by the individual, the reliability, the use of the data insights and the action taken to address these which is often lost when technology is discussed.

Appendix Four: TECH and Social Care

- The Adult Social Care Practice Framework states that Councils must take a strength-based approach to social care. Through our pilots and existing national work, we know personal outcomes can be enhanced by appropriate technology and data insight.
- The Care Act 2014 places a 'statutory duty on councils for prevention, information and advice'. Whilst the Act does not explicitly describe LAs paying for these services, many authorities make technology 'free' to the user recognising it meets this duty.
- TECH enables people to have greater choice and control to self-direct their care but also supports the Council in meeting increasing levels of demand and financial pressures. Technology is also proven to help manage individuals who present with comorbidity and more complex needs.
- The scale of culture growth required to become a technology-enabled, high performing council cannot be underestimated. Staff adoption is critical to the successful implementation of technology. Whilst staff should not need to become 'experts', they will need to understand how to make appropriate referrals and, in some instances, understand how to install, monitor and review as part of someone's package of care.
- Through clear prioritisation we will, with our identified partner(s) lead incremental growth with appropriate publicly available information, advice and guidance. Technology must be a core part of staff induction and be embedded in practice, assessments, recording and reporting.
- We have arrived at seven (7) main social care outcomes to be achieved by our offer:
    - **Prevent, reduce and delay** the need for care or health intervention – including a clear offer for self-funders and a focus on escalating needs e.g. delaying care home entry.
    - **Assess** during crisis to ensure level of care is appropriate and not 'over-prescribed'.
    - Provide **confidence** to residents, their families and carers and social care staff that individuals can manage their own needs and outcomes through technology.
    - **Ongoing review** so that care and support is proportionate as needs change.
    - TECH becomes a core part of someone's **assessed care package**, or self-directed support through direct payments and personal budgets, reducing the need for 'hands-on' regulated care that could be better used elsewhere and for people with higher needs.
    - Improve **access to care placements** by managing risk in formal care settings and within someone's home, creating environments that maximise outcomes for residents and staff.
    - **Reducing cost** to the sector by reducing commissioned hours of support, formal placements and enabling the sector to better support increasing complexity of need.

Feedback from staff, partners and residents will also shape our approach:

Reliability and ease of access – Encompassing both staff being able to identify technology that will support residents and the deployment of that technology at speed. This will mean fundamental changes to practice, systems and recording.

Acceptance and culture – Staff want support from managers to promote technologies, sometimes on occasions where this improves outcomes beyond a 'basic' package of care. Staff also want to ensure residents, families and carers are receptive to technology.

Systems and integration – Staff want reassurance that health and social care, and their respective systems, will work together to promote technology and meet needs whilst respecting data privacy and safety.

Clarity of roles and responsibilities - It's important that people assessing and recommending technology truly understand how it can meet social care needs. Training, guidance and information need to be available to support adoption of technology. Where necessary, staff need to feel confident in installing and utilising technology themselves

Bespoke solutions –Technology must be aligned to someone's personal outcomes and situation. We will be, as far as possible, technology agnostic and not simply fit people to available technology. Technology will also not be suitable for everyone.

Continuity and reviews – We must not assume that once technology has been identified and implemented our work is done. There needs to be a clear support offer to ensure people can continue to use their technology and to check if it remains relevant and appropriate as needs change. Clarity over social care staff roles will be essential.

Appendix Five: MTFS & Newton Europe Diagnostic Assumptions

Older people:

- 27% of new residential (£908 average cost) packages receiving home care (£544 average cost) instead.
- 20% of new spot home care packages receiving 7.1 hours less. £3.6 of savings delivered during MTFS period.

Mental Health:

- 32% of new spot residential (£1,648 average cost) packages receiving home care (£361 average cost) instead.
- 24% of new spot supported living (£577 average cost) packages receiving home care (£343 average cost) instead.

LD&A

- 7% of new spot supported living (£1,019 average cost) packages receiving home care (£679 average cost) instead.
- Strategic shift from residential to supported living to create efficiencies of £1.5m during MTFS period.
- £8.4m savings included over the MTFS period for setting-based reviews, including residential and supported living.

Reablement

- Increase the effectiveness of all reablement services by 63% (from 4.3 to 7 average hours of support reduced). Could realise savings of £9.6m during MTFS period.

Appendix Five: MTFS & Newton Europe Diagnostic Assumptions

Appendix Six: Work on Digital Inclusion

- Digital infrastructure coverage is being improved across Surrey and the deployment of digital infrastructure is the responsibility of several organisations and providers. More than 80% of full fibre in Surrey will be installed through commercial rollout plans and a list of all Surrey locations and the fibre suppliers working in that area are listed in this link: Digital infrastructure coverage in Surrey - Surrey County Council. In Surrey, the District & Borough Councils are supporting the switchover from analogue to digital and liaising with providers.

- The Government's Project Gigabit Programme is addressing homes and businesses that won't be connected by commercial suppliers. Gigabit Coverage is increasing all the time in Surrey mainly by Openreach and VMO2. The Government's ambitions are 85% gigabit capable coverage by 2025 (Surrey are almost there) and 99% by 2030. The urban areas are likely to have higher coverage now because they are more commercially viable, so the suppliers have connected them first.

- It is important to note that we do not need gigabit for the deployment of technology in homes, just 10Mbps is needed to deliver TECH option. Only 0.28% of Surrey do not have access to the level of internet that we would need to be able to put in TECH options using *fixed* internet (i.e. via some kind of cable that comes into your home), and the vast majority of those we could cover with 4G or 5G modems. As such, we really do not have a coverage issue that is limiting our ability to deploy TECH.

- The Government is also investing in the **Shared Rural Network** which is a £1 billion government deal with the four main Mobile Network Operators that will include both private and public investment in a network of new and existing phone masts closing 'not-spots' and levelling up connectivity across every corner of the UK. The Programme will deliver 95 percent 4G coverage to UK landmass by the end of 2025.

- The Economy & Growth Directorate in Surrey County Council are supporting work on digital infrastructure coverage in Surrey. The Technology Enabled Care & Homes (TECH) Team is also working closely with our technology partners to boost connectivity within homes by supplying boosters, modems and connectors. Using TECH programme insights and working with IT&D and Economy & Growth, we will continue to look at how we can boost access and speed up connectivity.

- It should be noted that Surrey County Council has TECH advocates appointed to support SCC staff with knowledge and training. Furthermore, Surrey County Council funds Surrey Coalition to run the TECH Angels service: Tech Angels - Surrey Coalition of Disabled People. The TECH Angels provide devices, digital literacy training and confidence-boosting support to people in Surrey who are most at risk of digital exclusion.

Appendix Seven: List of Stakeholder Co-Production & Engagement

- **Select Committee Adults and Health Budget Deep Dive session:** TECH budget deep dive taken on 18th September.
- **TECH Engagement Day** hosted on the 12th of November. Staff, partners and providers were invited to Woodhatch to be part of strategy engagement sessions, Q&A panels and show and tell stalls. Some carers and clients were also invited to be part of the Q&A panels and share their experience of using technology in Surrey.
- **Autism Reference Group** attended on the 19th of September. This was an opportunity to engage with adults with autism in Surrey. We asked attendees about the technology they were currently using in their lives and how it was supporting them. We talked about the areas of their lives they thought technology could be most beneficial for and the opportunities and challenges for technology to support them in those aspects of their lives.
- **Autism Partnership Board** on 17th October. Engaged with AWHP senior managers as well as partners, providers and some adults with autism on the development of the TECH Service and Strategy. Discussion was focused on opportunities and challenges for growing the deployment of TECH in Surrey, where we should focus attention for autistic adults and how we could overcome barriers to deploying TECH successfully.
- **Learning Disability Partnership Board** attended 5th December. This is a mixed forum of AWHP senior managers, partners, providers, adults with LD and Member and HWB Chair Bernadette Muir. Similarly to the Autism Partnership Board, the conversation was focused on opportunities and challenges for growing the deployment of TECH in Surrey, where we should focus attention for adults with learning disabilities in Surrey and how we could overcome any barriers to deploying TECH successfully.
- **Directorate Equalities Group (DEG)** was attended on the 19th of November. The DEG is supporting with the review and sign-off of the TECH EIA. On the 19th, we explored how TECH could align with SCC's work on inclusion and equality and considered challenges and opportunities for different groups in Surrey and how technology can support these groups.
- At a regional and national level, we continue to engage with organisations and networks such as **SE ADASS, TSA and LGA.** We have also worked closely Hampshire County Council to understand their technology journey and current model. As part of the national and regional networks, we are exploring our strengths and gaps and identifying areas of good practice across the country. A LGA self-assessment was completed for AWHP digital and technological capability in early December.
- **OT Conference** – Senior Operations Manager in the TECH team presented on the 17th of September "Technology and OT – The New Era" showcasing the direction of travel and opportunities for technology and receiving feedback from OTs across health and social care for areas of focus and challenge.

Appendix Eight: Mole Valley Life Contract Cost Breakdown

- Circa £516,000 p/a – although prices are variable given replacement technology costs, batteries and over 50% of residents referred requiring internet access (modems / routers)

Service	Cost
Referral and installation	£85,000
Proactive and Urgent Alert Monitoring	£45,000
Management and Staffing	£45,000
Equipment and Licences	£64,000
*Community Wellbeing Responder Service	£202,000
Routers, Modems and Variable costs	Approx. - £25,000
Contingency funding – replacement kits, batteries, maintenance	£50,000

Appendix Nine: Motion Sensor Growth Projection

Growth projection illustration – Motion sensors*		
Service / equipment	Cost per unit (one)	Per 100 people
Motion sensor equipment	£600 (High value multiple sensors)	£60,000
Licences	£29 p/m (rising to £40p/m from 2025) £348 p/a (£480 from 2025)	£34,800 (£48,000)
Monitoring	£15 p/m £180 p/a	£18,000
Maintenance Visits	£45	

Appendix Ten: Contingency Budget Rationale

- Kit replacement due to loss, failure, damage or long-term use
- Connectivity – there may be instances where costs for sim cards or broadband access may need to be met for people to utilise technology solutions
- Staffing costs- we may see the need for more operational dedicated staff to manage a larger service. Currently there are 4 costed TECH adviser roles.
- Systems and data costs will be incurred if we need to make changes to improve referrals, use, monitoring and reporting.
- The more technology we have the greater the potential for growth in logistics such as numbers of installations.
- Ongoing committed costs – long-term licences for technologies will require funding alongside new business growth and simple costs such as battery replacements will increase with service growth.
- We do not currently know what commercial opportunities there may be for the council and the technology partner(s) to improve or reduce the budgets proposed. We will also develop a self-funder and client charging model which must be balanced with

affordability for all parties to prevent this becoming a barrier to improving outcomes for both the Council and our residents.

Appendix Eleven: TECH Team Roles and Spend

Job Title	Grade	FY Cost
Senior Commissioning Manager	PS13	£88,994
Senior Manager (operations)	PS13	£88,994
Senior Practice Lead - Practice Improvement	PS11SC	£65,599
Project Officer	PS9	£50,698
Technology Enabled Care (TEC) Advisor	PS9	£50,698
TEC Advisor - East	PS7	£40,271
TEC Advisor - West	PS7	£40,271
TEC Advisor - MH / Reablement	PS7	£40,271
TEC Advisor - LD&A & Transitions	PS7	£40,271
Total		**£506,067**

Appendix Twelve: List of Groups Impacted on by TECH from the EIA

- Age including younger and older people
- Disability
- Gender reassignment
- Race including ethnic or national origins, colour or nationality
- Sexual orientation
- Members/Ex members of armed forces and relevant family members
- Adult and young carers
- Those experiencing digital exclusion
- Those experiencing domestic abuse
- Those living in rural/urban areas
- Those experiencing socioeconomic disadvantage
- Adults with learning disabilities and/or autism
- People with drug or alcohol use issues
- People on probation
- Adults with long term health conditions, disabilities (including SMI) and/or sensory impairment(s)
- Older People in care homes
- Gypsy, Roma and Traveller communities

Appendix Thirteen: Interdependencies

- We will need support from our Principle Social Worker and policy teams to ensure our technology offer is commensurate with our statutory duties.
- We will work with the Multi-Disciplinary Team work led by the corporate Design & Transformation Team.
- We will work closely with colleagues and partners on the digital inclusion and connectivity agenda. See **Appendix Six** for examples of work taking place to address digital exclusion.
- We will need support from business systems and digital teams to ensure LAS recording and reporting enables technology to be captured and reported on.
- Business intelligence and contracts, commissioning and support service will need to assist with tracking information, capturing KPIs and collating information via Tableau. This will support business case development and outcomes reporting.
- We are working with Finance to look at costing and tracking technology outcomes.
- With technology use and potential charging, we will be seeking ongoing support from legal to ensure compliance and risk mitigation.
- IT&D colleagues and IT business partner will need to support with compliance assurance and technology suitability. This will include assurance of connectivity, reliability and digital inclusion.
- I&A, web and corporate communication colleagues will also be key to developing a clear vision for technology that is communicated successfully to both staff and residents.

Equality Impact Assessment

EIA for Technology Enabled Care & Homes Service

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

Yes

1. Explaining the matter being assessed

- Change to a service or function
- A new strategy or policy

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

The Technology Enabled Care & Homes (TECH) Service is seeking to develop and implement an enhanced offer of technology to individuals funding their own care and eligible adults and young people in transition within Surrey. A piece of discovery work commissioned by Surrey County Council (SCC) into the technology landscape in Surrey delivered by Public Digital in 2020 showed that there was an opportunity to maximise technology in order to support people's independence. The TECH Service subsequently designed and piloted a TEC offer with the objective to leverage rapid advances in the sector and reduce high-cost packages of care in instances where technology could enable greater independence at home.

In April-July 2024, a change in leadership of the TECH team presented opportunities to review and consider the expansion of the current TECH offer to ensure that SCC is fully utilising technology to meet the needs of various cohorts across AWHP. The review looks to move from bespoke and targeted pilots towards an integrated model of TECH delivery across AWHP.

As part of the expanded and integrated offer, a strategy will be developed as well as new specifications for TECH services in Surrey. This will allow SCC and its partners to capitalise on technology solutions that will enable independence, choice, control, dignity, connection and safety for Surrey residents. Technology will be bespoke, flexible and inclusive to address the diverse needs of different cohorts.

Stakeholders will experience a more personal TECH offer with more bespoke solutions and products for people with care and support needs. Practitioners will find the technology offer easier to navigate and understand and will be able to easily implement technology solutions for their clients. SCC will also work more effectively with its partners and providers to jointly identify, implement and fund technology solutions.

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

- 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.
- Journeys across the county are easier, more predictable and safer.

Equality Impact Assessment

12

- Everyone has a place they can call home, with appropriate housing for all.

In particular, TECH will:
- Enable residents to achieve the outcomes they want through more personalised and independent solutions to their health and care needs ensuring no one is left behind.
- Support our economy by working with local suppliers and services to maximise opportunities for business growth, employability and service sustainability.
- Tackle health inequality driven by demographic challenges that can cause inequitable access to services and support.
- Reduce the need for staff, carers and families to travel to deliver low level care and support tasks.
- Empower greater connectivity and social movement, ensuring people can remain at home and access and contribute to their own communities, for longer.
- Embrace the power of technology and data insights to ensure we can identify areas of high performance and maximise these for the benefit of our residents, the Council and our partners.

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

- County-wide

Assessment team

Detail here who you have involved with completing this EIA. For each include:

- Barbara Anu, EDI Manager for Adult Social Care
- Kathryn Pyper, Chief of Staff, Adult Social Care - EID lead for Adult Social Care
- Ryan Mckeaveney, Performance Data Analyst, AWHP
- Dan Stoneman, Head of Commissioning for Older People, AWHP
- Mikaela Wall, Senior Manager for TECH, AWHP
- Consultation and engagement with key stakeholders and groups has taken place to inform this EIA, including: Autism Reference Group, Autism Board, LD&A Partnership, the Directorate Equalities Group and attendees at the TECH Engagement Day.

Equality Impact Assessment

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

1. Age, including younger and older people (and older people in care homes)

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

The usually resident population of Surrey, counted by the 2021 Census, was 1,203,108. This represents an increase of 70,718 (6.2%) since 2011. The largest 5-year cohort across Surrey are those aged 50-54 years, with a population of 87,327. The fastest growing cohort compared to previous census are those aged 70-74, with a growth of 34.1% (an additional 14,869 persons. Other older-age groups have also increased - those aged 75-79 by 18.1%, and those aged 80 or older by 14.6%. The overall effect of this is that Surrey's population is made up of a large and growing proportion of people aged over 70. Surrey residents also have longer life expectancies than the South-East as a whole and the South-East has longer life expectancies than the rest of England.

A key focus of our TECH offer is on Surrey adults in need of care and support and in particular the elderly, more frail cohort who can benefit from support to live more independently at home with more dignity, choice and connection. Benefits so far show that technology such as remote monitoring sensors can provide older, frail people with the confidence to remain at home for longer. The service will therefore have a positive impact on Surrey's elderly population. A focus on the elderly, frail population will remain a key part of the future offering as we know that this is a group where the impact of TECH to live more fulfilling, independent lives can be significant.

Apps and smart home equipment have been piloted in other cohorts across AWHP but more work is needed to ensure we are using technology to support adults of all different ages in Surrey with the challenges and barriers they face, including working age adults.

In addition, as part of the TECH offer, it will be necessary to consider the differing levels of digital-awareness and inclusion across different ages. The possession of, for instance, smart phones, will differ across age groups and therefore reduce the ability of some people to interact with the technological solutions. Furthermore, internet connectivity and access is reduced in more rural areas of the county with, generally, an older population living in these areas. Work will therefore need to take place to make sure that age is not a factor in access to certain pieces of technology.

TECH will also look at the transition cohort the potential for children's services to benefit and access offer, including young carers and neurodivergent young people transitioning to adult services, for instance. Their unique needs will be considered in the delivery of technology.

In terms of older people in care homes, TECH offers an opportunity to right size packages of care and may therefore reduce dependence on expensive residential home care for those who are elderly and frail. Bringing technology into packages of care may therefore mean that there are fewer older people in care homes and an increased number of older people living in supported or independent living facilities.

For those in care homes, technology can help to prevent and manage falls, as well as monitoring for any signs of deterioration. Furthermore, technology can reduce the possible intrusion of staff and allow for more dignity and choice for the individual. However, an important consideration is the fact that older people may value face-to-face care and the interaction and connection this brings. In these instances, technology could therefore impact negatively on an individual's life. We will need to be mindful in our technology offer of the need for personal and bespoke solutions that match individual need.

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

A key part of the development of the TECH Strategy and of the new specification will be the consideration of opportunities available for TECH to support cohorts of all ages in Surrey. This will

Equality Impact Assessment

ensure that technology benefits a broad range of adults of all ages in Surrey. The Strategy is being drafted currently and the new specification is likely to be in place by September 2025. The TECH Team will be responsible for delivering these activities.

We aim to provide opportunities for Surrey residents of all ages to access technologies that help them to achieve specific outcomes. We will tailor processes and information for specific learning needs but the offer will be inclusive to all ages.

The TECH team will be working with other teams and partners to address digital inclusion and connectivity across Surrey, particularly in rural areas. The provision of additional technology (routers and modems) and training will be considered to support these initiatives. This provision and training will take into account the specific needs of Surrey's older population.

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?

The TECH team are working closely with other teams and with partners on initiatives such as:

- The development of increased extra care housing and independent living facilities to reduce dependency on care homes.
- The discharge to assess model, including the Virtual Ward initiative (Surrey Heartlands).
- Digital inclusion
- Digitising social care with NHS partners
- Corporate Transformation across Older People, Reablement, Mental Health and Learning Disabilities & Autism and Transition
- Own systems design and transformation – Liquidlogic Adult's Social Care System/Tableau

Any negative impacts that cannot be mitigated?

No. The only negative impact is digital exclusion and availability. These are mainly financial or logistical. We can plan for these with clearly thought through finance proposals and a specified service that is inclusive of all areas of Surrey and all appropriate residents based upon eligibility and technology suitability. We will maximise social value in council contracts and improve information and advice services to overcome any negative impacts of technology adoption based upon access and availability.

Equality Impact Assessment

2. Disability

12

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

In the 2021 census, 5.1% (61,835) of the population in Surrey were classified as disabled under the Equality Act where their day-to-day activities were limited 'a lot' and 8.7% (104,266) of residents were classified as disabled under the Equality Act, whereby their day-to-day activities were limited 'a little'. The table below shows the number of people supported by Adult Social Care by primary reason for support, as can be seen, learning and physical disabilities make up a significant percent of ASC cases.

Primary Support Reason	Number of open cases (27 Nov 2024)	% of open cases (27 Nov 2024)
Learning Disability Support	4,137	17.1%
Mental Health Support	2,984	12.3%
Physical Support - Access and Mobility Only	1,911	7.9%
Physical Support - Personal Care Support	8,261	34.2%
Sensory Support - Support for Dual Impairment	51	0.2%
Sensory Support - Support for Hearing Impairment	104	0.4%
Sensory Support - Support for Visual Impairment	129	0.5%
Social Support - Asylum Seeker Support	5	0.004%
Social Support - Substance Misuse Support	138	0.6%
Social Support - Support for Social Isolation/Other	199	0.8%
Social Support - Support to Carer	3,479	14.4%
Support with Memory and Cognition	938	3.9%
Unknown	1,845	7.6%
Total	**24,181**	**100.0%**

Our current TECH offer is enabling people with disabilities to live more independent and connected lives. Technology has the opportunity to remove some of the many barriers that prevent adults with disabilities from living a 'normal' life. For instance, smart home, falls pendants and GPS location technology are offering people with disability more freedom and independence and reducing the intrusion that can be caused by staff.

However, as part of expanding and growing our TECH offer, SCC needs to be maximising opportunities to support those with disabilities by understanding the diversity of need and the availability of technology to meet these needs. Technology will need to be adaptable to truly support individuals with disabilities in Surrey and deliver care and support that makes a difference to their goals and aspirations.

Furthermore, as we implement technology solutions across various cohorts (for instance elderly residents), we will need to continue to consider any additional needs (for instance hearing or visual impairments or reduced mobility) that may make interacting with the technology more complicated. Any accessibility challenges will need to be addressed, for instance for those with cognitive and sensory impairments. It should be noted that disabilities intersect with other protected characteristics (such as age, race and socioeconomic status) potentially creating compounded barriers to access which will need to be addressed.

Equality Impact Assessment

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

For our strategy and specification development, we will ensure we consult and engage with adults with disabilities in Surrey to understand the challenges and opportunities of TECH for this cohort. It is key that we hear directly from people with lived experience about what matters to them and how TECH can support their lives.

The TECH team continues to work with providers to make changes to products and services to best meet the needs of residents, including those with disabilities. Kits can be adapted for different needs and circumstances and this will need to be an ongoing dialogue.

Work is also needed with providers and practitioners to ensure that TECH is trusted to improve outcomes and that individuals can make the most of the freedom and independence that TECH can offer.

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?

- Digital inclusion
- Digitising social care with NHS partners
- Corporate Transformation across Older People, Reablement, Mental Health and Learning Disabilities & Autism and Transition
- Own systems design and transformation – Liquidlogic Adult's Social Care System/Tableau

Any negative impacts that cannot be mitigated?

No. Same as previous regarding digital inclusion. Also, some disabilities may require higher cost and more complex solutions.

3. Gender Reassignment

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

There is a need to consider how TECH might support those who are undergoing gender reassignment or who are experiencing uncertainty around their gender. In particular, adults with autism are more likely to undergo gender reassignment. TECH currently is playing a role in meeting the social care and health needs of those with LD&A in Surrey but there is more to do to grow the offer.

Those who are undergoing gender reassignment may also be living with or experiencing mental health symptoms and technology can support with crisis management as well as the development of coping techniques and strategies to aid with self-management. It may be that technology can also help connect those undergoing gender reassignment to communities and networks of those going through the same experience.

We also need to ensure that the TECH we commission and offer is accessible and inclusive to all, including by working with providers and partners to overcome any additional barriers that might be in place for those undergoing or who have undergone gender assignment. For instance, in terms of privacy, dignity and communication.

Equality Impact Assessment

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

Consider the needs of those undergoing gender reassignment and whether TECH can play a role in meeting those needs. Explore with all adult social care teams the numbers undergoing gender reassignment in their services and whether TECH can add meaningful support.

Work with providers and partners to overcome any additional barriers that might be in place for those undergoing or who have undergone gender reassignment.

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?

- Corporate Transformation across Older People, Reablement, Mental Health and Learning Disabilities & Autism and Transition

Any negative impacts that cannot be mitigated?

No.

4. 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.

There is a need to consider how technology will work for those that speak other languages and may have difficulty communicating in English. In particular, in terms of instructions for usage, the alarm receiving centre and community responder service. Interpretation and/or translation services (included translated written materials) may be required depending on demand and need.

Furthermore, there is also a need to ensure that technology solutions are culturally appropriate and to co-develop culturally sensitive training and communication materials, incorporating feedback from community leaders and advocacy groups representing ethnic minorities in Surrey. As examples, residents from certain backgrounds may be more likely to live in intergenerational housing or to want to care for their loved ones in their own house. Technology may also be perceived differently by people of different ethnicities. Communication and engagement may therefore need to be adapted and practitioners and providers may need to work differently with these residents.

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

Equality Impact Assessment

For our strategy and specification development, we will ensure we consult and engage with adults of different races in Surrey to understand the challenges and opportunities of TECH. It is key that we hear directly from people with lived experience about what matters to them and how TECH can support their lives.

The TECH team continues to work with providers to make changes to products and services to best meet the needs of residents, including those from different races. Kits can be adapted for different needs and circumstances and this will need to be an ongoing dialogue.

Work is also needed with providers and practitioners to ensure that TECH is trusted to improve outcomes and that individuals can make the most of the freedom and independence that TECH can offer.

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?

- Corporate Transformation across Older People, Reablement, Mental Health and Learning Disabilities & Autism and Transition

Any negative impacts that cannot be mitigated?

No.

5. Sexual Orientation

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

There is a need to consider how TECH might support adults who may be uncertain about or struggling with their sexual orientation. The LGBTQ+ community may also be living with or experiencing mental health symptoms and technology can support with crisis management as well as the development of coping techniques and self-management strategies. It may be that technology can also help those who are struggling to connect with communities and networks of those going through the same experience.

We also need to ensure that the TECH we commission and offer is accessible and inclusive to all, including by working with providers and partners to overcome any additional barriers that might be in place for the LGBTQ+ community. For instance, in terms of privacy, dignity and communication.

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

Equality Impact Assessment

12

Consider the needs of those who are uncertain about or struggling with their sexual orientation and whether TECH can play a role in meeting those needs. Explore with mental health colleagues whether there is a specific need for the LGBTQ+ community for TECH to address.

Work with providers and partners to overcome any additional barriers that might be in place for the LGBTQ+ community. Incorporate consultation with SCC's LGBTQ+ staff network to ensure their specific needs are captured and addressed.

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?

- Corporate Transformation across Older People, Reablement, Mental Health and Learning Disabilities & Autism and Transition

Any negative impacts that cannot be mitigated?

No.

6. Members/Ex members of armed forces and relevant family members

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

There is a need to consider how TECH might support members and veterans of the armed forces, in particular in terms of mental health, loneliness and isolation and to support with any disabilities and/or health conditions that they may have. TECH can provide support for those with anxiety and depression by offering crisis management as well as the development of coping techniques and self-management strategies. Smart Home, motion sensor and traditional telecare technology can offer enhanced independence, safety and connection to their community for those that may need extra support to live

Equality Impact Assessment

independently. Environmental controls and assistive technology in the home can facilitate independent living and improved quality of life of life, helping to meet the needs of any physical disabilities.

We also need to ensure that the TECH we commission and offer is accessible and inclusive to all, including by working with providers and partners to overcome any additional barriers that might be in place for members and ex-members of the armed forces. For instance, being able to adapt the look, sound and feel of the TECH we deploy to ensure it is personalised and considerate of conditions such as post-traumatic stress disorder.

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

Consider the needs of members and veterans of the armed forces and whether TECH can play a role in meeting those needs. Working with adult social care teams including occupational therapists regarding supporting technology access through disabled facilities grants and with the community and prevention teams for support groups tackling isolation and loneliness.

Work with providers and partners to overcome any additional barriers that might be in place for members and veterans of the armed forces

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?

No.

7. Adult and young carers

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

According to the 2011 Census, 18,400 (9.6%) Surrey residents reported that they provide unpaid care. The proportion has changed little since 2001 when 9.4% were providing care. Most carers are providing less than 20 hours per week, but 11,000 are providing 20 to 49 hours per week and 18,474 (1.63%) are providing more than 50 hours per week**.**

We recognise the many opportunities that technology can offer carers in terms of piece of mind, breaks and independence as well as connection. Our technology offer will capitalise on these opportunities. In terms of carers, solutions will be tailored both for the person being cared for and the carer themselves. The overall impact on carers is therefore likely to be positive.

Some of the barriers to technology for carers may be ensuring that the trust is there with pieces of technology, for instance where a carer can leave the house or the individual being cared for can leave

Equality Impact Assessment

the house because there is monitoring, GPS location or other technology in place. A focus will be on building an understanding and confidence in technology. Similarly, some carers may feel that they are letting their loved one down by using technology to improve their independence, connection and health and wellbeing. SCC will need to work with these carers to guide and support them.

A consideration with carers is the large number of informal carers that have not registered with SCC or another partner and who are therefore not being supported with their carer duties. It will be challenging to reach this cohort to support with technology solutions.

Furthermore, a current barrier to capitalising on technology for the carer cohort is the lack of opportunity, advice and guidance to use funding for technology as this is not currently an eligible form of funded support.

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

SCC TECH Team will work with carers to understand the opportunities and barriers for this cohort. Solutions will be focused not only on the person being cared for but the carer themselves. Through the strategy and new specification development, we will consult with a diverse range of carers about the technology services and products that matter to them.

We will be setting up a TECH Reference Group and will recruit an adult with LD&A in Surrey to be part of that group. We will be able to look at opportunities and challenges and test products with that group.

We will work with the Carers Practice team and Commissioners for Carer services to ensure there is appropriate guidance, support and training for the use of technology. This will include support for less digitally enabled carers as well as those in more rural parts of the county. Furthermore, we will work with these colleagues to look at opportunities for technology solutions to be eligible for carers' funding.

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?

- Digital inclusion
- Digitising social care with NHS partners
- Own systems design and transformation – LAS / AOSS / Tableau

We will work closely with other initiatives for carers, including use of carers' funding (offered by SCC and partners like GPs). The TECH team may also need to interface with other key carers' initiatives- personal breaks and carer passports for work etc.

Any negative impacts that cannot be mitigated?

No.

8. Those experiencing domestic abuse

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

There is a need to consider how TECH might support those who are experiencing or have experienced domestic abuse, in particular in terms of mental health and to support with connection. Those experiencing domestic abuse may need support to live independently and to overcome trauma. TECH can offer crisis management as well as the development of coping techniques and strategies to support mental health and wellbeing. Smart Home technology can offer enhanced independence, safety and connection for those that need extra help. Technology can also support with connecting people to

networks and communities of people who have similar lived experience and it can provide help with independent living, traveling and gaining employment.

By deploying technology to support those who have experienced or are experiencing domestic abuse, we may be able to offer more agency and control for the individual and offer more flexible support to individuals (for instance virtual calls and support might mean better access at any locations and time).

We also need to ensure that the TECH we commission and offer is accessible and inclusive to all, including by working with providers and partners to overcome any additional barriers that might be in place for those that are experiencing or have experienced domestic abuse. For instance, being able to adapt the look, sound and feel of the TECH we deploy to ensure it's personalised and considerate of conditions such as post-traumatic stress disorder.

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

Consider the needs of those experiencing domestic abuse and whether TECH can play a role in meeting those needs, including by working with the Community Safety and Changing Futures teams.

Work with providers and partners to overcome any additional barriers that might be in place for those that are experiencing or have experienced domestic abuse.

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?

- Digital inclusion
- Digitising social care with NHS partners
- Changing Futures
- Community Safety Partnership work

Any negative impacts that cannot be mitigated?

No.

9. Those experiencing digital exclusion

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

Equality Impact Assessment

12

Digital exclusion is a significant concern for the implementation of technological solutions and poses a risk for the success of TECH initiatives. In particular, digital exclusion may affect certain key cohorts such as those who are elderly and/or frail.

Some products may depend on use of existing technology, for example a smartphone or a reliable internet connection. In some instances, carers or family members may be relied upon to support with the operation and upkeep of technology for an individual.

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

As far as possible, technology will be made easy to use and interact with and, for some of the core offer (for instance motion sensors), there will be no need for the individual to have a knowledge and understanding of the technology. Routers and modems are being supplied currently to boost internet connection when needed and the TECH team will ensure it works with relevant SCC teams and partners on the digital inclusion agenda.

Where existing technology is needed for the use of a funded TECH offer (for instance smart phones for apps or for smart homes), the TECH team will, as far as possible, work with teams and partners on the provision of necessary equipment. Individuals will also be supported through training and guidance to support use of and adherence to technology.

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?

Links will be made with the digital inclusion and internet connectivity agenda across SCC teams and partners.

Any negative impacts that cannot be mitigated?

No.

10. Those living in rural/urban areas

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

Internet connectivity and access is reduced in more rural areas of the county which can present a significant barrier to technology use and access in this cohort. Generally, the population is older in more

Equality Impact Assessment

rural areas and work will therefore need to take place to make sure that rural living and age are not a factor in access to certain pieces of technology.

Furthermore, a nationwide digital switchover means internet access will be integral to the use of technology solutions from 2027 (with preparations underway currently). There is therefore a more significant risk that those in rural areas will be technologically disadvantaged.

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

The TECH team works with our motion sensor provider currently on the provision of routers and modems to boost internet connectivity. This work will need to continue as a priority. The new specification will need to make provision for those in rural areas and ensure that the provider works with SCC to reduce connectivity limitations for those living in rural areas.

SCC is also liaising with D&B colleagues on the digital switchover to ensure the toolkit is being used and information sharing arrangements are being progressed with networks etc. This will need to be maintained as a focus as the digital switchover progresses.

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?

See work on the digital switchover above. The TECH team will also be linking with colleagues across SCC and partners on the digital inclusion agenda.

Any negative impacts that cannot be mitigated?

No.

11.   Those experiencing socioeconomic disadvantage

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

For those with statutory needs, means-testing (as currently takes place across packages of care) will enable SCC to ensure that those below financial thresholds are provided with the technology they need

Equality Impact Assessment

to stay safe, independent and connected. For those who do not meet statutory responsibility thresholds or who are not eligible for free care and support, the TECH service and offer will need to consider how it can take a technology-enabled approach to ensure these individuals can still benefit from technology and receive information, advice and guidance on options for technology to support them.

Where technology (such as apps or Alexas) necessitates an individual owning existing technology (such as smart phones), SCC may wish to consider (alongside its partners) the provision of equipment to enable different socioeconomic groups to take full advantage of the TECH offer. The TECH team will also work alongside other teams on barriers such as internet connectivity and speed which may disproportionately affect those from lower socio-economic backgrounds.

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

Where individuals receive direct payment or other forms of payment to pay for their own care and support, the TECH team will be working with teams across AWHP to ensure individuals are offered robust and personal advice on technology that could support them. For instance, the LD&A teams and Carer Practice teams.

The TECH team may decide to provide advice to those who do not meet statutory needs or who are not eligible for free care and support. Where it recommends options, SCC would need to be mindful of the cost of different products and provide a balanced view of available technology and the cost implications for the individual.

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?

- Digital inclusion
- Nobody left behind agenda, including targeting key neighbourhoods in Surrey

Any negative impacts that cannot be mitigated?

No.

12. Adults with learning disabilities and/or autism

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

Our current TECH offer is enabling people with LD&A to live more independent and connected lives. Technology has the opportunity to remove some of the many barriers that prevent adults with LD&A from

Equality Impact Assessment

living a 'normal' life. Currently, apps have been trialled and implemented to support independent living, employment, mental health, independent travel and time management etc. There is therefore, overall, a strong positive impact of the TECH service and offer on adults with learning disabilities and/or autism.

When consulting Surrey's Autism Reference Group, we heard, among other things, about the opportunities of technology to support mental health, aid time management and help in the workplace. Some of the challenges and opportunities for technology that were raised by the group were:

- Object permanence whereby someone with autism may forget that an object exists because it is not in front of them. They may therefore forget that an app exists to help them navigate a certain situation.
- The need to personalise support and instructions sufficiently to ensure technology provides meaningful help.
- That crises often happen in the evening so having an app to support can be invaluable.
- People with LD&A often lack a personal support network or don't want to feel like they are bothering people so technology can provide invaluable support and connection.

As part of expanding and growing our TECH offer, SCC needs to be maximising opportunities to support those with LD&A. Furthermore, as we implement technology solutions across various cohorts (for instance elderly residents), we will need to consider any additional needs that may make interacting with the technology more complicated.

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

For our strategy and specification development, we will ensure we consult and engage with adults with disabilities in Surrey to understand the challenges and opportunities of TECH for this cohort. It is key that we hear directly from people with lived experience about what matters to them and how TECH can support their lives.

We will be setting up a TECH Reference Group and will recruit an adult with LD&A in Surrey to be part of that group. We will be able to look at opportunities and challenges and test products with that group.

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?

- Digital inclusion
- Digitising social care with NHS partners
- Corporate Transformation across Older People, Reablement, Mental Health and Learning Disabilities & Autism and Transition
- Own systems design and transformation – Liquidlogic Adult's Social Care System/Tableau

TECH can support SCC's ambition for an increase in adults with LD&A living in independent settings and gaining and sustaining employment.

Any negative impacts that cannot be mitigated?

No.

13. People with drug or alcohol use issues

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

Equality Impact Assessment

12 The use of and benefits of technology for those with drug and alcohol issues has not been fully explored. It is likely that this technology is currently being under-utilised for this cohort. Similarly, use of and adherence to technology for those with drug or alcohol use issues that are part of other cohorts (elderly and/or frail or those with disabilities or LD&A) needs to be fully considered. Technology could offer medication reminders, companionship, support and purpose in this cohort. It may also be that technology could reduce the intrusion of staff for individuals being cared for by SCC and partners who have drug or alcohol use issues.

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

Explore with Public Health and Health colleagues the potential for technology to support this cohort. In particular, link in substance misuse colleagues and with the Changing Futures team.

Explore with providers ways in which technology can be adapted to meet the needs of this cohort, for instance if mobility, manual dexterity, mobility etc are reduced.

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?

Changing Futures is focused on those with multiple disadvantage, including those with substance misuse issues. Technology is being explored as part of this initiative.

Any negative impacts that cannot be mitigated?

No.

14. People on Probation

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

The use of and benefits of technology for those on probation has not been fully explored. TECH might be able to support those who are on probation, in particular in terms of mental health, connection and living

Equality Impact Assessment

independently. TECH can offer crisis management as well as the development of coping techniques and strategies to support mental health and wellbeing. Smart Home technology can offer enhanced independence, safety and connection for those that need extra help. Technology can also support with connecting people to networks and communities of people who have similar lived experience and it can provide help with independent living, traveling and gaining employment.

By deploying technology to support those who are on probation we may be able to offer support with leading a more fulfilling life and therefore divert people away from criminality.

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

Explore with Community Safety and Public Health colleagues the potential for technology to support this cohort. In particular, link in with the Changing Futures team and the adult social care Prisons Team.

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?

- Community Safety
- Changing Futures is focused on those with multiple disadvantage, including those who have been in prison. Technology is being explored as part of this initiative.

Any negative impacts that cannot be mitigated?

No.

15. Adults with long term health conditions, disabilities (including severe mental illness SMI) and/or sensory impairment(s)

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

Please see section 2 for the impact that the TECH service might have on those with a disability.

Equality Impact Assessment

12 TECH has the potential to positively affect those with a long-term health condition by enabling greater independence, control and connection. TECH has the potential to support the monitoring and management of long-term health conditions which can support this cohort to live healthier, more fulfilling lives with increased agency and dignity. To fully leverage this potential, it will be necessary to work closely with Health and Public Health colleagues. It will also be necessary to refine the process for monitoring, including response to alerts and reviewing data collection. Furthermore, it will be necessary to ensure that TECH solutions for other cohorts (for instance those with LD&A and those who are elderly and frail) are suitable for those with long-term health conditions when they need to access them. This might involve different training and guidance or tweaking the product itself.

For those with an SMI, technology has a profound ability to support mental health and wellbeing and bring increased independence, control, connection and dignity to this cohort. In 2020/21, SMI prevalence was 0.73% of the Surrey population- 9,343 people. Apps can offer support out of hours and reduce the sense of being a 'burden' that individuals can feel when they need help and support. One individual at the Autism Reference Group who accessed mental health support via an app told us that crises often come in the evening and that they were lacking a personal support network and did not want to feel like they were bothering people. Technology can also offer prompts and reminders as well as support with daily activities for independent living, employment etc.

As above for those with long-term conditions, it will be necessary to ensure that TECH solutions for other cohorts (for instance those with LD&A and those who are elderly and frail) are suitable for those with SMI. This might involve different training and guidance or tweaking the product itself. Recently, the TECH team worked with a provider to use a different product (which was more discrete) for monitoring for an individual with an SMI as they were uncomfortable with the standard motion sensors.

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

For our strategy and specification development, we will ensure we consult and engage with adults with long-term health conditions and an SMI in Surrey to understand the challenges and opportunities of TECH for this cohort. It is key that we hear directly from people with lived experience about what matters to them and how TECH can support their lives.

The TECH team will work with colleagues on developing clearer guidelines about the level of mental health support offered by apps when they offer an advice or crisis line.

The TECH team will continue to explore with providers way in which technology can be adapted to meet the needs of this cohort.

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?

- Corporate Transformation across OP, Reablement, MH and LD&A
- Own systems design and transformation – LAS / AOSS / Tableau
- Coordinate with Health re. work on MDTs and on virtual wards.
- Explore the Kooth licencing in Surrey which currently is targeted at CYP rather than adults.

Any negative impacts that cannot be mitigated?

No.

16. Gypsy, Roma and Traveller communities

Equality Impact Assessment

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

Gypsy, Roma and Traveller communities are more likely to be living in more remote, rural and 'off-the-grid' areas in which connectivity and digital exclusion may be a significant challenge. Some members of the GRT community may not reside in permanent housing and the installation and accessibility of technology is therefore likely to be more challenging. This might compromise our ability to provide technology that would support members of the GRT community.

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

Working with our partners and providers, there is a significant focus on digital inclusion in Surrey. Our TECH providers can provide sim cards/routers/modems/gateways etc. that can boost connectivity in properties, allowing technology to be installed in areas that may experience poorer internet connection. In complex cases involving the GRT community, it is likely that the TECH team would need to work with providers as well as Economy & Growth and IT&D to ensure that connectivity is not a barrier to accessing Surrey's TECH offer. Explore with Public Health links to work they undertake with GRT community.

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?

- Digital inclusion
- Digitising social care with NHS partners

Any negative impacts that cannot be mitigated?

No.

3. Staff

Age including younger and older people

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

We do not anticipate the Technology Enabled Care & Homes Service will have an impact upon staff with protected characteristics. There are likely to be barriers to staff being familiar with the technology and become confident in using new products and processes that are introduced. However, this is not likely to be linked to certain groups or cohorts.

Equality Impact Assessment

12

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 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?

Explanation:

The TECH service will have an overall strongly positive impact on many of the groups identified in this EIA, in particular older people, adults with a disability, LD&A, SMI or long-term health conditions. TECH has the potential to give these cohorts independence and agency over their own care and support. It can have a positive impact on such areas as independent living, employment, mental health and wellbeing, travel, relationships and safety. The rollout of TECH is therefore an imperative for SCC and its partners. As a system, it is important we capitalise on opportunities to support these groups who need care and support and reduce the barriers they face in daily life.

It is recommended that we adjust the policy and service to ensure nobody is disadvantaged by technology, in particular those who experience digital exclusion and those living in rural areas. Additional support, guidance and technology is likely to be needed to ensure that these cohorts

Equality Impact Assessment

can access the technology offer. Furthermore, our technology solutions and service will need to be continually reviewed and refined to make sure many different cohorts can engage with the offer and use technology successfully. This may mean tweaking and shaping new products with the provider, rolling out additional training or providing bespoke solutions and information, advice and guidance. The TECH team is confident that the proposed adjustments listed in this document will remove the barriers faced by groups who need care and support.

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.

Equality Impact Assessment

Item	Initiation Date	Action/Item	Person Actioning	Target Completion Date	Update/Notes	Open/ Closed
1	August 2024	TECH Strategy Development	Senior Commissioning Manager for TECH	Q1 2025	Rigorous co-production and engagement with various stakeholders (many of which are listed in this document) to take place as part of the strategy development process. This will be a chance to consult with many groups on the opportunities and challenges offered by technology and make sure we do not disadvantage any cohorts.	Open
2	September 2024	New TECH Specification	Head of Commissioning for Older People and Senior Commissioning Manager for TECH	September 2025	Develop a new TECH service and offer that capitalises on all of the opportunities technology offers. This includes developing an equitable technology offer and one that supports Surrey residents most in need of care and support. The new service will tackle equality impact concerns, including addressing digital inclusion and internet connectivity.	Open

3	September 2024	Establishing a TECH Reference Group	Senior Commissioning Manager for TECH	January 2025	We will be able to look at opportunities and challenges and test products with this group. The group will have broad representation from many of the groups with protected characteristics listed in this EIA. Through this group, the TECH team will check and challenge progress.	Open
4	August 2024	Digital Switchover Support	TECH Team	Ongoing	Liaise with D&B colleagues on the digital switchover to ensure the toolkit is being used and information sharing arrangements are being progressed with networks etc. This will need to be maintained as a focus as the digital switchover progresses.	Open
5	September 2024	Coordination with Health on their funding to implement Sensor Based Falls Prevention and Detection Technology in CQC registered care homes.	Senior Manager & Senior Commissioning Manager for TECH	December 2024	Support with the selection of suitable care homes to make the most of the technology on offer.	Open
6	2023	Drop-in sessions for staff	Senior Manager for TECH, Senior Practice Lead and TECH Advisor(s)	Ongoing	Run by the TECH team to support managers and staff with concerns and challenges and to showcase equipment.	Open

Equality Impact Assessment

7	July 2024	Changes to LAS	Senior Manager for TECH	January 2025 (LAS Freeze dependent)	Make it easier for staff to refer for technology and identify where technology can support Care act needs.	Open

6a. Version control

Version Number	Purpose/Change	Author	Date
1	Initial Draft	Helen Tindall	25/09/2024
2.	Updated to incorporate changes on behalf of Directorate Equalities Group (DEG)	Helen Tindall	18/12/2024

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.

12

12 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	
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)	Kathryn Pyper, Chair of AWHP DEG 17 December 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

Equality Impact Assessment

Name	Job Title	Organisation	Team Role
Barbara Anu	EDI Manager	SCC	EDI Lead
Kathryn Pyper	Chief of Staff and EID Lead	SCC	EDI Lead
Ryan Mckeaveney	Performance Data Analyst	SCC	Data & Insight
Dan Stoneman	Head of Commissioning for Older People	SCC	Head of TECH and providing understanding of OP context
Mikaela Wall	Senior Manager for TECH	SCC	Operational insight and OT and LD&A background and experience

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: contact.centre@surreycc.gov.uk

This page is intentionally left blank

SURREY COUNTY COUNCIL

CABINET

DATE:	**28 JANUARY 2025**
REPORT OF CABINET MEMBER:	**NATALIE BRAMHALL, CABINET MEMBER FOR PROPERTY, WASTE AND INFRASTRUCTURE**
LEAD OFFICER:	**SIMON CROWTHER, EXECUTIVE DIRECTOR FOR ENVIRONMENT PROPERTY AND GROWTH**
SUBJECT:	**DISPOSAL OF QUADRANT COURT, 35 GUILDFORD ROAD, WOKING, GU22 7QQ**
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 for the freehold disposal of Quadrant Court, Woking following an extensive marketing campaign.

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").

The transaction will seek to exchange contracts immediately (subject to expiry of call in) with an aim to formally complete by the end of February 2025. Surrey County Council (The Council) will enter into a short-term leaseback arrangement with the purchaser from completion as outlined in the part 2 report and will provide full vacant possession on the relocation of the Council's operations to Victoria Gate, Woking.

Recommendations:

It is recommended that Cabinet:

1. Formally declares the asset surplus to operational requirements.

2. Approves the sale of Quadrant Court, Guildford Road, Woking to the party and upon the terms outlined in the part 2 Report.

3. Delegates authority to the Executive Director for 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:

- Quadrant Court is deemed surplus to operational requirements and to enable the disposal, Cabinet is to formally declare the asset surplus under the Councils Constitution.

13

Executive Summary:

1. The property comprises of a substantial office building recorded as offering 7,315 sq. m. of net useable office accommodation within an 8,497 sq. m building (the gross area that includes stairs, toilets, and boiler rooms), which the Council had originally leased then acquired the freehold in 2013.

2. The asset is currently occupied by Council services; however the intention is to relocate to alternative offices as part of the Council's AGILE programme.

3. The asset sits on a site extending to 2.8 acres.

4. An initial round of bids was concluded in September 2024 with subsequent best and final offers and clarifications concluded by early November 2024 (see part 2 report).

5. A summary Report and Recommendation together with a schedule of bids is attached as Appendices to the part 2 report, together with details on the overage and clawback proposals, and background on the preferred bidder. This report confirms that the proposal supports best value in accordance with Section 123 of the Local Government Act 1972.

6. Quadrant Court is currently in office use and has a Site Allocation within Woking Borough Council's (WBC) 2021 Site Allocation policy documents for continuation and enhancement of office uses. The continued use of the site for either office use, or any alternative uses within Planning Use Class E (retail, office, light industrial or life sciences) would otherwise be supported given the existing policy allocation.

   If alternative uses were to be sought through a planning application in this location, it remains necessary for any applicant to demonstrate that the current office / employment land allocation is surplus to market requirements through an updated market report / marketing exercise that can evidence the site is no longer needed nor suitable.

   The Council has included the availability of the office building on a leasing basis during marketing since March 2024. This evidence will be made available to the successful bidder.

7. Title to the property includes a Deed of Covenant and Undertaking dated 30 June 1983 between WBC and Norwich Union Insurance Group (Pensions Management) Limited related to the original development of the Property (whose terms were satisfied).

   - The Deed, however, still contains an ongoing obligation on the owner of the Property to enter into an agreement for the dedication of part of the site for highway purposes if and when required to do so. At the time of the 1983 Deed, WBC was appointed agent for the purpose of discharging highway functions, but this arrangement has since ceased, and the highway authority now vested with the Council.

- Discussions have been held within Council Highways on this matter with an agreement that only a small slither of land along the Guildford Road (eastern) boundary is required to support future local highway improvements, and marketing details have highlighted this matter.

8. Options considered as part of the pre-marketing included:

   i) A disposal unconditional on planning: In some instances, this might give a lower land value when a purchaser takes 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 (often over 12-24 months), whilst the Council still holds the land and void property risk in the interim.

   iii) The Council submitting and securing an outline scheme for a particular use to de risk a future sale. This premarketing activity would have required substantial investment in town planning matters, together with design, ground, and site survey activities over an extended period. Any secured consent may not have been used by a bidder or simply negated by permitted development rights. Premarket feasibility work is outlined in the part 2 report.

   iv) Retained service use: All service operations are to be relocated to Victoria Gate, Woking by late Spring 2025 as part of the approved Agile programme. hence this report seeks a formal surplus declaration.

9. The Council does not undertake speculative development on surplus properties due to not wishing to hold the development risk.

10. The site remains 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.

11. Legal services have been appointed to provide conveyancing services and to ensure all disposals accord with its legal and statutory obligations.

Risk Management and Implications:

	Risk Description	Mitigation
1	Planning permissions	The purchaser will be fully responsible for funding and securing all consents for any redevelopment proposal or change of use. If consent is secured for additional gross floorspace an overage provision applies.
2	Bidders withdraw	Ability to remarket site or revert to a number of bidders.
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 WBC.
5	The Council delay relocations and thus delay ability to complete a sale		The decant of staff to Victoria Gate and removal of all council furniture and fixtures is within the AGILE programme remit.
6	Site/ground conditions		See part 2

Financial and Value for Money Implications:

12. The transaction arises from an extensive open marketing campaign, and subsequent rounds of negotiation which secured substantive final bids as outlined in the part 2 report.

13. The sale delivers current Medium Term Financial Strategy targets for both revenue and capital. It also ensures the cessation of ongoing costs of running a vacant building.

14. Legal Services have been instructed to conclude conveyancing matters and to ensure the Council comply with their 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 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.

17. The proposed approach secures a capital receipt and enables the reduction in property running costs. As such, the recommendations will deliver the outlined Medium Term Financial Strategy (MTFS) agile efficiency and MTFS capital receipt target.

Legal Implications – Monitoring Officer:

18. This paper seeks Cabinet approval for the disposal of Quadrant Court, Woking.

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 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. As this may be a complex transaction structure including overage/clawback provisions, legal advice should be sought to ensure that the Council's position is preserved.

22. It is noted at paragraph 9, there is reference to a Deed of Covenant and Undertaking which contains ongoing obligations in respect of adoption of highway land. Specific legal advice should be sought to ensure that there are no ongoing liabilities for the Council and that any other relevant conditions/requirements have been discharged.

23. 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.

24. 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.

25. Legal advice should be sought at all relevant stages to ensure the Council meets its obligations.

Equalities and Diversity:

26. 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, whilst providing a significant capital receipt to support Council services.

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	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 WBC planning and Net Zero Carbon policy frameworks otherwise supported by the Council.
Public Health	None arising from this report.

Other Implications:

28. The sale remains conditional upon the Council providing full vacant possession of the site, with proposals to remove all furniture fixtures and fittings, and solar car ports as part of the approved AGILE programme.

What Happens Next:

29. Legal teams are instructed to immediately exchange contracts with completion targeting the end of February 2025 with full handover of the building once the Council can offer full vacant possession, currently indicated at late Spring 2025.

30. The Purchaser will be fully responsible for securing their own planning consents and both delivering and managing the site, together with managing all local stakeholder enquiries.

Report Author: Graham Glenn, Head of Acquisitions and Disposals, 07890 561245

Consulted:
* Natalie Bramhall, Cabinet Member for Property, Waste and Infrastructure
* Simon Crowther, Executive Director for Environment, Property and Growth
* Diane Wilding, Director, Land and Property
* Colin Galletly, Assistant Director, Estates
* Property Panel and Capital Programme Panel
* Property Legal teams SCC (Kara Burnett, Property Legal team)
* Finance team SCC (Louise Lawson and Rachel Wigley)

Annexes:

Part 2 report

SURREY COUNTY COUNCIL

CABINET

DATE:	**28 JANUARY 2025**
REPORT OF CABINET MEMBER:	**DAVID LEWIS, CABINET MEMBER FOR FINANCE AND RESOURCES**
LEAD OFFICER:	**ANDY BROWN, DEPUTY CHIEF EXECUTIVE & EXECUTIVE DIRECTOR OF RESOURCES (S151 OFFICER)**
SUBJECT:	**2024/25 MONTH 8 (NOVEMBER) 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 November 2024 (M8) 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 M8, 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 continuing to work 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. If the contingency budget is not required in full, then any balance will be transferred to reserves to further improve financial resilience and provide funding for future investment.

Key Messages – Capital

- At M8, capital expenditure of £325m is forecast for 2024/25. This is £3.6m more than the re-phased budget. Further details are provided in paragraphs 11-13.

Recommendations:

It is recommended that Cabinet:

1. Notes the Council's forecast revenue budget and capital budget positions for the year.

Executive Summary:

14

1. At M8, the Council is forecasting a full year overspend of £18.6m against the revenue budget. This is an increase of £0.9m on the M7 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 November 2024

	M8 Forecast £m	Annual Budget £m	Forecast Variance £m
Adults, Wellbeing & Health Partnerships	519.3	515.7	3.6
Children, Families and Lifelong Learning	308.6	299.9	8.8
Place	193.7	185.6	8.1
Community Protection & Emergencies	44.1	44.1	0.0
Resources	80.9	80.8	0.0
Central Income & Expenditure	79.4	82.2	(2.8)
Directorate position	1,226.1	1,208.3	17.8
Council Tax	(921.1)	(921.1)	0.0
Business Rates	(151.3)	(152.1)	0.8
Government Grants	(135.2)	(135.2)	0.0
Overall	18.6	(0.0)	18.6

2. The forecast overspend relates primarily to the following:

Adults Wellbeing & Health Partnerships - £3.6m overspend, unchanged from M7.
This is due to a £3.9m overspend on the total care package budget, primarily related to starting the year with higher care package commitments, combined with spending pressures during the year, particularly for Older People care packages, and a £2.0m overspend on the Adult Social Care staffing & other expenditure budget due to 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 £1.6m underspend for wider support services, £0.5m of additional funding for ASC services and £0.2m of reduced expenditure across Public Health and communities services.

Children, Families & Lifelong Learning - £8.8m overspend, unchanged from M7
There has been no change in forecast for CFLL between Month 7 and 8, with the forecast remaining at an overspend of £8.8m

The largest area of pressure in the service remains in Home to School transport, although we have seen some in year reduction in the cost and the forecast risk in the service with the overspend steadying at £7m. There continues to be significant work invested in identifying areas of saving to mitigate the continuing increase in demand for provision within the number of Children with EHCPs travelling to schools a distance from their homes. This has included large reductions in the number of post 16 pupils with individual transport arrangements now travelling independently.

The Directorate continues to scrutinise all vacant posts to ensure staffing efficiencies are maximised.

Place - £8.1m overspend, £0.9m increase from M7
Highways and Transport is forecasting a £2.6m overspend in relation to additional verge maintenance works. Additional pressures relating to parking and traffic enforcement (contract inflation linked to the living wage, lower than expected levels of enforcement) and concessionary

fares (national changes to reimbursement rates and increased volume of journeys) are mitigated by planned drawdown of one-off prior year parking surpluses and other offsetting efficiencies.

Land & Property are forecasting an overspend of £4.3m due to the non-achievement of facilities management (FM) efficiencies (£1.5m), higher than expected demand for FM services (£1m), one-off back dated electricity charges (£0.7m), one-off dual operation of office buildings (£0.5m), and loss of rental income (£0.5m). The Service is working to identify ways to mitigate this overspend, specifically those in relation to FM costs. Additional controls have been out in place to manage the contract and additional approvals for all service desk decisions will be required with immediate effect including a temporary pause on any non-urgent requests. In addition, a line-by-line review of all other spend and income has been carried out to identify opportunities to offset the forecast overspend.

Environment forecasts an overspend of £1m in Waste, due primarily to market costs of managing dry mixed recyclables, after taking account of mitigations.

There are smaller pressures and mitigations in other services.

Resources – no variance, no change from M7.

The directorate is forecasting a balanced position.

Central Income & Expenditure & Corporate Funding – £2m net underspend, no change from M7. Central Income and Expenditure is forecasting a £2.8m underspend, offset by a £0.8m overspend on business rates funding.

There is a £0.8m overspend forecast in relation 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 £2.8m 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 £6.9m, consisting of quantified risks of £7.7m, offset by opportunities of £0.8m. This is a decrease in net risks of £4.2m from last month. 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 forecast 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 through the DfE Free Schools programme have been delayed in becoming available whilst costs and demand have grown at a faster rate than in the original assumptions and higher than the Dedicated Schools Grant.

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 third monitoring report for the Safety Valve agreement in 2024/25 was submitted to the Department for Education at the end of November 2024. The instalment related to this return of £1.91m was received at the end of December.

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 latest return highlighted that the Council is no longer on track to meet the original target of balancing the DSG by 2026/27 and we have requested an extension in the timeline, extending the programme until the end of 2030/31. We are currently awaiting a response from the DfE.

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, undertook a detailed review of the programme to validate and ensure deliverability. The re-phased capital programme for 2024/25 was approved by Cabinet in July 2024. The current capital budget is £321.4m,

12. Year to date expenditure at the end of November is £195m, and the full year forecast is £325m, which is £3.6m more than the re-phased budget, a £6.7m decrease from month 7.

Strategic Capital Groups	Annual Budget	FY Forecast at M8	M8 Forecast Variance	M7 Forecast Variance	Change from M7 to M8	Movement
	£m	£m	£m	£m	£m	
Property						
Property Schemes	131.2	138.7	7.5	7.2	0.3	Increase
ASC Schemes	1.6	1.6	0.0	0.0	0.0	Unchanged
CFLC Schemes	4.4	4.5	0.1	0.1	0.0	Unchanged
Property Total	**137.2**	**144.8**	**7.6**	**7.3**	**0.3**	Increase
Infrastructure						
Highways and Transport	125.2	135.1	9.9	9.7	0.2	Increase
Infrastructure and Major Projects	33.6	22.1	(11.5)	(4.2)	(7.3)	Decrease
Environment	9.0	7.8	(1.2)	(1.5)	0.3	Increase
Surrey Fire and Rescue	2.5	3.9	1.4	(0.1)	1.5	Increase
Infrastructure Total	**170.3**	**168.9**	**(1.4)**	**3.9**	**(5.3)**	Decrease
IT						
IT Service Schemes	13.9	11.3	(2.6)	(0.9)	(1.7)	Decrease
IT Total	**13.9**	**11.3**	**(2.6)**	**(0.9)**	**(1.7)**	Decrease
Total	**321.4**	**325.0**	**3.6**	**10.3**	**(6.7)**	**Decrease**

13. The overall variance is attributable to the following:

- **Land and Property - £7.6m variance over budget** caused by acceleration of planned works on several schemes including Independent Living (£2.6m), SEND (£2.0m), libraries transformation (£1.8m), Corporate Parenting care homes (£1.7m), winter maintenance depots

(£1.7m) and Staines and Sunbury Hubs (£1.4m). This is partly offset by slippage of £3.6m across several other schemes.

Infrastructure - £1.4m variance under budget, due to slippage of £7.6m (£7.6m increase) on the A308 modernisation and A320 North of Woking schemes. As well as a delay to part of the Farnham Town Centre programme (£1.0m), slippage across various SIP schemes (£2.7m) and a further £4.6m slippage across a number of other schemes.

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.

This is mostly offset by £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 increased spend on footway maintenance (£2.2m) and bridge maintenance (£1.6m).

There is also £1.5m acceleration on Fire Integrated Transport Function.

- **IT - £2.6m variance under budget,** caused by a further reprofile of the WAN / Wi-Fi refresh programme that has reprofiled spend into future years (£0.6m). And a delay in the need to renew hardware due to a 13-month extension of the existing license (£1.1m).

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 Resources (s151 Officer) andy.brown@surreycc.gov.uk

Consulted: Cabinet, Executive Directors, Heads of Service

Annexes:

Annex 1 – Detailed Revenue M8 position

Detailed Revenue M8 Position   Annex 1

Service	Cabinet Member	Net budget	Forecast	Outturn variance
Public Health	M Nuti	£36.8m	£36.7m	(£0.1m)
Mental Health Investment Fund	M Nuti	£4.9m	£4.9m	£0.0m
Communities & Prevention	M Nuti	£3.7m	£3.6m	(£0.1m)
Adult Social Care	S Mooney	£470.4m	£474.1m	£3.8m
Adults, Wellbeing & Health Partnerships		**£515.7m**	**£519.3m**	**£3.6m**
Family Resilience	C Curran	£68.4m	£68.2m	(£0.2m)
Education and Lifelong Learning	C Curran	£31.6m	£31.2m	(£0.4m)
Commissioning	C Curran	£2.4m	£2.7m	£0.3m
Quality & Performance	C Curran	£87.4m	£93.8m	£6.5m
Corporate Parenting	C Curran	£112.0m	£111.7m	(£0.3m)
Exec Director of CFLL central costs	C Curran	-£1.9m	£1.1m	£3.0m
Children, Families and Lifelong Learning		**£299.9m**	**£308.6m**	**£8.8m**
Highways & Transport	M Furniss	£71.1m	£73.7m	£2.6m
Environment	M Heath/ N Bramhall	£82.8m	£83.7m	£1.0m
Infrastructure, Planning & Major Projects	M Furniss	£2.6m	£2.7m	£0.1m
Planning Performance & Support	M Furniss	£3.3m	£3.5m	£0.3m
Land & Property	N Bramhall	£24.0m	£28.3m	£4.3m
Economic Growth	M Furniss	£1.8m	£1.7m	(£0.1m)
Place		**£185.6m**	**£193.7m**	**£8.1m**
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
Community Protection & Emergencies		**£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
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	£0.2m	£0.2m	£0.0m
Customer and Communities Leadership	D Turner-Stewart	£0.5m	£0.5m	£0.0m
Design & Change	D Lewis	£4.1m	£3.5m	(£0.5m)
Heritage	D Turner-Stewart	£0.9m	£1.0m	£0.0m
Information Technology & Digital	D Lewis	£21.2m	£21.0m	(£0.2m)
Libraries Services	D Turner-Stewart	£7.8m	£7.8m	£0.0m
People & Change	T Oliver	£9.4m	£9.7m	£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
Finance	D Lewis	£8.5m	£8.5m	(£0.0m)
Joint Orbis	D Lewis	£6.2m	£6.4m	£0.2m
Legal Services	D Lewis	£6.2m	£6.1m	(£0.1m)
Democratic Services	D Lewis	£3.9m	£4.0m	£0.1m
Director of Resources	D Lewis	£0.1m	£0.4m	£0.3m
Leadership Office	D Lewis	£2.3m	£2.0m	(£0.3m)
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	£0.7m	£0.9m	£0.3m
Twelve15	D Lewis	-£1.0m	-£1.1m	(£0.1m)
Resources		**£80.8m**	**£80.9m**	**£0.0m**
Central Income & Expenditure	**D Lewis**	**£82.2m**	**£79.4m**	**(£2.8m)**
Directorate position		**£1,208.3m**	**£1,226.0m**	**£17.7m**
Corporate Funding		**-£1,208.4m**	**-£1,207.5m**	**£0.8m**
Overall		**-£0.0m**	**£18.6m**	**£18.6m**

14

This page is intentionally left blank

Document is Restricted

16

This page is intentionally left blank

By virtue of paragraph(s) 5 of Part 1 of Schedule 12A
of the Local Government Act 1972.

Document is Restricted

This page is intentionally left blank

Document is Restricted

17

This page is intentionally left blank

Document is Restricted

17

This page is intentionally left blank

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

Document is Restricted

This page is intentionally left blank