

Public Document Pack

Mid Devon District Council

Cabinet

Tuesday, 1 November 2022 at 10.00 am
Phoenix Chamber, Phoenix House, Tiverton

Next ordinary meeting
Tuesday, 29 November 2022 at 10.00 am

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Membership

Cllr R M Deed
Cllr C J Eginton
Cllr R J Chesterton
Cllr Mrs C P Daw
Cllr D J Knowles
Cllr B A Moore
Cllr S J Penny
Cllr C R Slade

AGENDA

Members are reminded of the need to make declarations of interest prior to any discussion which may take place

1. **Apologies**
To receive any apologies for absence.
2. **Public Question Time**
To receive any questions relating to items on the Agenda from members of the public.
3. **Declarations of Interest under the Code of Conduct**
To record any interests on agenda matters.
4. **Minutes of the Previous Meeting** *(Pages 3 - 12)*
To consider whether to approve the minutes as a correct record of the meeting held on 4 October 2022.
5. **Update from the Cabinet Member for Continuous Improvement**
To receive a verbal update from the Cabinet Member on the progress in driving improvement in services across the Council.
6. **Medium Term Financial Plan** *(Pages 13 - 48)*
7. **Review of Development Management - Discretionary Fees**
(Pages 49 - 56)
8. **Crediton Masterplan - Procurement** *(Pages 57 - 70)*
9. **Notification of Key Decisions** *(Pages 71 - 82)*
To note the contents of the Forward Plan.

Stephen Walford
Chief Executive
Monday, 24 October 2022

Meeting Information

From 7 May 2021, the law requires all councils to hold formal meetings in person. The Council will enable all people to continue to participate in meetings via Zoom.

If you want to ask a question or speak, email your full name to Committee@middevon.gov.uk by no later than 4pm on the day before the meeting. This will ensure that your name is on the list to speak and will help us ensure that you are not missed. Notification in this way will ensure the meeting runs as smoothly as possible.

If you would like a copy of the Agenda in another format (for example in large print) please contact Andrew Seaman on: E-Mail: aseaman@middevon.gov.uk

Public Wi-Fi is available in all meeting rooms.

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MID DEVON DISTRICT COUNCIL

MINUTES of a **MEETING** of the **CABINET** held on 4 October 2022 at 10.00 am

Present

Councillors

R M Deed (Leader), C J Eginton, Mrs C P Daw, D J Knowles,
B A Moore, S J Penny and C R Slade, R Chesterton (virtually)

Also Present

Councillor(s)

B Warren, J Buczkowski, S Clist, E Lloyd

Also Present

Officer(s):

Richard Marsh (Director of Place), Maria De Leburne (Interim Monitoring Officer), Andrew Jarrett (Deputy Chief Executive (S151)) and Stephen Walford (Chief Executive)

62. **APOLOGIES**

There were no apologies for absence.

63. **PUBLIC QUESTION TIME**

The following questions were received from members of the public:

Nick Quinn

My questions are on Agenda Item 4 (Minutes of the Previous Meeting) – specifically the non-accuracy of Resolution in Draft Minute 61. This Draft Minute does properly record that: “*The Cabinet resolved not to support the recommendation of the Scrutiny Committee*”, but what follows is NOT accurate. The Council Constitution requires that: *Minutes contain all Motions in the exact form the Chairman put them*. It is clear from the recording of the meeting, that the words about the previous view and decision, were not spoken by the Leader in the motion he put. He just read out the Resolution of Scrutiny Committee, which contained their recommendation, and asked for a vote on that. To make certain Cabinet understood what they were voting on, the Member Services Officer asked the Members to: “*raise their hands in support the recommendation from the Scrutiny Committee*”, which nobody did - so she continued: “*All those against*” and all the hands went up. The Officer then confirmed the outcome, by saying: “*So you are against the recommendation from the Scrutiny Committee. Thank you Members*”. The words about the previous view and decision, were not put to the vote, which makes the current Draft Minutes both unconstitutional and inaccurate. For the Minutes to be agreed as a true record, these words must be removed.

Question 1 is to the Leader: Will you please confirm that, when you put your motion to the vote, you did NOT speak the words about the previous view and decision, currently shown in the Draft Minute 61 Resolution?

Question 2 is to the Cabinet: So you can, honestly, agree the Minutes as a True Record, will you please correct the Resolution in Draft Minute 61 to read - “*The Cabinet resolved not to support the recommendation of the Scrutiny Committee*” (*Proposed by the Leader*) – and nothing else? I previously informed the Monitoring Officer of this inaccuracy and she will be able to confirm what I have said.

The Leader thanked Mr Quinn for his questions and noted they would be answered later.

The Leader responded that it was up to the Committee concerned to make any adjustments to their minutes. The Leader asked the Cabinet if they wished to make any amendments to the previous minutes to which there were none.

At item 14 of the cabinet agenda the Monitoring Officer had taken the opportunity to answer the public questions and explained that reference had been made to council procedure rule 20.2, however, this rule only applied to Full Council and not to Cabinet and the minutes that were approved by Cabinet were legitimate.

64. MINUTES OF THE PREVIOUS MEETING

The minutes of the previous meeting were approved as a correct record and signed by the Leader.

65. DECLARATIONS OF INTEREST UNDER THE CODE OF CONDUCT

Members were reminded of the need to make declarations of interest if and when necessary.

Councillor C Eginton declared a non-pecuniary interest for item 11, in which he ran a shop on Tiverton High street but had no intention to apply for the scheme. He remained in the meeting during this item.

66. 3 RIVERS DEVELOPMENTS LIMITED – FUNDING REQUEST

The Leader of the Council raised that at the last Cabinet meeting (22 September 2022) Cabinet resolved not to accept the recommendation from the Scrutiny Committee in relation to the Call-In of the 6 September Cabinet decision on 'Three Rivers Developments Limited – Funding Request'.

For avoidance of doubt the Leader asked the Cabinet if they were content to confirm the decision made on the 6 September.

RESOLVED: That Cabinet confirms the decision of the 6 September "That it be agreed to increase the current loan agreements by a total of £2,280,784 to cover; the identified project overspends on 2 projects included in the previously agreed Business Plan funding envelope agreed on the 30 November 2021 and increased the working capital loan agreement. In addition, it be agreed that a transfer from a future projects budget of £0.58m in order for the business to work up new potential projects to replace the out of District projects that had to be removed from the company's business plan after changes to the Treasury's Public Works Loan Board loan arrangements."

(Proposed by the Leader)
(Councillor S Penny Abstained)

Note: The Cabinet Member for Finance announced that he had become an independent councillor with immediate effect.

67. FINANCIAL MONITORING

The Deputy Chief Executive provided a verbal update on the financial monitoring which highlighted the following:

- The financial forecast for the council had worsened since quarter 1, this had largely been due to the cost of living crisis and expectations and estimates around the provisional staff pay awards. In regards to the provisional staff pay award, one had been accepted by one of the unions and the Council were waiting to hear back from two other unions.
- Recruitment remained a challenge and key positions were covered by agency workers. It was noted that there had been improved income in areas such as waste and planning.
- Fuel prices had stabilised and the government's energy price cap had applied to local authorities. In addition, Mid Devon District Council had already pre-purchased fuel at a favourable rate. In addition the planned removal of the national insurance increase would benefit the authority as long as offset payments from the Government remained. The reduction of stamp duty could help any buybacks of right to buy properties and in a rising interest rate market it would need to be assessed how our lending and borrowings within the capital programmed would be affected.
- There were outstanding items that awaited a second and final payment for the energy rebate funding programme, some provisional guidance on the increased audit fees had been received, these detailed that audit fees could be increased by 150%.
- A formal Q2 update had been planned to be presented in November 2022 as well as an initial steer on the 2023/24 budget as well on any overspends for the current financial year.

The Leader thanked the Deputy Chief Executive for his update and noted that Cabinet had started to tackle the issue, called the £1m challenge for the cost pressures for the current year. All aspects of income and looking at the cost of the provision of services. Therefore, the adjustment/level of service provision might need to be considered. Cabinet would liaise with the Policy Development Groups so that recommendations that related to the budget could be brought to Cabinet.

RESOLVED: That the update be noted.

68. DATA PROTECTION POLICY

The Cabinet were presented a report from Corporate Manager for Business Transformation and Customer Engagement which sought approval for the new Data Protection Policy. This report reviewed the existing policy to ensure compliance with the Data Protection Act (DPA) 2018 and the General Data Protection Regulations.

The Cabinet Member for the Working Environment and Support Services noted that the policy was last reviewed in 2019 and that no changes were identified.

RESOLVED: That the Data Protection Policy be approved and the next review date set for 3 years hence.

(Proposed by Cllr C Eginton and seconded by Cllr A Moore)

Reason for Decision: Not complying with the DPA 2018 and GDPR would expose MDDC to enforcement action by the Information Commissioner's Office (ICO). Approving the Data Protection Policy reduces the risk of enforcement action by the ICO. This policy supports good governance arrangements enabling confidence in delivery of the Corporate Plan.

69. FREEDOM OF INFORMATION POLICY

The Cabinet were presented a report from Corporate Manager for Business Transformation and Customer Engagement which sought approval for the new Freedom of Information Policy. This report reviewed the existing policy to ensure compliance with the Data Protection Act (DPA) 2018 and the General Data Protection Regulations.

The Cabinet Member for the Working Environment and Support Services noted that the policy was last reviewed in 2019 and that no changes were identified.

RESOLVED: That the revised Freedom of Information and Environmental Information Regulations Policy be approved and the next review date set for 3 years hence.

(Proposed by Cllr C Eginton and seconded by Cllr C Daw)

Reason for Decision: Not complying with the Freedom of Information Act 2000 (FOIA) and Environmental Information Regulations 2004 (EIR) would expose MDDC to the potential for enforcement action by the Information Commissioner's Office (ICO). Approving the Freedom of Information and Environmental Information Regulations Policy reduces the risk of enforcement action by the ICO. This policy supports good governance arrangements enabling confidence in delivery of the Corporate Plan.

70. RECORDS MANAGEMENT POLICY

The Cabinet were presented a report from Corporate Manager for Business Transformation and Customer Engagement which sought approval for the revised Records Management Policy.

The Cabinet Member for the Working Environment and Support Services noted that there was a new and significant requirement at 2.1 of the report and that it was in accordance with current data protection legislation. It ensured that record handling happened as part of a managed process and would be logged. In July 2022 a new Information Management Team had been created.

RESOLVED: That the revised Records Management Policy be approved.

(Proposed by Cllr C Eginton and seconded by Cllr D Knowles)

Reason for Decision: Not complying with the DPA 2018 and GDPR would expose MDDC to enforcement action by the Information Commissioner's Office (ICO). Approving the Records Management Policy reduces the risk of enforcement action by the ICO. This policy supports good governance arrangements enabling confidence in delivery of the Corporate Plan.

71. TIVERTON A361/HIF SCHEME - UPDATE

The Cabinet were presented with a report from the Director of Place, which informed Members of the latest position regarding the Tiverton HIF/A361 junction scheme, seeking decisions regarding next steps.

The Cabinet Member for Planning and Economic Regeneration noted that Members would recall that the July Cabinet had agreed further work by officers to seek additional funding to support delivery of the project or to reduce costs and scope to facilitate delivery. The report set out that it has unfortunately not proved possible to secure further funding and that officers did not believe that the project could to be delivered within the current budget, even with a reduced scope. A recommendation was therefore set out to pause delivery and progression of the scheme.

The Cabinet Member emphasised that pausing the scheme had not meant that it would not or could not be delivered in the future and that the risks were considered as set out in the report.

The Leader thanked the Cabinet Member for their presentation and sought clarification that if the phase 2 junction was paused, would this have an impact on the number of houses developed within that area. The Director of Place explained that it would not have an impact on future housing developments.

A Cabinet Member raised their support and noted that other projects might have to be paused due to the current economic climate.

A Cabinet Member wanted to know whether there were other projects that could be funded by the Homes England HIF funding, to which the Director of Place explained that any other scheme would require potential housing developments to be unlocked, which would limit potential options,

A Cabinet Member noted that this was the right way to go.

RESOLVED: That

- Cabinet instructs officers to pause progression and delivery of the next phase (phase 2) of the A361 junction owing to cost increases which make the project unaffordable at this time.
- Cabinet instructs officers to continue to engage with Homes England with a view to identifying alternative options to utilise the HIF funding in order to support the delivery of other aspects of the Tiverton EUE scheme and, if alternative options are identified, to progress these to a stage where a viable proposition can be brought back for consideration by Cabinet.

(Proposed by Cllr C Slade and seconded by Cllr D Knowles)

Reason for Decision: Pausing delivery of the scheme at this time would delay delivery of the project, but the intention remains to deliver the project and deliver key objectives as established within the corporate plan. Borrowing to fund the 'gap' would add significant further financial pressures to the Council at a time of increasing economic and financial uncertainty and pressures and this approach is therefore not one which is considered prudent, and is not recommended.

72. **SHOPFRONT ENHANCEMENT SCHEME**

The Cabinet were presented with a report from the Director of Place, which informed Members about the new Tiverton Shopfront Enhancement Scheme launching in October / November 2022 and requested approval for the revised Scheme.

The Cabinet Member for Planning and Economic Regeneration noted that this was a relaunch of the shopfront enhancement scheme that was successfully delivered from 2015 until 2020, when the allocated funding was depleted. The purpose of this scheme was for shopfronts to be maintained as well as visual appearance of the shopping areas to be improved in order for footfall to be promoted. Each grant offered would provide up to 50% of the total costs for improvements up to a maximum of £2,500. The grant could be used for repairs, redecoration and signage in keeping with the conservation area.

The Leader thanked the Cabinet Member for their presentation and opened the floor to questions which were as followed:

- A Cabinet Member asked if Cullompton would have a shopfront enhancement scheme, to which the Cabinet Member for Planning and Economic Regeneration noted that there was an existing scheme within Cullompton's heritage action zone already.
- A Cabinet Member noted that this scheme was vitally important and that Tiverton's shopfronts had improved compared to a number of years ago.
- A Cabinet Member wanted to know to what extent had discussions taken place with Tiverton Town Council and to what extent was their influence on this scheme and could they take it further to enhance the scheme's benefits. The Director of Place explained that Tiverton Town Council were aware of the scheme and had been involved in the scheme's formation, with recommended improvements to the scheme been received from the Town Council. The Director of Place also confirmed that work was underway so that this scheme could be aligned with other schemes.

The Leader asked who the nominated Tiverton Ward Members might be, but it was explained by the Director of Place that recent conversations had been undertaken but not yet confirmed.

RESOLVED: That the new Tiverton Shopfront Enhancement Scheme be approved and three Tiverton Ward Members be nominated to be part of the Funding Panel for the Scheme.

(Proposed by Cllr C Slade and seconded by Cllr D Knowles)
(Cllr C Eginton abstained)

Reason for Decision: This supports the Corporate Plan priority of 'Economy', in particular: "Identify strategic and tactical interventions to create economic and community confidence and pride in the places we live. This includes a continued focus on Town Centre Regeneration"

73. CREDITON NEIGHBOURHOOD PLAN

The Cabinet were presented with a report from the Director of Place, which asked Cabinet to recommend to Council the adoption of the Crediton Neighbourhood Plan in order to meet the requirements of the relevant Acts and Regulations.

The Cabinet Member for Planning and Economic Regeneration noted the following:

- The Crediton Neighbourhood Plan was subject to a local referendum held on 22nd September 2022, within the Crediton Parish. Since 88.4 % of voters were in favour of the Crediton Neighbourhood Plan the plan had become part of the statutory development plan for the area.
- Applications for planning permission must be determined in accordance with the development plan, unless material considerations indicated otherwise. Policies of the Neighbourhood Plan would be used alongside policies in the adopted Mid Devon Local Plan, the Devon Minerals and Waste Plans, to help guide planning applications submitted to the Council for determination in the Crediton area.
- The Council must now formally adopt the Plan, however, the Council may refuse to make the Plan if it considered that making it would be a breach, or would otherwise be incompatible with, any EU obligations or any human rights obligations.
- Council officers hold the view that the making of the Plan would not breach these obligations. The Council must decide whether to make, or refuse to make, the Plan.

RESOLVED to RECOMMEND: To Council that

- The Crediton Neighbourhood Plan (Appendix 1) is 'made' (adopted) and brought into force as part of the statutory development plan for the Crediton area.
- The Crediton Neighbourhood Plan Adoption Decision Statement (Appendix 2) is published to meet the publicity requirements in the Regulations.

(Proposed by the Leader)

74. **NON STATUTORY INTERIM PLANNING POLICY STATEMENT: CLIMATE EMERGENCY**

The Cabinet were presented with a report from the Director of Place, which sought approval for the Non-Statutory Interim Planning Policy Statement to be published for public consultation.

The Cabinet Member for Planning and Economic Regeneration noted that:

- At the Cabinet meeting held on 4 February 2021 the Cabinet considered there was a need for guidance to clarify how the requirements of the Local Plan adopted in July 2020 could be met in relation to climate change as well as other planning policies, legislation and more recent technical evidence. The 'Statement' was an interim measure in advance of a new Local Plan ('Plan Mid Devon') due to be completed, and would be used to help inform the preparation of this new Local Plan.
- The 'Statement' included a Climate Emergency – Planning Applications Checklist, which had been developed by planning officers and the Council's Climate and Sustainability Specialist. The checklist was based on 6 principles and 19 objectives relevant to mitigating, and adapting to, climate change. Applicants were expected to have regard to the principles and objectives in their planning applications.
- The 'Statement' also introduces a 'Net Zero Carbon Toolkit' which had been funded through the Local Government Association Housing Advisers Programme.
- The third key part of the 'Statement' is a 'Net Zero Housing Assessment Tool'. This had been developed by officers in association with the University of Exeter. The Net Zero Housing Assessment Tool could be used alongside the Net Zero Carbon Toolkit to evaluate the costs and benefits of a range of low carbon standards for new residential developments.
- The 'Statement' would not have the status of a Supplementary Planning Document. However, it will be guidance and a resource that can help clarify how the requirements of existing development plan policies can be met in relation to climate change, which can assist the assessment of planning applications, and it underlines that tackling climate change is a material consideration.

The Leader thanked the Cabinet for their presentation and asked the Chief Executive to make a comment on the work done with the University of Exeter, to which the Chief Executive explained that work undertaken by the University of Exeter was more in relation to the Council's own emissions and that this report considered how plans would be considered within the planning process.

A Cabinet Member welcomed this report and noted that this report played an important part in Mid Devon's decarbonisation.

A Cabinet Member was positive about this report, but raised that this was not statutory and therefore there were no obligations for developers to follow this. Clarification was sought as to what the costs might be to uphold this. The Director of Place explained that the process was quite involved and expected that there might be a degree of pushback but climate change was relevant and this process would support deliberations at Planning Committee and for engagement to be promoted.

The Cabinet Member added that there was a cost to this and raised concern over public engagement and that there was a need for its use to be encouraged. An Officer explained

that the consultation would highlight concerns raised and that adjustments could be made where necessary.

A Member had noted that this demanded extra work, it was a stepping stone and set the Council's intentions as well as environmental expectations. In addition, they noted that other Councils already had environmental policy standards, whereas this Council had not.

A Member had raised concern that this process was not statutory and that some developers had not been as engaged with environmental frameworks because it was not policy and was concerned it would be ignored.

The Chief Executive explained that had not been a choice for the process to be statutory or non-statutory and that the current local plan had not contained the necessary content to make this process supplementary to the local plan which was why this process had been introduced.

RESOLVED: That

- The draft Non-Statutory Interim Planning Policy Statement: Climate Emergency (Appendix 1), including the Net Zero Carbon Toolkit (Appendix 2) and the Net Zero Housing Assessment Tool (Appendix 3) be approved for public consultation.
- Delegated authority be given to the Director of Place in consultation with the Cabinet Member for Planning and Economic Regeneration to finalise the material and arrangements for consultation.

(Proposed by Cllr C Slade and seconded by Cllr A Moore)

Reason for Decision: The Non-Statutory Interim Planning Policy Statement plan will help meet the Corporate Plan priorities: 'Homes', 'Environment', 'Community' and 'Economy'. The Non-Statutory Interim Planning Policy Statement will supplement relevant policies in the adopted Local Plan where these are relevant to adapting to, and mitigating the impacts of, climate change through development in Mid Devon, and it will draw from current good practice and relevant legislation and statutory provisions since the Local Plan was submitted to the Secretary of State in March 2017 and subject to its independent examination.

75. NOTIFICATION OF KEY DECISIONS

RESOLVED: That the notification of Key Decisions be noted.

(The meeting ended at 11.12 am)

CHAIRMAN

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CABINET
01 NOVEMBER 2022

AGENDA ITEM

MEDIUM TERM FINANCIAL PLAN – General Fund (GF), Housing Revenue Account (HRA) and Capital Programme

Cabinet Member Cllr Andrew Moore, Cabinet Member for Finance
Responsible Officer Andrew Jarrett – Deputy Chief Executive (S151)

Reason for Report: To present to Member's the updated Medium Term Financial Plan (MTFP) which covers the period 2023/24 to 2027/28 and takes account of the Council's key strategies (i.e. the Corporate Plan, Business Plans, Treasury Management Plan, Asset Management Plan, Work Force Plan and Capital Strategy) and demonstrates it has the financial resources to deliver the Corporate Plan. This models potential changes in funding levels, new initiatives, unavoidable costs and proposed service savings.

RECOMMENDATION: That Cabinet Members:

- 1. Note the updated MTFP's for the General Fund and Housing Revenue Account and the updated Capital Programme all covering the five years 2023/24 to 2027/28 and endorse the proposals outlined in paragraphs 5.6, 5.7 and 6.2 as the approach to balancing the General Fund Revenue Budget.**
- 2. Seek recommendations from the Policy Development Groups on the appropriate fees for Services to charge and the services areas where savings should be sought and to what level.**

Relationship to Corporate Plan: The Medium Term Financial Plan (MTFP) sets out the financial resources available to deliver the Council's ongoing Corporate Plan priorities.

Financial Implications: By undertaking an annual review of the MTFP the Council can ensure that its Corporate Plan priorities are affordable. The implications of the revised budget gap are set out within the paper. Many areas require greater clarity, particularly around national funding and the possibility of additional funding to offset the implications of the cost of living crisis. Therefore a number of key assumptions underpin the reported position, which will be refined as greater clarity is received through the budget setting process.

Budget and Policy Framework: The Council has an annual legal requirement to set a balanced budget. The MTFP provides an overarching steer of what the Council can afford to deliver over a rolling five year period and is instrumental in setting the budgetary context for next year's budget setting process.

Legal Implications: None directly arising from this report, although there is a legal obligation to balance the budget. There are legal implications arising from any future consequential decisions to change service provision, but these would be assessed at the time.

Risk Assessment: The MTFP makes a number of financial assumptions based on a sensible/prudent approach, taking account of the most up to date professional advice that is available. However, many of these assumptions are open to challenge and due to this fact **Appendix 1** of this report shows the financial effect on key items in the plan if assumptions were to change (this is referred to as sensitivity analysis).

Equality Impact Assessment: No implications arising from this report.

Climate Change Assessment: The allocation of resources will impact upon the Council's ability to implement/fund new activities linked to climate change, as the MTFP sets the broad budgetary framework for the Council over the coming years. However, some provision has already been included in the base budget and further evaluation/consideration will be made as the draft budget passes through the PDGs over the next few months. Significant investment is currently forecast within the Capital Programme, however this will be dependent upon full options appraisals and levels of Grant funding available.

- 1.1 The main purpose of the MTFP is to show how the Council will strategically manage its finances in order to support the delivery of the priorities detailed in the Corporate Plan 2020 – 2024 and future years beyond that plan.
- 1.2 The MTFP links the financial requirements, constraints and objectives included in all the key planning documents of the Council (i.e. Asset Management Plan, Treasury Management Strategy, Work Force Plan, and Business Plans) which culminate in the Corporate Plan.
- 1.3 The MTFP has been a key corporate requirement for a number of years and is an essential part of the budget setting process. It provides a financial model which forecasts the cost of providing Council services over a future rolling five year period, together with an estimate of the financial resources that will be available. This model provides an early warning mechanism if there is a significant budget gap between estimated costs and available resources.
- 1.4 The MTFP helps strategically plan the budget setting process, but of equal importance, gives Management and Members an overview of future budget gaps so strategic decisions can be made over levels of future spending, Council Tax levels, policies for fees and charges, asset investment or disposal, etc.
- 1.5 In addition to considering the General Fund financial position, the MTFP also reviews the affordability of the Council's Capital Programme over the same five year period. It forecasts required capital projects (in the main focusing on essential asset replacement and health and safety items) matched against potential capital receipts and grant funding.
- 1.6 In addition to these two key areas of Council expenditure, the Council also prepares an MTFP for the Housing Revenue Account. This also shows a five year programme and outlines the key issues affecting the HRA costs and income streams from April 2023 onwards.

- 2.1 The starting base for the MTFP is the 2022/23 approved budget, which is then adjusted for any supplementary estimates approved by the Council or any significant budget variances identified in the monthly budget monitoring report to the Cabinet.
- 2.2 This base then has to be adjusted for unavoidable costs, such as, pay increases, inflation, service pressures associated with new legislation, a growing residential or business property base or improving performance, etc. The MTFP will also consider forecasts for investment receipts and income from fees and charges.
- 2.3 Finally the MTFP considers and makes assumptions regarding future levels of funding, in particular Council Tax including the potential growth in tax base, Business Rates again including any movement in the baseline as well as changes in the reliefs, multipliers and overall retention levels. Forecasts are also made for the likely level of future Central Government funding.
- 2.4 The MTFP models an overall aggregated position for the Council based on a range of assumptions. This then predicts an overall budget position, which can highlight a potential budget gap and then propose remedial action which can be taken to resolve it. Clearly, these assumptions can be challenged. They will vary due to changes in the local, national and international economic position and of course, the ongoing consequences of the cost of living and Covid-19 crises will have implications, not only for the current year, but also for the years to come.
- 2.5 The development of a five year financial model is based on a number of assumptions and perceived risks. These become more difficult to predict the further into the future you consider. In general terms a prudent/reasonable approach has been taken regarding forecasts, professional accounting guidance has been followed and external technical opinion has been sought where necessary. As a consequence, **Appendix 1** illustrates possible risks within the plan and the potential financial sensitivity to changes in the assumptions.
- 2.6 The following underlying principals have been adopted as a base assumption during the life of the MTFP:

2.6.1 Principal 1 – General Fund Reserves

- Each year the Council will target a balanced revenue budget without the use of General Fund reserve balances. The level of predicted deficits over the period of this plan may ultimately require the application of reserves to a degree to achieve the mandatory balance. However, this option is not reflected in the numbers presented and must only be considered as a last resort;

- The Council faces considerable financial risks that can have a potentially significant and immediate impact on its finances. The MTFP will attempt to ensure that the General Fund Reserve balance does not fall below the current minimum agreed level (£2m). However, this floor may be revised in light of the financial position and likely risks, or breached as a last resort to achieve a balanced budget.

2.6.2 Principal 2 – Optimise Income Generation

- Council Tax funds the largest share of the Council's budget. Annual increases will be kept within Government set guidelines. In reality this now gives the Council very little scope to significantly increase Council Tax income as the recent nationally prescribed referendum rate has been limited to a maximum of 2% or £5. This plan assumes that this rate will remain unaltered throughout the five year cycle;
- The Council will continue to look at opportunities to generate additional sustainable income. This could be through reviews of existing Fees and Charges or through new charges for discretionary services. Such charges should be set at levels that are appropriate and proportionate to the costs of the service they are delivering and the market within which they operate. The Council will continue to explore new commercial opportunities (as a 'business as usual' model is clearly no longer deliverable).

2.6.3 Principal 3 – Allocation of Revenue Resources

- Resources will be directed to high priority services and hence away from low priority services. With the exception of spend to save projects on lower priority services that can either cut future costs or increase revenue to enable cross subsidisation of higher priority services;
- It will seek to deliver further efficiency in its service delivery models and secure procurement savings in its new contractual arrangements which will then be factored into future spending plans.

2.6.4 Principal 4 – Allocation of Capital Resources

- The Council will continue to prioritise schemes, for instance to generate income, to meet corporate objectives and to enhance its asset base;
- The Council will continue to ensure it provides Value for Money through the efficient and effective use of its assets. The Council will look to dispose of surplus assets in order to maximise capital receipts and reduce ongoing revenue maintenance costs associated with holding the asset. Careful consideration will also need to be used to ensure the maximum market value is achieved when disposing of assets;
- Prudential borrowing will only be made during the life of the MTFP after the production of a fully costed business case that demonstrates how the

investment meets the Council's policy objectives, has exhausted all other external funding routes and delivers measurable improvement within a reasonable payback period;

- The Council will keep its internal borrowing under review and when appropriate will consider the potential to fix rates in the medium to long term to manage the risk and potential financial impact of interest rate increases. Consideration will also be given to whether the most appropriate funding mechanism is to fully utilise cash balances and undertake short-term borrowing to meet cash flow requirements. The Council continues to consult specialist advice to keep this under review.

2.7 These are all underpinned by a culture of Budget Ownership across all services.

3.1 As outlined above, the MTFP takes into consideration the current financial position against the 2022/23 base budget. There is significant pressure on the 2022/23 budget arising from the cost of living crisis. The Qtr1 forecast indicated an overspend of £258k on the General Fund, however since that time the initial Local Government Pay Award offer has been received and will increase that forecast substantially. Any overspend position will negatively affect reserve balances, which reduce the option to smooth this budget deficit over time.

3.2 The initial 2022/23 pay offer has been tabled and is being considered by the unions. This pay offer is significantly above that assumed in the 2022/23 base budget. The additional costs for the Council are forecast to be c£500k - £700k depending on the levels of staffing. To mitigate some of this cost, a soft recruitment freeze has been implemented. Where a role is required to maintain key service provision, for example a lifeguard or waste operative, these positions will be filled. However, where other posts become vacant, recruiting is being delayed/postposed to free up budget.

3.3 The significant increases in energy charges have also had an impact on the Council's finances. The new energy prices due to cover the year beginning 1 October 2022 are forecast to cost £350k - £375k more depending on our usage (subject to the impact of the energy cap). To mitigate this, the Council is considering options to reduce energy consumption. Examples include, lowering the heating temperature of our buildings and swimming pools. Isolating areas of buildings where heating can be switched off. Longer term plans include the use of the Salix grant to switch from Gas to renewable energies using ground and heat source pumps and increasing the volume of LED lighting.

3.4 At the beginning of the year fuel prices rose dramatically. Broadly speaking, the average price of a litre was £1.25 when the 2022/23 base budget was set. Prices rose to almost £1.75 per litre before stabilising and dropping back to about £1.60 per litre currently. The forecast addition cost of this increase is c£200k. The Council is already actively increasing the number of electric vehicles within our fleet, but is also ensuring routing is minimised within Waste Collection.

3.5 The sum of these additional pressures has added c.£1m to our cost base. Other mitigations include additional income from fees and charges. For example, we are able to sell our recyclate at higher rates than expected. Some services are experiencing greater take up, for example the Green Waste service, Planning and Car Parking.

3.6 Therefore, all options to limit costs where possible, including vacancy management processes and a review of fees and charges are being considered. However, pressures are so great that it's unlikely that this will be sufficient to compensate for the pressures the Council is seeing. Some combination of Government intervention and use of Reserves is almost inevitable.

4.1 Members will be aware that this MTFP has been developed against a backdrop of:

- an aggregate cut in Central Government Grant of c£5m between 2010/11 and 2022/23;
- an international pandemic that has had an unprecedented impact on the Council in terms of its finances, its resources and ways in which it delivers its services. Service income in Leisure and Car Parking remains materially lower than pre-covid-19 levels. The national debt has risen to £2.4 Billion at the end of March 2022, 99.6% of GDP¹, which will need to be repaid indicating that austerity measures are likely to continue;
- the invasion of Ukraine which has significantly impacted the availability and therefore price of energy and fuel, leading to a cost of living crisis not seen since the early 1980's. It has required the reallocation of Council resources into supporting the Government with their Energy Rebate and Homes for Ukraine schemes;
- Political change at a national level leading to uncertainty and emergency policy decisions being taken that have unsettled the financial markets. Interest rates have soared over the course of the summer.

Yet the Council continues to deliver a wide range of well performing services.

4.2 This Medium Term Financial Plan (MTFP) has been developed to provide a financial framework within which the Council can deliver the priorities in the Corporate Plan. This strategy focuses on the forward financial issues/pressures facing the General Fund and Capital Programme.

4.3 There are still some fundamental issues that have not been resolved or are still to be fully evaluated. These issues may either improve or worsen the summary budget position currently reported and are covered in Section 7 of this report, but can be summarised as follows:

¹ Office for National Statistics - [UK government debt and deficit - Office for National Statistics \(ons.gov.uk\)](https://ons.gov.uk/economy/publicsectordebttax/governmentdebtanddeficit)

- Any changes in policies and legislation following the appointment of the new Prime Minister. One such change has been to scrap the recently implemented increase in National Insurance to fund the NHS and Social Care Reforms;
 - The impact of the emergency “Mini Budget” and the “Medium Term Fiscal Plan” due to be announced on 31 October and their consequences for the Local Government Financial Settlement due in December;
 - The ongoing impact of the Cost of Living crisis, the likely recession as a consequence and whether local government will receive any financial support;
 - Changes to Central Government funding schemes such as Business Rate allocations/mechanics;
 - Ongoing implications of Covid-19, particularly on service income from fees and charges;
 - Ongoing service reviews (including changes to fees and charges) as services look to improve the efficiency and effectiveness of their delivery.
- 4.4 Although Spending Review 2021 (SR21) covered the period 2022/23 to 2024/25, events since its publication are expected to render the contents almost irrelevant; the real terms growth of 9.4% across 2021/22 to 2024/25² is unlikely to be affordable despite reassurance from the Prime Minister that the Government is “absolutely not cutting public spending”.
- 4.5 Following SR21, a 3-year financial settlement was expected, but only a one-year roll forward settlement was awarded. Many aspects of the government’s reforms to the Local Government Finance system (first promised in 2016) were not resolved in time for April 2022 and the new Local Government Minister (Paul Scully MP) has confirmed at the recent Conservative Party Conference that it will not happen during this Spending Round. Therefore, the figures currently used to allocate local government funding will remain based on spending needs from 2013/14.
- 4.6 During this year’s Local Government Association’s (LGA) annual conference the then Secretary of State for Levelling Up, Housing and Communities (DLUHC) announced a two year settlement giving “certainty and confidence”. Realistically, this can only be achieved through another roll forward of the current settlement. However, with a new Prime Minister and Secretary of State and financial uncertainty, it is questionable whether the two-year settlement will be possible. This clearly makes forecasting for future years very difficult.

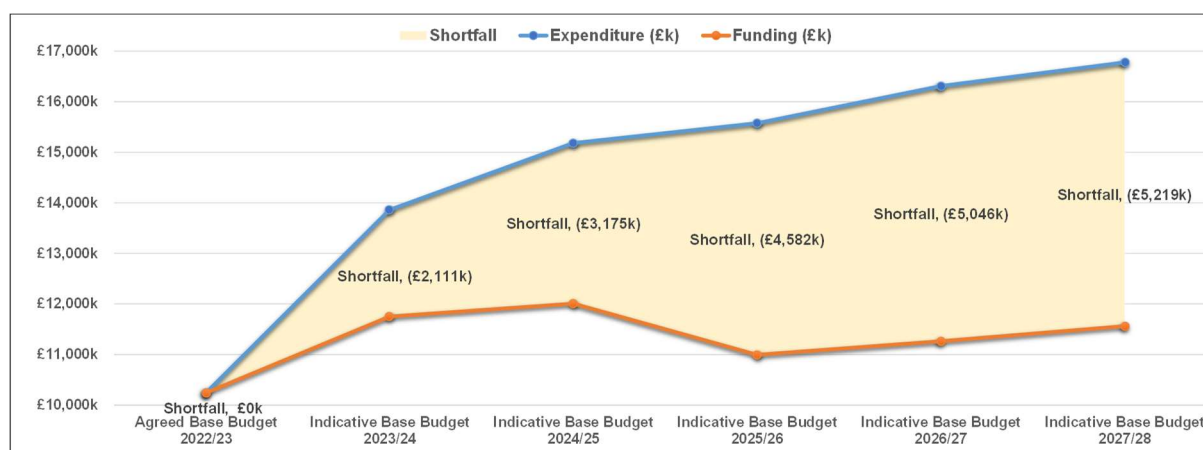
² Spending Review 2021 – Table 1.16 Departmental Budgets - Total DEL (TDEL) excluding depreciation
[Autumn Budget and Spending Review 2021: A Stronger Economy for the British People](https://www.gov.uk/government/publications/autumn-budget-and-spending-review-2021-a-stronger-economy-for-the-british-people)
publishing.service.gov.uk

5.1 Table 1 and the associated graph shown below, gives a summary position for the MTFP over the next five years, with greater detailed information is shown in **Appendix 2**. This shows an overall deficit of £5,219k over the 5-year life of the plan, equivalent to approximately 35% of the current Net Service Cost.

Table 1 – MTFP General Fund Summary

2022/23		2023/24	2024/25	2025/26	2026/27	2027/28
£000		£000	£000	£000	£000	£000
10,240	Expenditure	13,863	15,182	15,575	16,309	16,780
(10,240)	Funding	(11,751)	(12,007)	(10,993)	(11,262)	(11,561)
0	Annual Shortfall	2,111	1,063	1,408	464	173
0	Cumulative Shortfall	2,111	3,175	4,582	5,046	5,219

Graph 1 – MTFP General Fund Cumulative Budget Gap 2022/23 to 2027/28



5.2 Due to the cumulative nature of this plan, if the Council balances its revenue spend to its available funding, each subsequent year will only then need to find the difference (the annual shortfall). However, if no remedial action is taken to reduce the overall level of spend, the MTFP predicts an estimated cumulative shortfall on the General Fund budget of £5,219k. At present the General Fund reserve of £2,215k would be insufficient to absorb the deficits over this period, although is sufficient to cover any individual year's shortfall.

5.3 The majority of this cumulative deficit impacts during years one to three largely due to the cost of living crisis during years one and two based on the expected relatively quick economic recovery, and year three based on assumed reductions in funding across Business Rates and Government Grants after years of delays.

5.4 This is clearly a challenge based upon a number of assumptions, caveats, decisions based upon external advice and the most up to date information available at this time. Clearly, any major variations in these assumptions would require a fundamental review of the Council's MTFP and would be reported

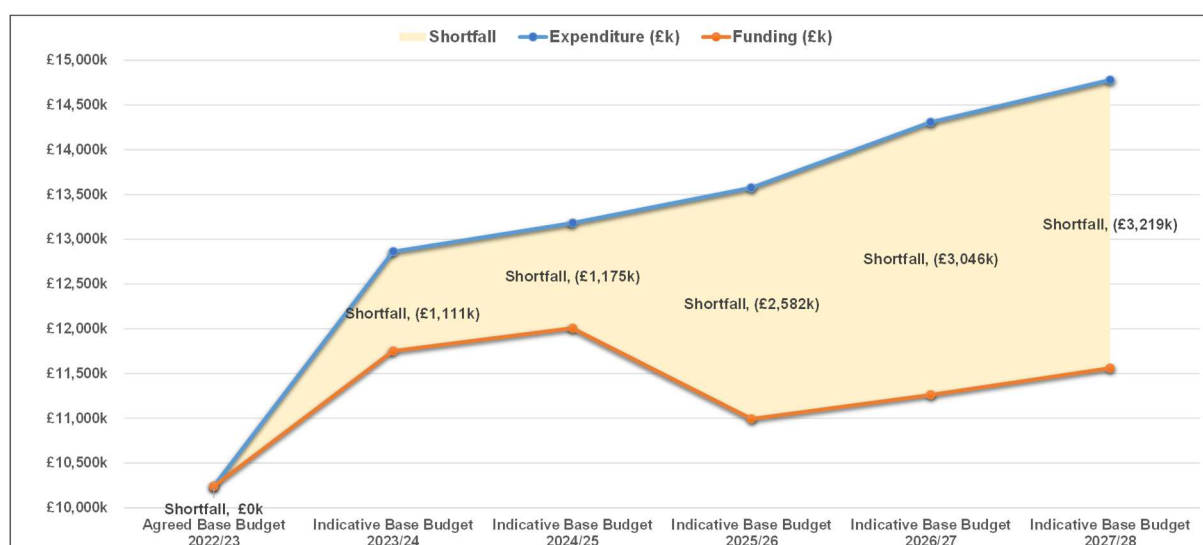
back to Cabinet and the wider Membership as soon as practical, coupled with proposed courses of action that could be implemented.

- 5.5 The Council has a legal requirement to set a balance budget and needs to ensure its overall costs are affordable i.e. they can be funded through income and planned short-term use of reserves. Members therefore need to take the necessary decisions and actions to manage net spending within affordable limits.
- 5.6 During the summer, Leadership Team and services have been reviewing a range of budget options that could be considered in order to help mitigate that remaining budget shortfall across the five years of this MTFP with a view to identifying a net £1m saving in both 2023/24 and 2024/25. Indicative areas where possible budget savings could be found are shown in **Appendix 3** and will form the basis of the discussions with the Policy Development Groups (PDG's). In addition the PDG's will be asked to identify further options to resolve the immediate budget gap for 2023/24 and future years.
- 5.7 Part of that saving could come from increasing income from Service Fees and Charges. In many cases, these have not been increased for up to three years in order to promote the recovery from Covid-19. However, during that timeframe costs have increased, for example general inflation has increased prices by nearly 16% since April 2019. Therefore Service Fees and Charges will be reviewed to ensure they cover the cost of the service provided and where possible any new proposed fees will be implemented as soon as possible to assist the in-year shortfall. The views and recommendations from the Policy Development Groups will also be sought in setting Service Fees and Charges based upon options provided within Part 2 reports to lead members through current considerations.
- 5.8 Based upon delivering £1m savings in both 2023/24 and 2024/25, the forecast MTFP position improves as shown in Table 2 below.

Table 2 – Revised – MTFP General Fund Summary

	2023/24	2024/25	2025/26	2026/27	2027/28
	£000	£000	£000	£000	£000
Initial Annual Shortfall	2,111	1,063	1,408	464	173
Assumed Savings	(1,000)	(1,000)	0	0	0
Revised Annual Shortfall	1,111	63	1,408	464	173
Cumulative Shortfall	1,111	1,174	2,582	3,046	3,219

Graph 2 – Revised MTFP General Fund Cumulative Budget Gap 2022/23 to 2027/28



5.9 Clearly there remains a significant budget shortfall in 2023/24 even if the £1m is identified and delivered. Therefore, all possible options to increase income or reduce costs must be considered. Options will be brought forward for consideration over the next few months in the run in to setting the 2023/24 budget in February 2023.

6.1 Many of the issues, assumptions and sensitivity of items included within the MTFP are complex, often inter-related and will undoubtedly be subject to variation and ultimately fundamental review depending on the levels of future funding reductions. However, strategic decisions have been ongoing to reduce the current and future operational costs.

6.2 In order to reduce the forecast deficit the Council will strive to constantly manage its costs and revenues by:

- Ensure fees/charges are revisited regularly and that the Council are charging appropriately for all items possible.
- A continued reduction of service and employee costs – which may incur short term upfront costs.
- Continue and expand partnership working where practical.
- Investigation of a number of spend to save projects.
- Review the current and future property asset requirements.
- Maximise procurement efficiencies.
- Explore new commercial opportunities.

- Examine different ways of delivering services to reduce costs.
 - Continued benchmarking and learning from best practice.
 - Consideration of growing the commercial property base to align delivery with Government funding priorities.
- 6.3 The above plans will require all service areas to play an active role in securing future savings and the Council will also continue to consult with all of its major stakeholders, especially the tax payers, to ensure all future budgetary decisions accord with their priorities.
- 6.4 Members will appreciate that some of the indicative savings and changes to Service Fees and Charges will require political support and therefore if some suggestions are deemed to be unacceptable then other savings will need to be proposed.
- 6.5 The level of uncertainty in funding and external pressures as outlined in Section 7 makes forecasting difficult and with it a need to highlight risks and the need to push for further efficiencies within services.
- 7.1 Ongoing risks and uncertainty for the budget at this stage include:
- 7.1.1 **Future Local Government Funding** – the Council awaits to hear whether the announced government spending limits over the years 2023/24 and 2024/25 remain valid given the current economic circumstances. Whatever the spending limits are, these then need to be translated into individual Council funding. These will be dependent upon the Governments views on the long term funding requirement and allocation mechanism. Therefore, it is critical that we continue to lobby for the Fair Funding Review and holistic review of Business Rates to be completed fully as soon as possible, along with the implementation of any replacement of the New Homes Bonus Scheme.
- 7.1.2 **Local Government Finance Settlement (LGFS)** – the Council await the Provisional Settlement expected to be announced in December, potentially covering 2023/24 and 2024/25. The previous multi-year settlement expired in 2019/20 and for the last three years has simply been rolled forwards as the sector awaits the outcomes of the much delayed Fair Funding Review. Whilst a multi-year settlement offers some certainty over the level of grants, there will be further risks and changes which will affect 2023/24 budget setting.
- 7.1.3 **Cost of Living Crisis / Inflation** – As highlighted previously in this report, the cost of living crisis is having a significant impact upon the Council's finances. To dates, little has been done to help Council's deal with the current implications. It is hoped that some ongoing support / mitigation is included within the 2023/24 funding settlement.

To combat high inflation, the Bank of England Base Rate is increased to reduce spending levels. Whilst this provides a greater return on our investments, this has a significant impact on the interest rates the Council is able to borrow at. With the significant growth in the Capital Programme primarily to deliver additional homes across the district, additional borrowing will be required. This is likely to reduce / slow the deliverability of such projects.

7.1.4 **Council Tax** – The MTFP is based on the assumption of a maximum 2% increase on a Band D property each year. This may of course not be possible due to Central Government restrictions. This is only likely to be known on an annual basis as each Settlement is announced. There is lobbying to remove, or relax, the referendum limit

7.1.5 **Council Tax Base** – The 2022/23 budget assumed a recovery in the collection rate, which is not currently being achieved. This MTFP must consider the impact of the cost of living on collection rates and therefore forecasts it to be prudent to reduce as was the case during the Covid-19 pandemic. Recovery can be estimated back to the normal 98% by 2025/26. Future long term growth relies on the large scale infrastructure projects such as J28, Tiverton Eastern Urban Extension and Culm Garden Village.

7.1.6 **100% Business Rates Retention / Revaluation** – In the Autumn Statement 2015 the Government confirmed its intention to allow local authorities to keep 100% of business rates income by 2020. As with the fair funding Review, any proposed changes have been significantly delayed, with no changes to be brought in before 2025/26. A full or partial reset of this baseline will divert resources away from Mid Devon. The sector also awaits what transitional measures will be included to smooth this detrimental impact.

The next revaluation of properties for Business Rates will take effect from 1 April 2023 based on the rental market at 1 April 2021. During the summer, the Government consulted upon options for transitional arrangements. It is assumed that the Council's income will not be impacted by the Revaluation, or will be smoothed with transitional support. This might not be the case.

7.1.7 **Levelling up Fund** – At present, the Council is awaiting the outcome of its second bid for substantial funding to support the Cullompton HIF Project. Should the bid not be successful, plans to deliver the major infrastructure project will require rethinking and the identification of other funding sources. Even if successful, there may be knock-on implications as yet unknown that come to light that have financial consequences.

7.1.8 **Covid-19** – Although all forms of financial support from Government have ceased, the Council is still experiencing a significant drop in service income levels. Leisure and wellbeing provision has been put at significant

risk with patronage levels being slow to recover. Car parking income is affected as many continue to work from home, or shop online instead of on the high street. These “new ways of working” appear to signal a step change in behaviour and a permanent reduction to income levels.

7.2 Other Uncertainties:

7.2.1 Homes for Ukraine Scheme – Part of the national support to the Ukraine is to offer safe housing for those escaping the conflict. Additional funding is being received to support the scheme. However, the first minimum period of six months accommodation will soon end and it is not clear whether there will be options to relocate families to other hosts or to private landlords. Therefore there is a risk that some of those initially covered by the scheme could present as homeless and require the Council to house them. Less, if any, associated funding will be available to cover those additional costs.

7.2.2 Inflation –rates have increased rapidly over the last 18 months reaching levels not seen since the late 1970's / early 1980's. Initially this was caused by the Covid-19 measures taken in 2020 by the Government, such as Eat Out to Help Out and the reduction in VAT. In recent months, the conflict in Ukraine has caused energy and fuel prices to increase significantly. The Bank of England and the Government's “Mini Budget” have taken steps to limit the impact of inflation and it is currently expected that inflation will be back in line with the Government's 2% target within 2-3 years. This is critical for the Council as it will feed into 3rd party contract prices and pay inflation.

7.3 All of the above items highlight once again just how difficult it is to forecast ahead with any degree of accuracy. Nevertheless, the MTFP helps us examine the likely trends to assist in setting realistic capital and revenue budgets going forward.

8.1 The Council should look to match on-going spending plans to available in-year resources. However, it currently holds an uncommitted General Fund Reserve with a balance of £2,215k, which is above the current balance of £2m set by Full Council.

8.2 The Council holds this reserve for a number of reasons. Firstly to deal with any short term cash flow or funding issues. Secondly to provide a contingency for exceptional one-off acts (i.e. flooding, fire, terrorism, business rate failure, etc.) and, thirdly to provide a buffer for known circumstances whose final affect is unknown (i.e. changes in legislation or major funding changes). Clearly, the more uncertainty that exists, the higher the balance required to mitigate this risk. This level of minimum reserves is assessed annually to ensure it is adequate.

8.3 As stated above, this plan does not include any utilisation of these reserves. However, with the scale of the deficit, it is conceivable that some utilisation could

be necessary. If so, this should be on the basis that the reserve is replenished by the end of the MTFP period.

- 8.4 The Council also holds Earmarked Reserves which have been set aside for a specific purpose, such as sinking funds for asset replacement. The overall balance has increased markedly in 2020/21 largely due to the Council holding balances relating to Covid-19 grant funding and government requirements to spread the impact of Collection Fund losses over a three-year period. Therefore we will see these unwinding and being utilised over the current year and future years. Although these reserves are ring-fenced and not available to support the budget, a review of all earmarked Reserves is undertaken annually and any identification of funding no longer required to be earmarked can be released and could be used to support the budget. As these funds are one-off, they should not be used to support ongoing expenditure and therefore only delay the requirement for the identification and implementation of a sustainable saving.
- 9.1 The Overall Capital Programme will include new bids for capital funding to support new programmes as well as ‘rolling’ approvals from current and prior year’s Capital Programmes. However, at this point in the process, there is no inclusion of current approvals or slippage within this Capital MTFP projection; this is purely new bids or bids seeking additional funding to supplement the current approval.
- 9.2 A forecast of the expenditure within the current approved programme will be brought to February budget setting with final approval sought to carry forward the approval at Outturn. However, as at Quarter 1 of the current Financial Year, the total of current approvals planned to start between 2023/24 to 2026/27 were:

Table 3 – Current Future Capital Approvals

	2023/24	2024/25	2025/26	2026/27	Total
General Fund	£29,995k	£536k	£0k	£0k	£30,531k
HRA	£7,192k	£3,444k	£315k	£0k	£10,951k
Total	£37,187k	£3,980k	£315k	£0	£41,482k

- 9.3 Therefore all schemes included within this Capital MTFP are new and have not yet started or received formal approval. In February, Member’s will be asked to approve the Year 1 programme and note the indicative future years.
- 9.4 Table 4 below, shows the forecast capital funding position during the life of the MTFP. This is based upon limited information on the sources of potential funding, particularly in late years. Therefore at this time, the overarching assumption is any unfunded element of the programme is covered through external borrowing. This will be refined and updated as we move through the MTFP timeframe. A more detailed analysis of the overall schemes and potential funding is attached as **Appendix 4**.

Table 4 – Projected Capital Approvals

	2023/24	2024/25	2025/26	2026/27	2027/28	Total
	£000	£000	£000	£000	£000	£000
General Fund:						
New Bids	20,814	7,440	1,870	1,600	1,165	32,889
Funded by:						
Revenue / Receipts / Grant Funding	(19,519)	(2,760)	(860)	(1,312)	(655)	25,106
PWLB Borrowing (varying years)	(1,29)	(4,680)	(1,010)	(288)	(510)	7,783
Total Funding	(20,814)	(7,440)	(1,870)	(1,600)	(1,165)	(32,889)
Housing Revenue Account:						
New Bids	61,839	9,135	16,060	3,285	2,770	93,089
Funded by:						
Revenue / Receipts / Grant Funding	(23,705)	(5,674)	(9,616)	(3,285)	(2,770)	45,050
PWLB Borrowing (50 Years)	(38,134)	(3,461)	(6,444)	(0)	(0)	48,039
Total Funding	(61,839)	(9,135)	(16,060)	(3,285)	(2,770)	(93,089)
Overall Capital Requirement	82,653	16,575	17,930	4,885	3,935	125,978
Overall Existing / Grant Funds	(43,224)	(8,434)	(10,476)	(4,597)	(3,425)	(70,156)
Overall PWLB Borrowing	(39,429)	(8,141)	(7,454)	(288)	(510)	(55,822)

The spend profile of these bids is as follows:

	2023/24	2024/25	2025/26	2026/27	2027/28	Total
	£000	£000	£000	£000	£000	£000
General Fund	4,173	22,396	3,555	1,600	1,165	32,889
HRA	14,213	28,528	24,333	22,885	3,130	93,089
Total	18,386	50,924	27,888	24,485	4,295	125,978

9.5 Expenditure

9.5.1 The MTFP shows the strong inter-relation between the General Fund and delivering a sustainable Capital Programme. The significant increase in the forecast capital expenditure has implications for the Revenue budget that are captured by this MTFP. Any variation to, or slippage in, the current programme will also need to be reflected.

9.5.2 The draft Capital Programme will be reviewed/challenged by the Capital Strategy Asset Group (CSAG) prior to the proposed final programme being brought forward for approval in February.

9.5.3 As highlighted in the 2022/23 Capital MTFP, there is a marked increase in the borrowing requirement over the duration of the MTFP from recent years. This is largely due to a significant plan to increase the HRA Housing stock. At present, we await the latest Business Plan from 3Rivers. Once approved, the associated financial implications will be incorporated into the programme.

9.5.4 Generally, the bids are restricted to replacement equipment, largely based upon health and safety requirements in the leisure centres, new ICT kit or invest to save bids. A bid is included that will help the Council deliver its commitment to climate change and reducing carbon emissions. It is anticipated that external

funding will fund these bids, but if the Council is unsuccessful in bidding for such funding, undertaking borrowing could be considered.

9.5.5 Similarly, there is an assumption that the Cullompton Housing Infrastructure Funded (HIF) project will be fully funded from various government grants including the current levelling up bid. Funding was been received to cover the initial projected estimated cost of the projects, however, costs have dramatically increased since that funding was received. Should the bid be unsuccessful a second time, consideration would need to be given to alternative sources of funding, or indeed whether the project is stopped. The Tiverton project has been removed from the future programme following the decision by Cabinet.

9.5.6 All capital projects are subject to a full appraisal.

9.6 Funding

9.6.1 The available capital receipts are based on a prudent basis, with no major asset sales (other than right to buy sales) factored into the model. Similarly, prudent assumptions are included for the availability of Capital Grant to help mitigate some of the proposed costs. If additional receipts are generated, or grant received, the capital prioritisation list could be revisited to bring forward new schemes into the programme or decrease any borrowing requirement.

9.6.2 Currently any revenue contribution to the Capital Programme is limited to funding held within Earmarked Reserves (i.e. Sinking Funds). No additional use of the New Homes Bonus grant is planned to fund elements of the Capital Programme. However, as previously stated, the current New Homes Bonus scheme was due to cease in 2022/23 and a replacement scheme is expected, but is yet to be announced. Ultimately, any outstanding funding requirement after utilising revenue contributions, reserves and any external funding sources will need to be funded through Prudential Borrowing.

9.6.3 A prudent assumption has been included for the utilisation of 1-4-1 receipts or for additional grant funding to be made available from Homes England against new additional housing at 40% or 45% respectively; although a substantial element of the cost remains with the Council.

9.6.4 The Council currently operates a policy of “internal borrowing” whereby it utilises its cash balances rather than undertaking new loans. It is recommended that the Council continues to maximise its use of internal borrowing rather than seeking to fund projects through new external borrowing whilst cash balances remain above £10m. One option would be to reduce that minimum cash balance of £10m and meet and shortfall in cash flow through short-term borrowing. This is the cheapest form of borrowing in the current economic conditions. This option will be considered and developed in time for the February budget setting.

9.6.5 However, given the scale of the proposed Capital Programme, internal borrowing will not be sufficient to fund all bids. To minimise the increase in inflation, the Bank of England has increased the Bank Rate from the historic low

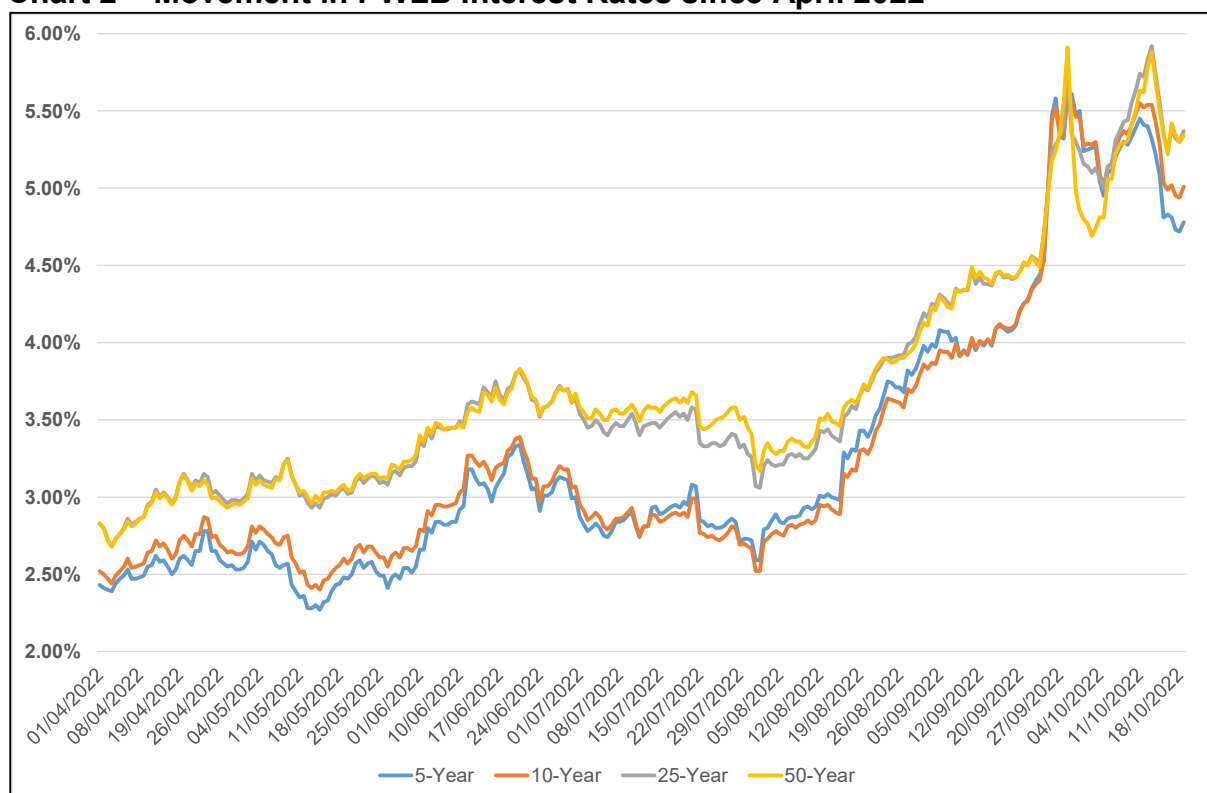
of 0.1% to 2.25%³ currently. Further increases are expected over the next year as shown in the table below:

Figure 1: Forecast Interest Rates increases from our Treasury Advisor⁴:

Link Group Interest Rate View 27.09.22												
	Dec-22	Mar-23	Jun-23	Sep-23	Dec-23	Mar-24	Jun-24	Sep-24	Dec-24	Mar-25	Jun-25	Sep-25
BANK RATE	4.00	5.00	5.00	5.00	4.50	4.00	3.75	3.25	3.00	2.75	2.75	2.50
3 month ave earnings	4.50	5.00	5.00	5.00	4.50	4.00	3.80	3.30	3.00	2.80	2.80	2.50
6 month ave earnings	4.70	5.20	5.10	5.00	4.60	4.10	3.90	3.40	3.10	3.00	2.90	2.60
12 month ave earnings	5.30	5.30	5.20	5.00	4.70	4.20	4.00	3.50	3.20	3.10	3.00	2.70
5 yr PWLB	5.00	4.90	4.70	4.50	4.20	3.90	3.70	3.50	3.40	3.30	3.20	3.20
10 yr PWLB	4.90	4.70	4.60	4.30	4.10	3.80	3.60	3.50	3.40	3.30	3.20	3.20
25 yr PWLB	5.10	4.90	4.80	4.50	4.30	4.10	3.90	3.70	3.60	3.60	3.50	3.40
50 yr PWLB	4.80	4.60	4.50	4.20	4.00	3.80	3.60	3.40	3.30	3.30	3.20	3.10

9.6.6 The increases in PWLB interest rates has been heightened by the financial markets reaction to the Government's "Mini Budget". There has been significant volatility in the rates since that announcement and it is only likely to calm/settle once the Chancellor announces his "Medium Term Fiscal Plan" due to be announced on 31 October. Chart 2 below shows the movement in PWLB interest rates since April 2022.

Chart 2 – Movement in PWLB Interest Rates since April 2022



9.6.7 This will add substantial interest charges on borrowing compared to recent levels. For example, 50-year annuity borrowing as at 18 October 2022 was 5.34% (excluding the certainty rate discount). The equivalent rate on 18 October

³ At the time of writing the report

⁴ Latest update from our Treasury Advisor (Link Group).

2021 was 2.42%⁵. For each 1%, the additional cost is c£8k per annum, or for each additional £1m borrowing requirement the additional cost is c£40k per annum and is expected to increase over the coming months/year. Therefore, the Council will need to carefully consider how best to fund the capital funding requirements.

10.1 The HRA is a ring-fenced account within Mid Devon's financial accounting system. This means that a balanced budget must be set each year including all income and expenditure pertinent to the Council's landlord function and excluding all other income and expenditure (since this would be captured as part of the General Fund budget).

10.2 The draft HRA MTFP for 2023/24 to 2027/28 is summarised below, with greater detail included within **Appendix 5**.

2022/23		2023/24	2024/25	2025/26	2026/27	2027/28
£000		£000	£000	£000	£000	£000
7,722	Direct Expenditure	8,497	8,814	9,084	9,413	9,704
(13,456)	External Income	(14,064)	(14,826)	(15,674)	(16,410)	(17,182)
(5,734)	Net Cost Of Services	(5,567)	(6,012)	(6,591)	(6,996)	(7,478)
981	Capital Financing Costs	1,010	1,191	1,338	1,748	2,151
925	Interest Payable	1,178	1,855	2,573	3,092	3,256
3,828	Indirect Expenditure	3,640	3,728	3,598	3,669	3,602
0	Budget (Surplus) / Deficit	261	762	919	1,512	1,531
0	Cumulative (Surplus) / Deficit	261	1,023	1,942	3,454	4,985

10.3 As per the General Fund budget, the cost of living is having a substantial impact to the HRA. The proposed pay award is impacting in 2023/24 and the increase in interest rates is impacting on the forecast financing costs for the planned build programme to add/update the housing stock. Given the forecast increases in interest rates, this situation might worsen further than our prudent estimates.

10.4 Work is underway to assess the various options open to the HRA to enable it to continue with some development of new/replacement housing stock within an affordable envelopment. However with interest rates at current levels or above, some rationalisation of the ambition will be necessary. Options being considered include:

- Funding options – including use of the Housing Maintenance Fund (HMF);
- Reduced development of new/replacement units;
- Delaying development of new/replacement units until interest rates fall;
- Revise the mix of Social and Affordable units set against Government rent levels;
- Review the quality of the units;
- Focus of those sites that deliver the best value for money;

⁵ [Historical Interest Rates \(dmo.gov.uk\)](https://dmo.gov.uk/historical-interest-rates)

- Consider developing only new units, not replacement until interest rates fall back.
- 10.5 The same broad assumptions applied to the General Fund across pay and pensions, utilities and fuel increases have also been applied to the HRA. **Appendix 1** of this report shows the sensitivity analysis on key items in the plan if assumptions were to change. In addition, provision has been made for specific investments, for example it is proposed to create a fund to increase the number of apprentices.
- 10.6 On the income side, the government have recently consulted on capping the increase applicable to social rents. For rent periods from 1 April 2023 to 31 March 2024, the CPI plus 1 percentage point limit on annual rent increases is subject to a 5% 'ceiling'. Therefore, an assumption has been made to apply the 5% cap as this is highly likely to be the maximum rate allowable. This is however, less than the HRA cost pressures will be increasing over the same period. Future year's rental uplifts are assumed to pair back from this value, to 3% which is felt to be appropriately prudent.
- 10.7 Recognising that this adds to the pressures of our tenants, it is proposed to re-increase the provision for bad debts by £100k in 2023/24, as was the case when Covid-19 first arose. That increase is fully reversed in 2025/26 as debts recover to pre-Covid-19 / cost of living crisis levels fall, but again a prudent assumption has been applied at this time.
- 10.8 Further mitigations to the difference between our cost increases and our income cap include a prudent assumption over the lost rental income as houses are sold through the Right to Buy scheme – assumed net loss of 12 units per annum after including those that the Council re-purchase. However, this might increase if development of new units continues as planned. We are also working to reduce the void turnaround times meaning that less properties sit empty at any one time, thus generating no rent.
- 10.9 Due to the current economic climate it is also assumed that garage ground rents will be retained at their current level, £275 per annum. This can be reviewed in the future when we may have more economic certainty.
- 10.10 Any surpluses generated by the HRA are used to contribute to the Housing Maintenance Fund (HMF). This fund is designed to meet any spikes in the cost of major works in the HRA's plan to 2048. This plan is being reviewed to clarify how much HMF is required, and therefore if any can potentially be used to support the development programme.
- 10.11 The combination of inflating expenditure more than income, along with the consequence of the significant capital investment leaves no assumed value to be transferred to the HMF across the MTFP period. All years forecast a deficit and therefore draw on the HMF at this time. However, the HMF currently holds nearly £15.9m, but in order for this to avoid reducing too far, savings or further income generation proposals will need to be identified.

- 11.1 Clearly there is a very strong link between finance and corporate/service performance. By integrating the MTFP, the Work Force Plan and the Corporate Plan, the Council can demonstrate how it will afford to deliver its key objectives. This will also shape the ongoing priorities of the Council, as with finite resources it will need to decide on what its key priorities are.
- 12.1 The MTFP will continue to be updated on an annual basis. This will ensure that it will be a live document, subject to amendment and review by Leadership Team and Members and will provide a clear guide prior to commencing the annual budget setting process in future years.
- 13.1 Like all councils, Mid Devon is facing an ongoing and very challenging financial future. The Corporate Plan will need to be aligned to available financial resources (which will include a regularly updated Work Force Plan) so that the District can be best placed to maximise cost effective delivery of its services that are valued by its residents.
- 13.2 It should also be noted that Management will continue to play a pro-active role in both reducing ongoing service costs and exploring new possibilities to raise additional income.
- 13.3 Having a realistic financial plan for the next five years will enable the Council to ensure it is allocating its limited financial resources to its key priorities. The current Corporate Plan sets out the Council's goals/objectives over a four year period and must clearly be matched by the financial resources that are available. The Government's move from a relatively fixed core funding system to more of a '*payment by results*' process has introduced a lot more uncertainty and volatility for the future of the Council's funding streams, which makes medium term financial planning an even more challenging process.
- 13.4 Like any strategic plan, the MTFP has been compiled based upon all available information at a fixed point in time. Clearly, as time moves on assumptions will change, Central Government will set new targets, bring in new legislation and adjust funding levels. The Council is aware that the Fair Funding Review may, in time, bring significant changes in its core funding including a full or partial Baseline reset in Business Rates. Residents' expectations will change, Member priorities will alter and therefore any plans must be flexible enough to cope with major changes. As the Council is already in a period of major financial uncertainty, it is not only prudent but imperative that it seeks to maintain its reserve levels to the fullest extent possible. Moving forward Members will be provided with regular updates on the financial impact of any variation to what has been previously assumed.

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Circulation of the Report: Cabinet, Cllr Andrew Moore, Leadership Team

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Key Assumptions used in Medium Term Financial Plan

A number of assumptions have been made in formulating the strategy. Clearly some of these are harder to predict than others and in addition the magnitude of the “error” of prediction may be greater in certain specific areas. Detailed below are the main assumptions made and importantly an analysis of the sensitivity to variance.

As previously mentioned, many of the assumptions could be subject to challenge and may well alter during the life of the MTFP. Therefore, it is important to show the magnitude (or sensitivity) in financial terms of minor alterations to assumptions made.

Inflation

Future inflation is of course an unknown quantity. At the present time, where inflation is at its highest for over 40 years, it has never been more critical to use as realistic assumptions as possible.

The level of inflation assumed in this plan is therefore high and it could come to pass that the actual inflation figures are higher, having a significant impact on our medium terms projections. The sensitivity analysis below provides some context for the scale of any variation from the forecast.

The forecast inflationary increases across this MTFP period are (applicable to both General Fund and HRA – as appropriate):

	2023/24 %	2024/25 %	2025/26 %	2026/27 %	2027/28 %
Staffing*	5%	3%	2%	2%	2%
NDR on Council Properties	2%	2%	2%	2%	2%
Gas[#]	170%	50%	25%	12.50%	6.25%
Electric[#]	67%	50%	25%	12.50%	6.25%
Water	5%	2%	2%	2%	2%
Members Allowances*	5%*	3%	2%	2%	2%
Insurance	10%	3%	3%	3%	3%
Fuel[~]	40%	5%	5%	5%	5%
Leisure Fees and Charges	5%	3%	2%	2%	2%
Support Service Recharge to HRA	5%	3%	2%	2%	2%

A change in the inflation factors causes the following movements:

	2022/23 Budget £k	Inflation Assumption %	2023/24 Forecast Financial Impact £k	(+/-) 1% Change £k
Staffing*	13,598	5%	1,152	127
NDR on Council Properties	696	2%	14	7
Gas[#]	100	170%	170	1
Electric[#]	275	67%	184	3
Water	141	5%	7	1
Members Allowances*	339	5%	18	3
Insurance	236	10%	24	2
Fuel[~]	450	40%	180	4
Leisure Fees and Charges	(2,628)	5%	(131)	(26)
Support Service Recharge to HRA	(1,715)	5%	(86)	(17)
TOTAL	11,493		1,532	102

*The 2023/24 Pay inflation also includes a cash increase of £450k in respect of 2022/23 over and above the 2% budgeted. This is based on the current pay offer that is out to trade union consultation and is equivalent to approximately 3% extra (5% in total).

#The increase in energy budgets reflects the increase in prices expected to come into effect from October 2022. Prices will be available shortly as all energy is purchased in advance of need. It is expected that the recent announcement from the new Prime Minister will offer a degree of protection on the increase and it is hoped that annual increase reduce over the remainder of the MTFP period.

~The fuel increase largely reflects the increases experienced in 2022/23, which have currently stabilised and begun to fall back.

Localised Tax Funding

Internal estimates have used to project the levels of Council Tax and Business Rates income over the five year period.

The Council Tax taxbase forecasts growth in line with the Local Plan. This equates to approximately 350 homes and contributes approximately £80k per annum. A prudent collection rate, in line with the reduced forecast during the Covid-19 pandemic of 96%, is expected. Recovery to the normal 98% is expected over the life of the MTFP. The assumed annual increase in the Band D charge is in line with the Governments recent referendum limits at 2%. Each £1 increase in Council Tax generates approximately £33k. It should be noted that extra housing also affects the Council's cost base too, i.e. waste collection, street cleaning etc.

The key Business Rates assumptions are:

- that the expected Baseline Reset will be delayed until 2025/26, as recently confirmed. The Baseline Reset will update the baseline year(s) used in the Settlement funding model. Given the impact of Covid-19, the latest year this is likely to use is 2019/20 and therefore a degree of local growth will be lost depending on the method of the reset applied. At that time, the assumption is that the reset will remove approximately half of the growth in the retained income since the introduction of the baseline in 2013/14, which equates to approximately £500k. No expectation of transitional support or use of the Business Rates Smoothing Reserve is currently assumed, but is available and could well happen;
- that the 2023/24 Revaluation will not reduce the authority's retained income. In theory the Revaluation is cost neutral nationally, but this is difficult to prove and inevitably there will be winners and losers at locality level. Any loss is therefore assumed to be offset by transitional support – this might not be the case;
- the estimate is for a minimal growth in the overall Rateable Value and the national multiplier in 2023/24, which is normally linked to CPI inflation. This assumes that the government will protect businesses from significant tax increases during this cost of living crisis. Growth in future years is based upon a 1% increase. Anything above this will benefit the council.

A 1% variation within these assumptions is very difficult to calculate as each could impact onto the other. For example, a significant increase in the annual multiplier, or the rateable value arising from the Revaluation could potentially force a business to close, which would consequently reduce our retained income. Therefore, an overall movement of 1% in our retained income equates to approximately £35k.

Government Funding

Most forms of Government funding is included within the Local Government Financial Settlement provided by the Department for Levelling Up, Housing and Communities (DLUHC). Earlier this year the former Secretary of State announced at the Local Government Association annual conference that there would be a two-year settlement covering 2023/24 and 2024/25. This indicates that it is highly likely to be another roll forward settlement. As such, the current assumption is for a cash freeze in 2023/24 and 2024/25. However, there are the following considerations:

- Rural Services Delivery Grant – this has generally been static over the last 4 years, so has been assumed to remain at previous levels.
- Lower Tier Services Grant – was announced as one-off in 2020/21 but was awarded again in 2022/23, but the value reduced from £179k to £101k.
- New Homes Bonus Scheme – Previously announced to cease in 2022/23, and as yet no replacement scheme has been announced. The source of the funding was topsliced from Revenue Support Grant and therefore should remain in the “local government funding pot”. 2022/23 is expected to be the last legacy payment, but annual allocations have also been awarded since 2020/21.
- 2022/23 Services Grant – was announced as one-off in 2022/23, however it contains funding to offset the increase in National Insurance contributions. Now that this increase has been reversed, it is less likely this grant will continue.

It is very difficult to predict whether the above grants will continue, and if so at what value. It is also difficult to envisage a reduction in funding in the current economic climate. The current sum of these four grants is £1,461k. Therefore a movement of +/- 10% would equate to £146k.

We await the Provisional Settlement in December and the Final Settlement in the following February for the definitive figures to use in our final budget calculations.

Interest – Investment Returns and Financing Costs

To combat inflation, the Bank of England's Monetary Policy Committee move interest rates to encourage/discourage spending. With inflation being at a 40-year high, interest rates have been increasing rapidly, starting at a historic low of 0.1% up to December 2021 to the current 2.25% (October 2022). Further movements are expected during the remainder of 2022 and into 2023.

On one hand this is good news as the Council will earn more interest on its temporary investments. Coupled with the recognition of additional interest on the loan to the GP Surgery, this is expected to add c£200k income. However, potentially offsetting this is lower lending to 3 Rivers Development Ltd (3 Rivers) following the change in PWLB lending criteria. Alternative sites are being sought so this may not come to fruition.

The largest impact of movements in interest rates will be on the cost of financing external (PWLB) debt. Given the increase in the Capital Programme in the last couple of years largely related to 3 Rivers developments and the objective to increase the housing stock for the HRA, substantial external borrowing will be required. Wherever possible, the continuation of internal borrowing will be undertaken. However there is insufficient capacity to meet the full demand of the full programme.

Forecasts for interest rate increases are difficult to predict as they will adjust to the current circumstances. If the increases curb spending quickly, it is expected that the rates will rise for the next couple of years and then fall back almost equally quickly. However, the rate of that reduction will depend on the depth of the recession.

At present, we are expecting PWLB rates will increase to broadly the below levels:

Term (Yrs)	Current Rate [#]	01/09/2023	01/09/2024	01/09/2025	01/09/2026	01/09/2027
5	5.08%	4.50%	4.50%	4.25%	4.00%	3.75%
10	5.28%	4.50%	4.50%	4.25%	4.00%	3.75%
25	5.55%	4.50%	4.75%	4.50%	4.25%	4.00%
50	5.50%	4.75%	5.00%	4.75%	4.00%	3.75%

[#] Note the current rate is expected to stabilise and reduce following the Chancellors "Medium Term Fiscal Plan"

A 0.25% movement in interest rates equates to £3,500 – £4,500 per annum¹ additional interest earned/cost for every £1m lent/borrowed.

Covid-19

The pandemic had a significant impact on the Council's finances. It continues to impact service income within Leisure and Car Parking due to lower patronage most likely arising from more people working from home and increased online shopping. At present, although we forecast some degree of recovery, it appears that the income will not recover to pre-Covid-19 levels without changes to the service offered or by increasing fees. Therefore, only a partial recovery is included for Car Parks and Leisure; still below 2019/20 levels.

Collection Fund

Similarly, the collection rate on Council Tax was recovering from the implications of Covid-19. In 2022/23 the collection rate was increased to 97.5%, and was forecast to increase again to 98% in 2023/24 and beyond. However, the cost of living crisis is now impacting on collection rates with the in-year forecast indicating collection might only be 96%. Therefore it could be prudent to reduce the forecast back to those applied during the pandemic; down from 97.5% to 96%. The associated financial implication is c£100k.

Covid-19 related Business Rates reductions were covered by Section 31 Grant and legislation on how it should be accounted for. Normally, the surplus/deficit on the Collection Fund is distributed to Preceptors during the following financial year. However, given the scale of the deficit, Government have legislated that it should be spread over 3 financial years. Therefore, the value cover the future two financial years is held in reserves and will be drawn down in the relevant year.

Collection rates have fallen less against Business Rates, with collection still close to 98%. However, it is still possible that a collection deficit will need to be included in 2023/24 with the Council picking up 40%, potentially up to £100k.

Housing Revenue Account

An assumption has been included for substantial growth in Housing over the MTFP timeframe. The exact timing of the delivery of these houses is subject to an acceptable business case and the availability of external funding.

¹ Depending on the initial interest rate

An assumption has been made for the external funding available from Homes England. Each extra 1% of grant funding that could be obtained reduces the borrowing requirement by approximately £125k per annum. Therefore it will be critical that the Council maximised this opportunity.

Risk

All of the assumptions made in the MTFP have been examined for risk and estimates of expenditure and income have been made on a prudent/most likely occurrence. This has been based on previous experience, evidence in the current financial year, consultation with specialist advisers and taking account of all known market factors at the time of finalising the plan.

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Appendix 2

The Table below gives an overall summary of the Council's General Fund MTFP position (which includes a wide range of assumptions).

MTFP General Fund Summary

2022/23 £'000		Notes	2023/24 £'000	2024/25 £'000	2025/26 £'000	2026/27 £'000	2027/28 £'000
14,785	Net Direct Cost of Services		16,074	16,418	17,080	17,672	18,096
(1,715)	Net recharge to HRA		(1,800)	(1,854)	(1,891)	(1,929)	(1,968)
687	Provision for Repayment of Borrowing	1	710	929	1,039	1,150	1,146
13,757	Net Service Costs		14,985	15,493	16,228	16,892	17,274
(993)	Net Interest Costs/(Receipts)	2	(1,005)	(838)	(1,058)	(1,218)	(1,218)
153	Finance Lease Interest Payable		170	200	126	116	106
(2,677)	Net Transfers to/(from) Earmarked Reserves	3	(286)	326	279	518	618
10,240	Total Budget Requirement		13,863	15,182	15,575	16,309	16,699
	Funded By:						
(1,855)	Retained Business Rates	4	(3,558)	(3,599)	(3,236)	(3,279)	(3,345)
(99)	Lower Tier Services Grant	5	(99)	(99)	0	0	0
(490)	Rural Services Delivery Grant		(490)	(490)	(490)	(490)	(490)
(719)	New Homes Bonus	5	(719)	(719)	0	0	0
(153)	2022/23 Services Grant	5	(153)	(153)	0	0	0
(6,925)	Council Tax–MDDC	6	(6,733)	(6,947)	(7,267)	(7,493)	(7,726)
(10,240)	Total Funding		(11,751)	(12,007)	(10,993)	(11,262)	(11,561)
0	Annual Gap – Increase/(Decrease) In-year		2,111	1,063	1,408	464	173
0	Cumulative Gap		2,111	3,175	4,582	5,046	5,219

Notes:

1. The Provision for repayment of borrowing incorporates the financial implications of the proposed Capital Programme shown in Appendix 4.
2. The reduction in Net Interest Costs/(Receipts) reflects a prudent assumption of the interest earned from 3 Rivers Developments Ltd. This will be updated once the latest Business Plan has been approved.
3. Net Transfers to/(from) Earmarked Reserves reflects planned contributions to, or drawdowns from reserves. The 2022/23 value includes the drawdown from the Business Rates Smoothing Reserves to offset the loss caused by Covid-19 reliefs being applied, where S31 Grant was received instead (see Note 4).
4. The Retained Business Rates income drops in 2025/26 to reflect the potential changes the Government might implement to the Business Rates Retention Scheme. These include Re-Baselining and Resource Equalisation.
5. Earlier this year the former Secretary of State announced at the Local Government Association annual conference that there would be a two-year settlement covering 2023/24 and 2024/25. This indicates it is highly likely to be another roll forward settlement. As such, the current assumption is for a cash freeze in 2023/24 and 2024/25.
6. Council Tax income is forecast assuming Band D charge increases in line with assumed referendum limits, and a prudent return to Pre-Covid-19 collection rates

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Mid Devon District Council - Budget options

Description	2023/24 £	2024/25 £	2025/26 £	2026/27 £	2027/28 £	TOTAL £
Annual Budget Shortfall - Feb Cabinet 2022	1,702,993	531,168	(61,345)	(8,230)	0	2,164,586
Revisions - Summer 2022	408,457	532,249	1,468,935	472,008	172,863	3,054,512
Revised Annual Budget Shortfall	2,111,450	1,063,417	1,407,590	463,778	172,863	5,219,098
Cumulative Budget Shortfall	2,111,450	3,174,867	4,582,457	5,046,235	5,219,098	

Service Specific Options to reduce Budget Shortfall

Description	PDG committee	2023/24 £	2024/25 £	2025/26 £	2026/27 £	2027/28 £	TOTAL £	Notes
Restructure of Corporate Management	Cabinet	??	??	??	??	??	0	Reduced Management Capacity, less of a voice in the community
Grounds Maintenance - reduced service delivery / seek contributions from Town/Parish Councils	Environment	??	??	??	??	??	0	Reduced Aesthetics, possible reduced asset life
Review of Fees and Charges	Cabinet	??	??	??	??	??	0	All sources of income are being reviewed to ensure full cost recovery
ICT - Not filling current vacancy	Cabinet	??	??	??	??	??	0	Reduced support to organisation, Security risks / Less efficiency
Open Spaces - reduced service delivery / seek contributions from Town/Parish Councils	Environment	??	??	??	??	??	0	Reduced Aesthetics, possible reduced asset life
Leisure Services - review modus operandi, alternative sporting options, options to increase membership	Community	??	??	??	??	??	0	Very competitive market, might require further investment
Financial Services - reduced audit days	Cabinet	??	??	??	??	??	0	Reduced legal oversight of council's work with potential for increase in exposure to fraud and inefficient procedures
Revenues and Benefits - increased recovery of costs through Penalties and Court Fees	Cabinet	??	??	??	??	??	0	Dependent upon level of enforcement action, difficult to collect
Property Services - Pair back maintenance, Increase commercial rents (Fore St & Market Walk), further subletting of Phoenix House, achievement by grant funding opportunities	Environment	??	??	??	??	??	0	Can maintenance of our assets be paired back, or our contributions to sinking fund be reduced without material long term implications? All income to be reviewed. Need to identify potential future partners to operate from Phoenix House
Customer Services - increased self-sufficiency, reduced printing/postage	Community	??	??	??	??	??	0	Responsive service - need to actively promote ways public can seek information from the Council
Human Resources - reduced investment in systems	Cabinet	??	??	??	??	??	0	Option to upgrade and improve current system
Legal Services - reduce spend on external advice	Cabinet	??	??	??	??	??	0	Reduced legal oversight of council's work with potential for increase in successful litigation against the council
Service Budget Options Sub-total		0	0	0	0	0	0	

Generic Budget Options to reduce Budget Shortfall

Description	PDG committee	2023/24 £	2024/25 £	2025/26 £	2026/27 £	2027/28 £	TOTAL £	Notes
Business Rates and Council Tax Growth and Collection Surplus / Deficit	Cabinet	??	??	??	??	??	0	Prudent assumption to include limited growth and not include any collection surplus in 2023/24 and 2024/25
Energy Savings arising from Salix Funding	Environment	??	??	??	??	??	0	Energy savings to be calculated once new heating systems are installed
Review of HRA Recharges	Homes	??	??	??	??	??	0	All recharges are reviewed to ensure they are appropriate
Reduce Corporate Subscriptions / Fees	Cabinet	??	??	??	??	??	0	Can any subscriptions be dropped or reduced?
Commercialise Services	Cabinet	??	??	??	??	??	0	How can we commercialise more services?
Review of Interest receivable	Cabinet	??	??	??	??	??	0	Post approval of 3Rivers Business Plan
Review of reserves	Cabinet	??	??	??	??	??	0	Review minimum balances and earmarked reserves still appropriate
Partnership Working	Cabinet	??	??	??	??	??	0	Should services proactively seek the formation of partnerships??
Generic Budget Options Sub-total		0	0	0	0	0	0	
TARGET		(1,000,000)	(1,000,000)					
Potential Cumulative MTFP Position		1,111,450	63,417	1,407,590	463,778	172,863	3,219,098	

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Sub Area	Project Title	Total Project Costs for Approval						Spend Profile						Notes	
		2023/24	2024/25	2025/26	2026/27	2027/28	Total	2023/24	2024/25	2025/26	2026/27	2027/28	Total		
		£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's		
GENERAL FUND															
Exe Valley Leisure Centre	Spin bikes	32	-	-	-	-	32	32	-	-	-	-	-	32	In addition to 2022/23 approved budget of £120k on CA462
Lords Meadow Leisure Centre	Fitness Studio renewal of equipment	125	-	-	-	-	125	125	-	-	-	-	-	125	
Lords Meadow Leisure Centre	Reception infrastructure	40	-	-	-	-	40	40	-	-	-	-	-	40	
Lords Meadow Leisure Centre	Spin bikes including environment improvements	32	-	-	-	-	32	32	-	-	-	-	-	32	
Culm Valley Sports Centre	Spin Bikes	40	-	-	-	-	40	40	-	-	-	-	-	40	
Leisure - Other	All leisure sites replacement management/site access system (Hardware Element)	200	-	-	-	-	200	200	-	-	-	-	-	200	
Leisure - Climate Change/Net Zero	CVSC -Phase 3B Salix funding energy saving	400	-	-	-	-	400	400	-	-	-	-	-	400	In addition to 2022/23 approved budget of £50k on CA487
Phoenix House	Etarmis - Security Swipe - (linked to security project)	30	-	-	-	-	30	30	-	-	-	-	-	30	
Phoenix House	Building Mgmt System for Heating Control	100	-	-	-	-	100	50	50	-	-	-	-	100	
MDDC Shops/Industrial Units	36 & 38 Fore Street including Flat above structure & cosmetic works	100	-	-	-	-	100	50	50	-	-	-	-	100	In addition to 2022/23 approved budget of £197k on CA574
HIF Schemes	CA719 Cullompton Town Centre Relief Road (HIF)	18,030	-	-	-	-	18,030	1,489	15,041	1,500	-	-	-	18,030	In addition to 2022/23 approved budget of £12,052k on CA719
Private Sector Housing	Empty Home Purchase Project	700	700	700	-	-	2,100	700	700	700	-	-	-	2,100	
Private Sector Housing	DFG and other private sector grants	525	550	575	600	625	2,875	525	550	575	600	625	2,875		
ICT Projects	Server hardware/software Citrix Replacement	50	-	-	-	60	110	50	-	-	-	-	60	110	
ICT Projects	VM/Storage Area Network	120	-	-	-	140	260	120	-	-	-	-	140	260	
ICT Projects	UPS Replacements	20	-	25	-	30	75	20	-	25	-	-	30	75	
ICT Projects	Laptop/Desktop Refresh	150	150	160	160	170	790	150	150	160	160	170	790		
ICT Projects	Audio/Video replacement for Phoenix House	120	-	-	-	140	260	120	-	-	-	-	140	260	
Exe Valley Leisure Centre	ATP replacement (50% share with DCC)	-	220	-	-	-	220	-	220	-	-	-	-	220	
Exe Valley Leisure Centre	CHP -Replacement future energy saving project	-	30	-	-	-	30	-	30	-	-	-	-	30	
Culm Valley Sports Centre	ATP replacement (50% share with DCC)	-	210	-	-	-	210	-	210	-	-	-	-	210	
Culm Valley Sports Centre	Fitness Studio renewal of equipment	-	150	-	-	-	150	-	150	-	-	-	-	150	
Other - Climate Change/Net Zero	All Fleet - Vehicle live monitoring for CO2 emissions	-	115	-	-	-	115	-	115	-	-	-	-	115	
Other - Climate Change/Net Zero	Phoenix House - Air Source Heat pumps & ducting	-	450	-	-	-	450	-	450	-	-	-	-	450	
Other - Climate Change/Net Zero	MSCP -Solar carport and additional security	-	170	-	-	-	170	-	170	-	-	-	-	170	
Other - Climate Change/Net Zero	MSCP Additional electric car charging points	-	80	-	-	-	80	-	80	-	-	-	-	80	
MDDC Depots	Depot Build - Waste & Recycling	-	3,500	-	-	-	3,500	-	3,500	-	-	-	-	3,500	
Public Conveniences	Phoenix Lane Toilets - new construction in fresh position - funding options to be pursued	-	125	-	-	-	125	-	50	75	-	-	-	125	Potential joint project with Parish Council - Undertaking this project is dependent on external funding Options for this asset are being considered - this facility is currently closed. Funding options to be persued
Public Conveniences	Westexx Rec Toilets - Replacement	-	160	-	-	-	160	-	50	110	-	-	-	160	
Other Projects	Tiverton Market Paving - Permanent Solution	-	200	-	-	-	200	-	200	-	-	-	-	200	
Other Projects	Baler	-	480	-	-	-	480	-	480	-	-	-	-	480	
Other Projects	PDA's for cabs	-	-	-	-	-	-	-	150	-	-	-	-	150	
Leisure - Climate Change/Net Zero	EVLC - Building Fabric - Insulation improvements	-	-	260	-	-	260	-	-	260	-	-	-	260	
Phoenix House	Cooling options Air Handling Unit	-	-	150	-	-	150	-	-	150	-	-	-	150	
Lords Meadow Leisure Centre	ATP replacement (no dual use)	-	-	-	200	-	200	-	-	-	200	-	-	200	
Leisure - Climate Change/Net Zero	LMLC -Building Fabric -Insulation improvements	-	-	-	200	-	200	-	-	-	200	-	-	200	
Leisure - Climate Change/Net Zero	CVSC-Building Fabric -Insulation improvements	-	-	-	200	-	200	-	-	-	200	-	-	200	
Other - Climate Change/Net Zero	MDDC commercial property building fabric	-	-	-	240	-	240	-	-	-	240	-	-	240	
		20,814	7,290	1,870	1,600	1,165	32,739	4,173	22,396	3,555	1,600	1,165	32,889		

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Sub Area	Project Title	Total Project Costs for Approval						Spend Profile						Notes
		2023/24	2024/25	2025/26	2026/27	2027/28	Total	2023/24	2024/25	2025/26	2026/27	2027/28	Total	
		£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	£000's	
HOUSING REVENUE ACCOUNT														
Other General Fund Development Projects	Regeneration Project 1	-	-	-	-	-	-	-	-	-	-	-	-	
Other General Fund Development Projects	GF 'InFill' Projects	-	-	-	-	-	-	-	-	-	-	-	-	
Existing Housing Stock	Garage Modifications	150	150	150	150		600	150	150	150	150		600	
Existing Housing Stock	Roofing	600	600	600	600	600	3,000	600	600	600	600	600	3,000	
Existing Housing Stock	Decent Homes	860	905	730	755	780	4,030	860	905	730	755	780	4,030	
Existing Housing Stock	Fire Safety	50	40	30	20	20	160	50	40	30	20	20	160	
Existing Housing Stock	Window/Doors	400	400	400	400	400	2,000	400	400	400	400	400	2,000	
Existing Housing Stock	Heating	375	380	385	390	395	1,925	375	380	385	390	395	1,925	
Existing Housing Stock	Renewables	250	250	250	250	250	1,250	250	250	250	250	250	1,250	
Existing Housing Stock	Adaptations	305	310	315	320	325	1,575	305	310	315	320	325	1,575	
Housing Schemes (1:4:1 Projects)	Project 4	189	-	-	-	-	189	189	-	-	-	-	189	In addition to 2022/23 approved budget of £21k on CA161
Housing Schemes (1:4:1 Projects)	Project 1	10	-	-	-	-	10	10	-	-	-	-	10	In addition to 2022/23 approved budget of £35k on CA158
Housing Schemes (1:4:1 Projects)	Project 3	1,387	-	-	-	-	1,387	1,387	-	-	-	-	1,387	In addition to 2022/23 approved budget of £113k on CA160
Housing Schemes (1:4:1 Projects)	Project 7	220	-	-	-	-	220	220	-	-	-	-	220	
Housing Schemes (1:4:1 Projects)	Project 41	140	-	-	-	-	140	140	-	-	-	-	140	
Housing Schemes (1:4:1 Projects)	Project 29	950	-	-	-	-	950	-	950	-	-	-	950	In addition to 2022/23 approved budget of £150k on CA174
Housing Schemes (1:4:1 Projects)	Project 28	1,100	-	-	-	-	1,100	110	990	-	-	-	1,100	
Housing Schemes (1:4:1 Projects)	Project 51	400	-	-	-	-	400	40	360	-	-	-	400	
Housing Schemes (1:4:1 Projects)	Project 52	220	-	-	-	-	220	22	198	-	-	-	220	
Housing Schemes (1:4:1 Projects)	Project 53	230	-	-	-	-	230	23	207	-	-	-	230	
Housing Schemes (1:4:1 Projects)	Project 5	220	-	-	-	-	220	22	198	-	-	-	220	
Housing Development Schemes (HE)	Project 15	4,210	-	-	-	-	4,210	4,210	-	-	-	-	4,210	In addition to 2022/23 approved budget of £690k on CA171
Housing Development Schemes (HE)	Project 18	200	-	-	-	-	200	200	-	-	-	-	200	In addition to 2022/23 approved budget of £900k on CA166
Housing Development Schemes (HE)	Project 10	1,505	-	-	-	-	1,505	1,505	-	-	-	-	1,505	In addition to 2022/23 approved budget of £195k on CA170
Housing Development Schemes (HE)	Project 14	200	-	-	-	-	200	200	-	-	-	-	200	In addition to 2022/23 approved budget of £800k on CA164
Housing Development Schemes (HE)	Project 9	1,105	-	-	-	-	1,105	1,105	-	-	-	-	1,105	In addition to 2022/23 approved budget of £195k on CA169
Housing Development Schemes (HE)	Project 11	400	-	-	-	-	400	400	-	-	-	-	400	In addition to 2022/23 approved budget of £1,500k on CA163
Housing Development Schemes (HE)	Project 25	2,600	-	-	-	-	2,600	260	2,340	-	-	-	2,600	
Housing Development Schemes (HE)	Project 8	2,240	-	-	-	-	2,240	-	2,240	-	-	-	2,240	In addition to 2022/23 approved budget of £360k on CA162
Housing Development Schemes (HE)	Project 37	1,800	-	-	-	-	1,800	180	1,620	-	-	-	1,800	
Housing Development Schemes (HE)	Project 33	1,300	-	-	-	-	1,300	130	1,170	-	-	-	1,300	
Housing Development Schemes (HE)	Project 36	1,700	-	-	-	-	1,700	170	1,530	-	-	-	1,700	
Housing Development Schemes (HE)	Project 20	24,940	-	-	-	-	24,940	700	8,080	8,080	8,080	-	24,940	
Other HRA Projects	Post Hill, Tiverton	11,583	-	-	-	-	11,583	-	5,000	6,583	-	-	11,583	In addition to 2022/23 approved budget of £5,417k on CA152
Housing Schemes (1:4:1 Projects)	Project 27	-	1,700	-	-	-	1,700	-	170	1,530	-	-	1,700	
Housing Development Schemes (HE)	Project 26	-	1,200	-	-	-	1,200	-	120	1,080	-	-	1,200	
Housing Development Schemes (HE)	Project 22	-	2,800	-	-	-	2,800	-	280	2,520	-	-	2,800	
Housing Development Schemes (HE)	Project 54	-	200	-	-	-	200	-	20	180	-	-	200	
Housing Development Schemes (HE)	Project 55	-	200	-	-	-	200	-	20	180	-	-	200	
Housing Schemes (1:4:1 Projects)	Project 16	-	-	1,000	-	-	1,000	-	-	100	900	-	1,000	Although originally identified in 2022/23 Capital Programme, the Housing Delivery Programme has been reviewed with stakeholders. Considering feasibility studies and available funding, it has been decided to flag this project in its entirety in this MTFP.
Housing Schemes (1:4:1 Projects)	Project 56	-	-	200	-	-	200	-	-	20	180	-	200	
Housing Schemes (1:4:1 Projects)	Project 57	-	-	200	-	-	200	-	-	20	180	-	200	
Housing Schemes (1:4:1 Projects)	Project 30	-	-	1,100	-	-	1,100	-	-	110	990	-	1,100	Although originally identified in 2022/23 Capital Programme, the Housing Delivery Programme has been reviewed with stakeholders. Considering feasibility studies and available funding, it has been decided to flag this project in its entirety in this MTFP.
Housing Development Schemes (HE)	Project 23	-	-	4,100	-	-	4,100	-	-	410	3,690	-	4,100	
Housing Development Schemes (HE)	Project 24	-	-	1,100	-	-	1,100	-	-	110	990	-	1,100	
Housing Development Schemes (HE)	Project 12	-	-	1,600	-	-	1,600	-	-	160	1,440	-	1,600	Although originally identified in 2022/23 Capital Programme, the Housing Delivery Programme has been reviewed with stakeholders. Considering feasibility studies and available funding, it has been decided to flag this project in its entirety in this MTFP.
Housing Development Schemes (HE)	Project 35	-	-	1,700	-	-	1,700	-	-	170	1,530	-	1,700	
Housing Development Schemes (HE)	Project 31	-	-	1,100	-	-	1,100	-	-	110	990	-	1,100	
Housing Development Schemes (HE)	Project 13	-	-	1,100	-	-	1,100	-	-	110	990	-	1,100	Although originally identified in 2022/23 Capital Programme, the Housing Delivery Programme has been reviewed with stakeholders. Considering feasibility studies and available funding, it has been decided to flag this project in its entirety in this MTFP.
Housing Schemes (1:4:1 Projects)	Project 58	-	-	-	200	-	200	-	-	-	20	180	200	
		61,839	9,135	16,060	3,085	2,770	92,889	14,213	28,528	24,333	22,865	2,950	92,889	
		82,653	16,425	17,930	4,685	3,935	125,628	18,386	50,924	27,888	24,465	4,115	125,778	

MID DEVON DISTRICT COUNCIL
HRA MEDIUM TERM FINANCIAL PLAN 2023-24 TO 2027-28

Current Base		2023-24	2024-25	2025-26	2026-27	2027-28
2022-23		£	£	£	£	£
£						
	Employee costs					
	Cost pressures - New posts + Recruitment/Retention funding/ Pay Award	340,440			50,000	-
-	Savings	-	-	-	-	-
3,183,419	Base salary budget	3,342,590	3,793,520	3,869,390	3,946,780	4,076,715
140,321	Other Employee costs	144,530	148,870	151,850	154,890	157,990
3,323,740	<i>Inflation base</i>	3,827,560	3,942,390	4,021,240	4,151,670	4,234,705
3,323,740	Total in year cost	3,827,560	3,942,390	4,021,240	4,151,670	4,234,705
	Premises costs					
267,900	Base budget	275,940	326,650	346,750	367,450	388,770
	Utilities	41,200	10,000	10,000	10,000	10,000
-	Savings	-	-	-	-	-
267,900	<i>Inflation base</i>	317,140	336,650	356,750	377,450	398,770
267,900	Total in year cost	317,140	336,650	356,750	377,450	398,770
	Transport related costs					
240,040	Base budget	247,240	281,230	295,290	310,050	325,550
	Fuel increases	20,000				
240,040	<i>Inflation base</i>	267,240	281,230	295,290	310,050	325,550
240,040	Total in year cost	267,240	281,230	295,290	310,050	325,550
	Supplies and services					
-	Cost pressures	-	-	-	-	-
2,176,030	Base budget	2,284,831	2,399,073	2,519,026	2,644,977	2,777,226
2,176,030	<i>Inflation base</i>	2,284,831	2,399,073	2,519,026	2,644,977	2,777,226
	One off initiatives					
2,176,030	Total in year cost	2,284,831	2,399,073	2,519,026	2,644,977	2,777,226
1,714,560	Support services	1,800,288	1,854,297	1,891,383	1,929,210	1,967,794
7,722,270	Total gross expenditure	8,497,059	8,813,639	9,083,689	9,413,358	9,704,045
	Rents , fees, charges and Other Income					
(12,708,660)	Housing Rents	(13,344,090)	(13,776,960)	(14,220,780)	(15,049,990)	(15,814,430)
-	Income increases - Growth in units	(99,330)	(234,740)	(605,268)	(526,930)	(548,860)
-	Income Reductions-Units lost through Right-to-Buy	67,730	69,760	71,155	72,578	74,030
(367,520)	Garage and Garage Ground Rent income	(367,520)	(367,520)	(367,520)	(367,520)	(367,520)
(380,160)	Other Income	(321,160)	(516,360)	(551,800)	(537,968)	(524,828)
(13,456,340)	<i>Inflation base</i>	(14,064,370)	(14,825,820)	(15,674,213)	(16,409,830)	(17,181,608)
	One off initiatives					
(13,456,340)	Total in year cost	(14,064,370)	(14,825,820)	(15,674,213)	(16,409,830)	(17,181,608)
(5,734,071)	NET COST OF SERVICES	(5,567,311)	(6,012,181)	(6,590,524)	(6,996,472)	(7,477,562)
980,801	Capital Financing	1,010,127	1,191,087	1,338,047	1,747,655	2,150,875
925,100	Interest Payable (PWLb)	1,177,730	1,854,800	2,573,160	3,092,130	3,255,645
41,950	Interest Payable HRA to GF	39,654	37,294	34,869	32,377	29,816
9,500	Interest Payable (finance leases)	9,500	9,500	9,500	9,500	9,500
2,465,000	Contribution to Capital - MRA	2,435,000	2,475,000	2,295,000	2,315,000	2,195,000
105,000	Renewable energy surplus	102,900	100,840	98,820	96,840	94,900
149,133	Affordable Rent surplus	149,133	149,133	149,133	149,133	149,133
803,282	Principal adjustment	854,210	906,646	960,635	1,016,223	1,073,458
-	Utilisation of the 30 Year Maintenance Programme	-	-	-	-	-
189,440	External Funding to/(from) Decarbonisation Scheme	-	-	-	-	-
50,000	Transfers to sinking funds	50,000	50,000	50,000	50,000	50,000
14,865	Transfer to Housing Maintenance Fund (HMF)	-	-	-	-	-
5,734,071	Indirect costs/reserve transfers	5,828,254	6,774,299	7,509,163	8,508,857	9,008,327
0	Annual (Surplus) / Savings to be found	260,943	762,118	918,639	1,512,385	1,530,764
0	Cumulative (Surplus) / Savings to be found	260,943	1,023,061	1,941,700	3,454,085	4,984,849

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Cabinet Report 1st November 2022

Pre-app fees and discretionary Development Management charges

Cabinet Member(s) Cllr R Chesterton, Cabinet Member for Planning and Economic Regeneration.

Responsible Officer Richard Marsh, Director of Place

Reason for the Report: To advise Members of the proposal to increase the fees associated with our current pre-application service in addition to introducing a range of new charges relating to discretionary services currently provided by the Planning department. As pressure on the Council's budget continue to increase, the introduction of these charges will assist this key service area to maintain the level of service provided to our customers whilst managing the cost to the Council of providing these services. It will also bring Mid Devon more in to line with similar district councils within the wider Devon and South West geography.

RECOMMENDATION:

- **That the proposed fees and charges set out in Appendix 1 of this report be introduced from 15 November 2022**
- **That the duty planning service be removed from 15 November 2022.**
- **That future increases to discretionary fee charges to be delegated to the the Director of Place in conjunction with the Cabinet Member for Planning and Economic regeneration**

Relationship to Corporate Plan: The gathering of these fees will ensure the Council can to continue to provide a quality service for our customers and allow us to realise broad Corporate Plan ambitions by supporting good quality development within the district. Our customers will be able to receive clear, helpful advice, that should lead to better quality development and less negotiation at the planning application stage – thereby making the process more time and cost effective.

Financial Implications: The income generated by the proposed fees will contribute towards the 'self-sufficiency' target for Development Management. The fees proposed see an increase which will bring Mid Devon in line with other regional Local Planning Authorities and will assist the department in sustaining a budget for the services which we are obligated to provide. The proposed fee levels are based on an assessment of the time, on average, that it will take planning, and support officers to provide the services to be offered and an hourly rate for the officers providing the service. Please note that such charges have been calculated on the 22/23 pay rates (including pay rises) and may be subject to change in the next financial year as rates increase.

Legal Implications: Statutory planning fees in England are set nationally by the government and are detailed in the Town and Country Planning (Fees for Applications, Deemed Applications, Requests and Site Visits) (England) Regulations 2012, as amended. Such application fees cannot be amended. However, Section 93 of the Local Government Act 2003 sets out that Local Planning Authorities have the right to set discretionary fees that they provide as a service to the public, provided

they do not make a profit. The proposals within this report are therefore appropriate in the legal context in which we operate.

Risk Assessment: The new charges and the removal of the planning duty service could see some individuals go straight to apply for planning permission as opposed to utilising the pre-app service. However, in such a circumstance, depending on the size and scale of development proposed, this may trigger the new discretionary fee for validation of applications (explained later in the report). The new fees and charges proposed have been calculated by undertaking an assessment on how long an officer would normally take to complete the task. This has then been multiplied against the Officers hourly rate as set out by the Council. As noted above, this may change in future due to rises in costs and wages as a result of inflation.

Equality Impact Assessment: No equality issues arise directly from this report upon people / groups with protected characteristics.

Impact on Climate Change: The Local Plan makes provision for sustainable development within the district up to 2033, as well as providing policies for the protection and enhancement of the natural and built environments. A more robust pre-application service will see better developments coming forward which will contribute the sustainability of our environment.

No climate change issues arise directly from this report.

1. INTRODUCTION

- 1.1 It is proposed to introduce a range of new charges relating to discretionary services currently provided by the Planning (Development Management) services. As pressure on the Council's budget continues to increase the introduction of these charges will assist this key, statutory service area to maintain the level and quality of service provided to our customers

2. EXISTING FEES

- 2.1.1 Mid Devon District Council Planning (development management) service is, in part, funded by the fees received from the submission of planning applications. Such fees are statutory are set nationally by Government and the Council currently has no control over the level of these fees.
- 2.1.2 It is widely acknowledged that for the majority of local planning authorities the current level of planning application fees do not cover the full costs to Councils planning services they provide.
- 2.3 Government continues to introduce changes to planning legislation which create more and more changes to the planning system and make the system increasingly complex. This is somewhat at odds with the focus of government policy, which has had a stated aim of seeking to streamline the planning process. Some of these implemented policy changes bring with them a change to how planning fees would normally be obtained. For example, the introduction of more permitted development rights can allow for a developer to

pay a much smaller statutory fee than that which they would if applying for full planning permission. An example would be the ability for a developer to obtain an additional storey on a house through prior approval (permitted development) as opposed to asking for full planning permission.

- 2.4 Whilst planning application fees represent the majority of fee income received by the planning service, some additional discretionary fees income is also received. This includes charges relating to our current service of pre-application advice, the current planning duty service and microfiche retrieval. Such fees have not been reviewed since 2020, since which we have seen a rise in in general inflation. The current pre-application fees do not currently reflect the amount of hours that officers spend on this type of work, nor do they reflect the fees that are reasonably being charged in other regional local planning authorities to reflect the time and cost associated with such services and requests. A benchmarking exercise of this data has therefore been undertaken together with a series of calculations relating to hourly rate of an officer multiplied by the hours of which an exercise would take to complete and this has been used to inform a proposed revised charging schedule for Mid Devon (the subject of this paper)

3 PROPOSED DISCRETIONARY CHARGES

- 3.1.1 The pre-application process is considered to be an important part of the overall planning service. The National Planning Policy Framework advises:

Early engagement has significant potential to improve the efficiency and effectiveness of the planning application system for all parties. Good quality pre-application discussion enables better coordination between public and private resources and improved outcomes for the community.

- 3.1.2 Notwithstanding the acknowledged importance of pre-application advice, the provision of such advice is discretionary and to ensure that the Council can provide high quality pre-application advice it is important to ensure that the Planning service has the appropriate level of resource available. The fees charged to applicants for the submission of a planning application do not include provision for providing pre-application application advice.

- 3.1.3 A new set of pre-application fees are therefore proposed together with the introduction of new fees which seeks to recognise work that the officers have been undertaking for some time without an associated fee. The new fees will see a significant uplift on the current fees charged which are also considered to help sustain the budget pressure felt across the planning department as there are with other services across the Council.

- 3.1.4 The proposed pre-application fee charges together with the associated percentage increase on the existing fee can be seen in Appendix 1. Where a new fee has been introduced, this is simply entitled 'new fee' and captures a fee for work that has always been undertaken by the officers but not charged for to date. Furthermore, it has been considered necessary to update the

descriptions upon which pre-application advice is being sought for to make it clearer and more helpful for those applying.

- 3.1.5 In order to demonstrate the effect of adopting these new charges, there are a few worked examples below. These seek to demonstrate the income associated with the current charges, and a comparison done for the same work if charged under the proposed fees.

3.1.6 Forecast examples

Type of pre-application	Costs obtained via existing fee	Proposed fee
Replacement dwelling	£180	£355
Erection of 50 units	£780	£5900 or bespoke fee
Erection of 150 units	£1200	£10,650 or bespoke fee

A total of 162 pre-applications were submitted last year, with a total cost of £32,801 being received. Given this is based on the existing charges, it is forecasted that there will be a significant increase in income for the planning service which in turn will help sustain resource and support the Council financially overall.

- 3.1.7 Other proposed discretionary fee charges that are also noted under Appendix 1 include:

- Validation of applications – ‘fast track’.
This is a proposed new service whereby the checking of an application prior to submission is offered for 10% of the statutory application fee. The benefit of doing this ensures that the team check the documentation prior to submission ensuring that applications are made valid upon official submission. Housebuilders and those with a time constraint would likely use this service.
- Validation of applications that are not correct the second time around.
The team spend an enormous amount of time going back and forth with applicants and agents to ensure their submission is valid before it can be registered. This is despite the Council having guidance on what supporting information must be submitted with an application to enable it to be valid. As such, the fee charge proposed is set to encourage agents/applicants to ‘get their application right’ the first time around, otherwise they are subject to a fee of 10% of the statutory application fee that they are applying for.
- Validation fee for retrospective planning applications.
A fee of 10% would be sought of the overall application fee for any retrospective application. This would seek to discourage individuals from submitting retrospective applications.

- **Printing of scanned applications**
Requests for printing an application will be charged on a sheet by sheet basis at 50 pence. This seeks to claim back the monies the Council spend on printing as well as the officer time taken to undertake the work.
- **Retrievals of microfiche records**
This request is frequent and is currently charged at £25. The proposed new charge to reflect officer time is £150.00. This is again based on the hourly rate for a support officer multiplied by the hours to undertake the work.
- **Appeals and the LPA's right to go for costs on more applications.**
We do not exercise this right enough – following an appeal against the LPA we should be applying for costs against the applicant where the LPA considers its position to be favourable. This would happen in circumstances where the LPA is confident in its position on refusing a development as it may be directly contrary to planning policy and the applicant chooses not to follow planning officer advice.
- **Planning Performance Agreements (PPA's)**
On average, it is expected that applications can be dealt with within the 8, 13 or 16 week statutory period, but for some applications a bespoke timetable is appropriate. The timetable for dealing with development applications can be extended beyond the statutory period so long as the council and the applicant agree. Provided the council is then able to meet the new mutually agreed date, an application will be counted as satisfying the timeliness requirement for development applications. The LPA can use PPAs more widely to assist with resourcing the department as appropriate to deal with applications whereby a PPA would be useful and helpful to both parties. This is a matter we have already begun implementing.
- **The introduction of an 18% uplift charge for administration work**
This would be a fee that we would charge an applicant when applying for planning permission which required further administration work than that normally required as part of the process. An example of this would be when the LPA are required to seek an Independent Viability Assessor to assess a viability assessment submitted by the applicant. Due to the rules around procurement, would have to first pay the associated fee before claiming back through the applicant.

4.0 The removal of the duty planning service

- 4.0.1 The planning service currently operates a duty planning service twice a week on a Tuesday morning and Thursday afternoon. This currently allows for members of the public or agents to book an appointment with a planning officer for a small fee (£36) whereby they can ask any question relating to development. This is usually responded to by an officer by means of phone call or a written response by email. There are many examples however whereby follow ups are requested under the same fee. Such appointments are meant to only take up to half an hour of officer time, but this is very rare

and officers usually spend up to an hour to respond to a query due to the detail required.

- 4.0.2 Whilst a duty planning service was typically adopted by most Local Planning Authorities some time ago, Mid Devon is now one of the only Local Planning Authorities across the region to still offer this service.
- 4.0.3 The proposed pre-application fee charges encompass a detailed breakdown of proposed developments with an appropriate fee charged to cover the length of time this would normally take an officer to complete. The fee list is also broken down into more detail which advises how the response will be received including whether a meeting will be given or just a written response or both. The revised fee schedule therefore is a much more accurate means of dealing with the type of enquires officers can receive under the duty planning service, and enables for a much more accurate and appropriate fee to be charged.
- 4.0.4 It is therefore recommended to members as part of the adoption of the new discretionary fees that the duty service be removed in its entirety, with officers then able to spend more of their valuable time comprehensively answering pre-application enquires in accordance with the proposed new fees.

5. CONCLUSION

- 5.1 The adoption of the proposed increase in pre-application advice and discretionary charges will assist the planning service to maintain the level and quality of service provided to customers whilst reducing the cost to the Council of providing these statutory services.
- 5.2 It is possible that the introduction of charges will reduce the number of pre-application enquiries received, but this will help reduce pressure on the service and improve capacity and resilience.

Contact for more Information:

Angharad Williams, Development Management Manager

Tel: 01884 255255 Email: awilliams@middevon.gov.uk

File Reference: None

Circulation of the Report: Cllr Richard Chesterton, Cabinet and Leadership Team.

Appendix 1 – Pre App Discretionary Fee Charges = 15/11/2022 – 31/03/2022

Pre-App Fee Description	New Fee	% Increase Per Fee	
House Holder Desktop no meeting no site visit	£230.00	140%	
House Holder One meeting no site visit	£400.00	833%	
Listed Building advice where the works do not require planning permission	£230.00	100%	New Fee
Listed Building site visit (where agreed)	£355.00	100%	New Fee
House Holder/Listed Building site visit	£650.00	100%	New Fee
Small Minor	£355.00	97%	
Residential – 1 dwelling Desk top evaluation with one meeting	£355.00	97%	
Residential – 1 dwelling Desk top evaluation no meeting	£230.00	100%	New Fee
Non-residential – Less than 200 sq m floorspace	£290.00	142%	
Change of use with no works	£230.00	100%	New Fee
Medium Minor	£830.00	131%	
Residential – 2 – 4 dwellings	£930.00	158%	
Non-residential – 200 – 499 sq m floorspace	£830.00	131%	
Site area less than 0.5 Ha (where no. of dwellings or floorspace is unknown)	£410.00	100%	New Fee
Large Minor Desk top Evaluation & one meeting & 1 Written Response	£1,780.00	100%	New Fee
Residential – 4 – 9 dwellings	£1,780.00	100%	New Fee
Non-residential – 500 – 999 sq m floorspace	£1,780.00	100%	New Fee
Site area 0.5 to 0.99 Ha (where no. of dwellings or floorspace is unknown)	£590.00	100%	New Fee
Small Scale Major Desktop Evaluation & one meeting & one written response	£2,960.00	517%	Or Bespoke Fee (PPA)
Residential – 10 - 30 dwellings	£2,960.00	521%	Or Bespoke Fee (PPA)
Non-residential 1,000 – 4,999 sq m floorspace	£2,960.00	521%	Or Bespoke Fee (PPA)
Site area - 1 – 1.99 Ha (where no. of dwellings or floorspace is unknown)	£650.00	35%	Or Bespoke Fee (PPA)
Medium Scale Major Desk Top Evaluation & 2 meetings & two written response	£5,900.00	656%	Or Bespoke Fee (PPA)
Residential - 31-149 dwellings	£5,900.00	656%	Or Bespoke Fee (PPA)
Non-residential 5,000 – 9,999 sq m floorspace	£5,900.00	656%	Or Bespoke Fee (PPA)
Site area - 2 – 3.99 Ha (where no. of dwellings or floorspace is unknown)	£1,780.00	128%	Or Bespoke Fee (PPA)
Large Scale Major Desktop Evaluation up to 3 meetings and written Response	£10,650.00	788%	Or Bespoke Fee (PPA)
Residential – more than 150 dwellings	£10,650.00	788%	Or Bespoke Fee (PPA)
Non-residential – over 10,000 sq m floorspace	£10,650.00	788%	Or Bespoke Fee (PPA)
Site area more than 4 Ha (where no. of dwellings or floorspace is unknown)	£2,370.00	98%	Or Bespoke Fee (PPA)
Anaerobic Digesters	£3,555.00	196%	Or Bespoke Fee (PPA)
Solar pv	£2,960.00	147%	Or Bespoke Fee (PPA)
Wind turbines	£2,960.00	147%	Or Bespoke Fee (PPA)
Written confirmation that an enforcement notice has been complied with	£230.00	92%	
Lawful development certificate	£230.00	283%	
Affordable housing scheme 100%	50% of the relevant fee		
Validation of applications 'Fast Track'	10% of Statutory Fee applied for	New Fee	New Fee
Validation of applications that are incorrect second time around	10% of Statutory Fee applied for	New Fee	New Fee
Validation of retrospective applications	10% of Statutory Fee applied for	New Fee	New Fee
Printing of scanned applications	£0.50 per sheet (assumed A4).	New Fee	New Fee
Retrievals of microfiche records	£150.00	600.00%	

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CABINET
1 NOVEMBER 2022

REPORT OF THE DIRECTOR OF PLACE

CREDITON TOWN CENTRE MASTERPLAN COMMISSIONING

Cabinet Member(s): Councillor Richard Chesterton, Cabinet Member for Planning and Regeneration

Responsible Officer: Richard Marsh, Director of Place

Reason for Report:

1. To seek members approval for commissioning consultants to assist in the preparation of a Crediton Town Centre Masterplan Supplementary Planning Document (SPD) and Delivery Plan; and
2. To seek Members endorsement of the geographic scope for the Crediton Masterplan Supplementary Planning Document.

RECOMMENDATIONS:

1. **That delegated authority be given to the Director of Place, in consultation with the Cabinet Member for Planning and Economic Regeneration, to engage consultants to assist with the preparation of a Crediton Town Centre Masterplan and Delivery Plan; and**
2. **That the geographic scope in Appendix 1 be approved.**

Financial Implications: £60,000 has been identified within the 22/23 service budget for the Masterplan project.

This report does not at this stage identify the additional funding sources or arrangements that will be needed to deliver the regeneration opportunities that will be identified within the draft Masterplan. Funding is likely to involve a range of public and private sector investment and it is anticipated that the masterplan will also help support potential future funding bids.

Budget and Policy Framework: As referred to above, this masterplanning work would be funded from within the 22/23 service budget, previously identified through the budget setting process.

Both the adopted Mid Devon Local Plan Review and the Corporate Plan set the Policy Framework for the Crediton Town Centre Masterplan. More detailed policy context is set out later in this report. Once adopted, the masterplan would have Supplementary Planning Document status and be a material consideration for planning decision making purposes. This project allows the opportunity to identify measures in support of the Air Quality Action Plan (AQAP) liaising across District Council departments to realise core corporate objectives.

Legal Implications: In order for the masterplan to be adopted as a Supplementary Planning Document, public consultation needs to take place in accordance with the requirements of the Council's Statement of Community Involvement. Whilst not forming part of the Development Plan, it will be a material consideration in the determination of planning applications.

Risk Assessment: Crediton town centre has problems in relation to air quality, the physical condition of town centre properties (above the shop and behind the main streets) and public realm. There is a risk that without a masterplan focussing on regenerating the existing town and co-ordinating the provision of infrastructure, services and facilities, Crediton could become less sustainable and the town centre could deteriorate.

Equality Impact Assessment: Equality issues will be an integral element of the masterplanning work and an equality impact assessment will be made available at the consultation stage.

Relationship to Corporate Plan: The Crediton Masterplan provides an opportunity to contribute towards all four corporate priorities of economy, homes, community and environment and assist in the delivery of many of aims identified within the Corporate Plan.

Impact on Climate Change: A key component of the Town Centre Masterplanning work will be to support the Council's commitment to achieving net zero carbon emissions by 2030. The proposed brief in Appendix 2 sets out the importance of sustainable and active travel, along with seeking measures to improve the local environment and contribute towards tackling climate change through greening of the town centre, increasing biodiversity and encouraging low carbon/energy efficiency.

1 BACKGROUND

At its meeting of the 7th March 2019, Cabinet agreed the scope and geographical area of the Crediton Town Centre Masterplan and resolved that “delegated authority be given to the Head of Planning, Economy and Regeneration in consultation with the Cabinet Member for Planning and Economic Regeneration to engage consultants to assist with the preparation of a Crediton Town Centre Masterplan and Delivery Plan in the budget year 20/21”. This work has been delayed as a result of staff resource being prioritised to respond to economic covid recovery work through the provision of urgent business assistance and the administration of grant support. Over the last few months work has again resumed on this project in liaison with Crediton Town Council. The delay has provided officers with the opportunity to reflect on the additional challenges that High Streets have experienced since the start of the pandemic, the cost of living crisis and the growing importance of tackling climate change. It has also provided an opportunity to look afresh at the geographic scope of the project.

2 PLANNING POLICY BACKGROUND

- 2.1 The intention is that the Masterplan will be adopted as a Supplementary Planning Document (SPD), as such it will need to accord with the direction set out in the National Planning Policy Framework (NPPF) and accompanying Planning Practice Guidance. It specifically adds detail, guidance and clarification to policies within the Mid Devon Local Plan Review (Adopted July 2020). The Masterplan document should be used as a reference point when developing proposals for the Town Centre. The Masterplan SPD will be a material consideration for the determination of planning applications. It provides a framework to guide development, facilitate positive change and ensure that high quality place making is embedded into future development projects within the centre. Mid Devon District Council's Statement of Community Consultation requires two stages of public consultation on SPDs, firstly at the options stage and secondly on the draft document itself.
- 2.2 The Crediton Neighbourhood Plan will also be an important policy consideration. The Crediton Neighbourhood Plan is at an advanced stage. Following the independent examination of the Crediton Neighbourhood Plan, Mid Devon District Council has determined that the plan, as modified to incorporate the Examiner's recommendations, should proceed to a Referendum. The referendum is scheduled to take place on the 22nd September 2022.
- 2.3 The key policies within the Adopted Local Plan, along with other policy documents, relating to Crediton Town Centre are set out in Appendix 2 as part of a proposed brief.

3 THE ROLE AND PURPOSE OF A MASTERPLAN

- 3.1 Key to the delivery of town centre enhancements is the development of a masterplan to guide the process. A masterplan is a comprehensive plan that sets out principles for the way in which improvements can be realised, coordinating policy and planning requirements. It is considered important that the town centre is the subject of a masterplanning process to ensure that the development, regeneration and enhancement of the town centre develops in tandem with planned growth elsewhere in and around the town.
- 3.2 The SPD will guide town centre enhancements in a way that:
- supports the economic development of the town centre;
 - encourages safe walking, cycling and inclusive access throughout the area;
 - respects and enhances the heritage of this historic market town; and
 - strengthens local communities and tackles climate change.
 - Accords with other key policy documents – including the soon to be adopted Crediton Neighbourhood Plan
- 3.3 Once the masterplan is finalised it will set out the firm direction for investment and enhancement of the town and provide the basis for detailed consultation with all interested parties. As referred to above the masterplan would require two stages of public consultation.
- 3.4 It is proposed that the masterplan would include a delivery plan to ensure that the masterplan outcomes are deliverable. This would include details of potential incentives and funding opportunities.
- 3.5 It is anticipated that the work on this SPD would be completed by the Autumn 2023.

4 OBJECTIVES AND SCOPE

- 4.1 The Masterplan should provide a clear strategy to enable Crediton Town Centre to meet its full potential as an attractive, thriving vibrant place with a strong economic function, now and into the future. It will seek to addresses issues, makes recommendations for the enhancement of the town centre, as well as enhanced walking and cycling provision and set out delivery and funding options.
- 4.2 The masterplan should seek to strengthen the economy by creating new opportunities for businesses, jobs, shops, leisure, heritage and culture, and public spaces to make the town a healthier, more attractive place to shop, relax and stay, strengthening the town's role as a growing market town. It should also consider sustainable transport options, movement and links which are supportive of the AQAP priorities.
- 4.3 Importantly consideration of longer term major infrastructure interventions (i.e. new roads) are not included within the scope of this Masterplan project. Any such longer term major infrastructure assessment would need to be addressed as part of the review of the current local plan to inform development considerations post 2033 in conjunction with the County Council. Given Devon County Council's strategic role as Highways Authority findings/recommendations from the masterplan work will be shared with the County Council to enable joint discussions regarding implications for future plans and associated infrastructure developments such as the Local Cycling and Walking Infrastructure programme.
- 4.4 The key objectives of the masterplan are considered to be:
- Improving the quality of the town centre in terms of heritage, public realm, air quality and general amenity.
 - Improving sustainable transport, walking and cycling within the town.
 - Reviewing car parking and identification of how these may deliver public realm benefits.
 - Maintaining a prosperous town centre.
 - Improving the identity, character and visitor experience.
 - Identifying enhancement opportunities within / adjacent to the town centre.
 - Contributing towards tackling climate change and encouraging biodiversity.
 - Ensuring that the all interventions are deliverable – with clear actions and reasonable timescales, accounting for resources and funding.
- 4.5 A map of the centre of Crediton showing the suggested geographical area of the masterplan is attached as **Appendix 1**. There is a change proposed to the map previously considered by Cabinet on the 7th March 2019. The change proposed is that St Saviour's Way Car Park be included within the study area to allow for improvements to be identified at this important arrival point in the town and also to enable a review of car parking to be undertaken as part of the study.
- 4.6 For more information regarding the proposed scope of the masterplan a brief is included in Appendix 2 which has been developed in liaison with Crediton Town Council.

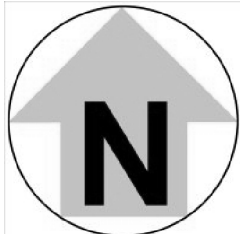
Contact for more Information: Adrian Welsh, Strategic Manager – Growth, Economy and Delivery 01884 234398 awelsh@middevon.gov.uk

List of Background Papers:

7 March 2019 Cabinet Report

[Cabinet Report. Crediton TC Masterplan final.pdf \(middevon.gov.uk\)](#)

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Title

Crediton Town Centre Masterplan Boundary

Community Development & Regeneration

Scale 1:4,562 @ A3

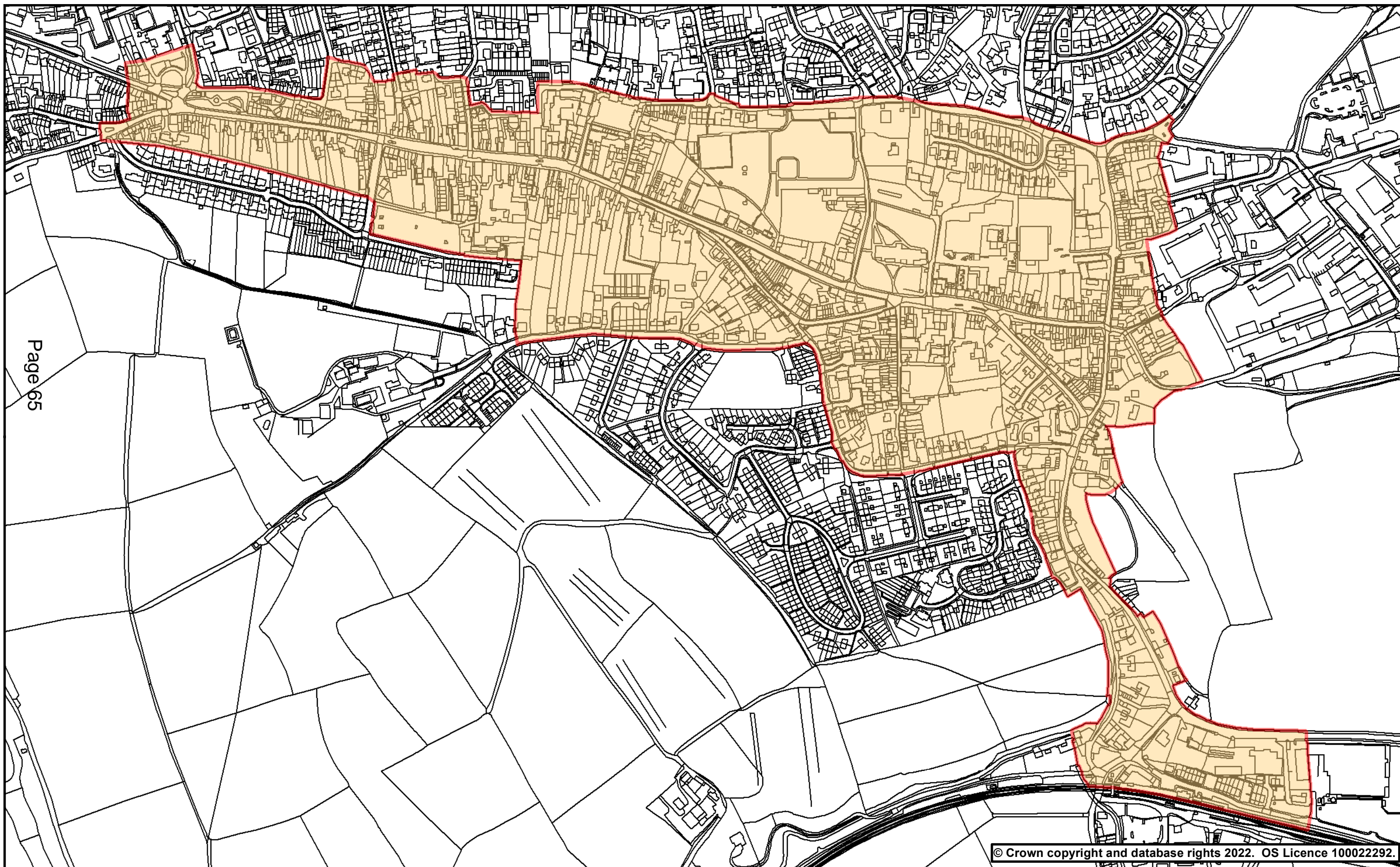
Date 21 September 2022

Drg. No.

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CREDITON TOWN CENTRE MASTERPLAN BRIEF

BACKGROUND & POLICY CONTEXT

Crediton Background

Crediton is the smallest of the three towns in Mid Devon but serves a large rural population. Crediton is located on the A377, Exeter to Barnstaple Road. The town centre currently suffers from negative impacts of through traffic which compromises the town's general amenity and also brings associated air quality problems. Crediton was designated as an Air Quality Management Area in 2004.

Crediton has a host of challenges such as the difficulties being experienced in the high street retail and hospitality sectors, a lack of investment (particularly with regard to its heritage buildings), through traffic and poor air quality, along with a number of other problems experienced by market towns in these disconcerting economic times.

The intention is that the Masterplan will be adopted as a Supplementary Planning Document (SPD), as such it will need to accord with the direction set out in the National Planning Policy Framework (NPPF) and accompanying Planning Practice Guidance. It specifically adds detail, guidance and clarification to the suite of documents comprising the Mid Devon Local Plan Review (Adopted July 2020). The Masterplan document should be used as a reference point when developing proposals for the Town Centre. The Masterplan SPD will be a material consideration for the determination of planning applications. It provides a framework to guide development, facilitate positive change and ensure that high quality place making is embedded into future development projects within the centre. Mid Devon District Council's Statement of Community Consultation requires two stages of public consultation on SPDs, firstly at the options stage and secondly on the draft document itself.

The SPD will guide town centre enhancements in a way that:

- supports the economic development of the town centre;
 - encourages safe walking, cycling and inclusive access throughout the area;
 - respects and enhances the heritage of this historic market town; and
 - strengthens local communities and tackle climate change
- Accords with other key policy documents – including the soon to be adopted Crediton Neighbourhood Plan

The Adopted Local Plan

The Mid Devon Local Plan Review 2013-2033 (adopted July 2020) identifies Crediton as a small and vibrant market town. Policy S12 states that:

"Policy S12 - Crediton

Crediton will continue to develop in its role as a small and vibrant market town, serving a rural hinterland in the western part of the district. The strategy aims to improve access to housing within the town, expand employment opportunities and improve the quantity and quality of the existing retail provision. Proposals will provide for approximately 786 dwellings, of which 220 will be affordable, and 14,700 gross square metres of commercial floorspace over the plan period.

The following development will be supported over the plan period:

- a) Proposals which support the economic regeneration of the town centre, including the provision of new homes, commercial development, cultural facilities and other key town centre uses which support the town centre's viability and vitality. Particular support will be given for proposals which improve the quantity and quality of existing retail provision within the town centre. All proposals within the town centre will need to play a positive role in sustaining and enhancing the significance of the area's heritage;*
- b) Proposals which respect the setting provided by the open areas of hillside and the adjoining historic parklands of Creedy Park, Shobrooke Park and Downes;*

- c) Continuation of measures to support the implementation of the Crediton Air Quality Action Plan, including enhanced walking and cycling opportunities around the town;*
- d) Enhance the tourism facilities and visitor role of the town and surrounding area; and*
- e) Community and education facilities and other infrastructure to support the development proposed, including green infrastructure.”*

Policies CRE1-CRE10 of the Adopted Local Plan allocates land to support Policy S12; providing 768 dwellings and 9,820sqm of commercial development within the settlement limit of Crediton.

In addition, Policy CRE11 identifies that funds secured through development proposals along with other external sources of funding will support the delivery of the physical regeneration and enhancement of the town:

“Crediton Infrastructure

The Council will use the Community Infrastructure Levy (CIL) and planning obligations where appropriate, seek external sources of funding and work with partners to deliver the following infrastructure for Crediton:

- a) Enhanced pedestrian and cycle facilities to serve development;*
- b) Bus service enhancements;*
- c) Air quality improvements;*
- d) Expansion and improvement of primary and secondary education facilities;*
- e) Public open space and green infrastructure;*
- f) Expansion of emergency fire and rescue services;*
- g) Library reconfiguration to provide Devon Centre;*
- h) Extra care housing;*
- i) Community facilities including provision for children / youth;*
- j) Potential highway improvements; and*
- k) Provision of works to reduce flood risk.”*

Since the plan was adopted the District Council has decided not to pursue a CIL charge; however, funds will be secured via S106.

Furthermore, those conducting the work must also consider policy DM14 “Town Centre Development” in the Adopted Local Plan:

“The Council will promote the sustainable growth and regeneration of Tiverton, Cullompton and Crediton. Within defined town centres, development proposals for main town centre uses, community and residential development will be supported where they:

- a) Retain or enhance the town centre’s historic character and appearance, vitality and viability;*
- b) Sustain or enhance diverse town centre uses and customer choice, incorporating residential accommodation above ground floor level where possible; and*
- c) Are readily accessible by public transport, walking and cycling.*

Within defined primary shopping areas, the shopping function will be safeguarded and enhanced. Development and change of use of ground floor premises to alternative uses will not be permitted where:

- i) The primary retail role and character is undermined, causing unacceptable fragmentation and isolation of the remaining shops;*
- ii) The proposed use would harm the vitality and viability of the primary shopping area; and*
- iii) There would be a detrimental effect on the visual character and amenities of the surrounding area.*
- iv) Within primary shopping frontages, at ground floor level the proportion of A1, A2 and A3 uses will not be permitted to fall below 85% of all units.”*

The successful candidates need to be mindful of the national changes to the use classes order (2021), with the addition of class E and permitted development rights.

For more info: [Adopted Local Plan and Policies Maps - MIDDEVON.GOV.UK](https://www.middevon.gov.uk/adopted-local-plan-and-policies-maps)

Crediton Neighbourhood Plan

The Crediton Neighbourhood Plan is at an advanced stage. Following the independent examination of the Crediton Neighbourhood Plan, Mid Devon District Council has determined that the plan, as modified to incorporate the Examiner's recommendations, should proceed to a Referendum. The referendum is scheduled to take place on the 22 September 2022. The Crediton Neighbourhood Plan will be an important policy consideration.

For more info: [Crediton Neighbourhood Plan - MIDDEVON.GOV.UK](https://www.middevon.gov.uk/crediton-neighbourhood-plan)

The Crediton Conservation Area Appraisal

The Conservation Area was designated in 1981 and extended in 1990. Further amendments have been made in March 2003. It encompasses the central commercial core of the town, together with several predominantly residential areas, Queen Elizabeth College to the west, Holy Cross Church to the east, Peoples Park to the north and development associated with the railway to the south.

For more info: [Crediton Conservation Area Appraisal - MIDDEVON.GOV.UK](https://www.middevon.gov.uk/crediton-conservation-area-appraisal)

Crediton Air Quality Action Plan

Crediton was formally designated an Air Quality Management Area (AQMA) in 2004 encompassing the majority of the built-up area of the town. This AQMA remains the place as a result of exceedances of the annual mean National Air Quality Objective for Nitrogen Dioxide (NO₂), largely as a result of road traffic emissions. In November 2021, Mid Devon District Council adopted an updated Air Quality Action Plan (AQAP). The AQAP priorities are to protect residents from the harmful impacts of poor air quality by reducing concentrations of NO₂ to within legal limits and beyond, in all areas where there they are at risk due to exposure, in particular town-centre locations. Alongside this objective, the Council are also committing to reducing levels of all pollutants in ambient air, with a focus on harmful ultra-fine particulate matter (called PM_{2.5}).

There are a number of strategic policies within the current MDDC Local Plan which relate to air quality, four of which are relevant to Crediton. They are the S1 Sustainable Development Priorities, S2 Amount and Distribution of Development, S7 Town centres, S8 Infrastructure and S12 Crediton. In addition to policy CRE11 (Crediton Infrastructure), one of the key messages from this set of policies is to prevent and improve air quality issues within the area, specifically at Crediton. The AQAP was developed in this context and sets out town-centre traffic management measures, improved infrastructure for new developments and a range of other measures. The aim is to offer co-benefits for air quality and other planning objectives working in conjunction an updated Air Quality SPD (due for adoption later in 2022) with monitoring to assess if pollutants have been reduced to a level where AQMAS can be withdrawn.

The Council is aiming to commission additional resource in 2022 to develop an AQAP delivery plan and provide expert guidance on implementation utilising existing and new s106 monies and other potential grant funding. Work on the town centre Masterplan will need to be developed in synergy with this and within the overall context provided by the AQAP.

SCOPE OF THE CREDITON TOWN CENTRE MASTERPLAN

The aim of the masterplan is to provide a clear strategy to ensure that Crediton town centre meets its full potential as an attractive, thriving vibrant place with a strong economic function, now and into the future.

Crediton town centre should be a place of choice and quality, with a good range of shops, services, cultural and leisure opportunities, offering something different to nearby centres, set within an attractive and pleasant environment reflecting the history and character of the place. It will provide a comprehensive masterplan for the town centre which addresses the key issues, makes recommendations for regeneration and enhancement of the town centre, as well as a wider focus on transport infrastructure and set out delivery and funding options.

The masterplan should seek to strengthen the economy by creating new opportunities for businesses, jobs, shops, leisure, heritage and culture, and public spaces to make the town a healthier, more attractive place to shop, relax and stay, strengthening the town's role as a growing market town. It should also consider sustainable transport options, movement and links which are supportive of the AQAP priorities.

Importantly consideration of longer term major infrastructure interventions are not included within the scope of this Masterplan project. Any such longer term major infrastructure assessment would need to be addressed by the Highway Authority, as part of the review of the current local plan to inform development considerations post 2033; however findings from masterplan work can be passed onto the County Council to inform them with this, and any other, future work.

Overall Project Aims

Key Objectives

The key objectives of the masterplan are considered to be:

- Improving the quality of the town centre in terms of heritage, public realm, air quality and general amenity.
- Improving sustainable transport, walking and cycling within the town.
- Reviewing car parking and identification of how these may deliver public realm benefits.
- Maintaining a prosperous town centre.
- Improving the identity, character and visitor experience.
- Identifying enhancement opportunities within / adjacent to the town centre.
- Contributing towards tackling climate change and encouraging biodiversity.
- Ensuring that the all interventions are deliverable – with clear actions and reasonable timescales, accounting for resources and funding. This links to the delivery plan requirement.

The Masterplan would need to explore specifically:

- Identification of important town centre features which would benefit from enhancement such as key buildings, High Street frontages and key town centre gateway locations;
- Potential for active and sustainable travel improvements e.g. cycle/pedestrian route enhancements, mobility hubs, cycle parking etc, drawing on analysis undertaken within the Traffic and Urban Realm Study 2018 Phil Jones Associates (Credition Town Council);
- The geographical scope of the project includes Credition Railway Station. Improved cycle/pedestrian access between the station and the town needs to be considered which can include routings outside of the geographical scope if this provides a more attractive or safer option;
- The development of proposals for the Union Road Toilet Block area in order to improve the appearance of the area and enhance views towards the Newcombes Meadow Park (potentially progressing this to an SOBC stage);
- A review of car parking arrangements for the town;
- Consideration of air quality measures for the town;
- Potential measures to improve the local environment and contribute towards tackling climate change through greening of the town centre, increasing biodiversity and encouraging low carbon/energy efficiency;
- Identification of potential funding opportunities; and
- Identify opportunities for enhanced flexible working to reflect changing patterns in people's working habits.

The Masterplan will need to be accompanied by a Delivery Plan setting out the role of key partners in delivering identified projects.

Project Timing and Programme

Key deadlines associated with this commission for a Credition Town Centre masterplan are set out in Table 1 below. It is expected that the successful applicant(s) will produce the masterplan commission within the timescale set out.

Documents issued to Applicants (ITT)	October/November 2022
Clarification questions to be submitted by	November 2022
Clarification responses to be issued by	November 2022
Applicants presentation	November/December 2022
Award of Contract	January 2023
Inception stage meeting	January/February 2023
Phase One Consultation material prepared (Scoping)	February/March 2023
Election Period – PURDAH (6 weeks)	March-May 2023
6 week consultation	May/June 2023
Draft Masterplan	June/July 2023
6 week public consultation	July/August 2023
Adoption at Council	September/October 2023

Mid Devon District Council reserves the right to change the above timetable and applicants will be notified accordingly if there is any change.

Project lead:

Mid Devon District Council's project lead will be:

Adrian Welsh

Group Manager for Growth, Economy & Delivery

And

Mollie Fawell

Growth and Regeneration Officer

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MID DEVON DISTRICT COUNCIL – NOTIFICATION OF KEY DECISIONS

November/December 2022

The Forward Plan containing key Decisions is published 28 days prior to each Cabinet meeting

Title of report and summary of decision	Decision Taker	Date of Decision	Officer contact	Cabinet Member	Intention to consider report in private session and the reason(s)
Crediton Neighbourhood Plan - Decision to Adopt (subject to referendum result) To adopt the Neighbourhood Plan.	Cabinet Council	4 Oct 2022 26 Oct 2022	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Part exempt
Medium Term Financial Plan To consider the Medium Term Financial Plan	Cabinet	1 Nov 2022	Andrew Jarrett, Deputy Chief Executive (S151) Tel: 01884 234242	Cabinet Member for Finance (Councillor Andrew Moore)	Open
Crediton Master plan – procurement To receive the Crediton Master plan – procurement	Cabinet	1 Nov 2022	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Part exempt

Title of report and summary of decision	Decision Taker	Date of Decision	Officer contact	Cabinet Member	Intention to consider report in private session and the reason(s)
Review of Development Management - Discretionary Fees To consider a review of discretionary fees	Cabinet	1 Nov 2022	Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Electric Vehicle Car Sharing Options To receive an options paper on progressing Electric Vehicle Car Sharing options in the district and to make recommendations to the Cabinet to progress a scheme	Environment Policy Development Group Cabinet	8 Nov 2022 29 Nov 2022	Andrew Busby, Corporate Manager for Property, Leisure and Climate Change Tel: 01884 234948	Cabinet Member for the Environment and Climate Change (Councillor Colin Slade)	Open
Tiverton Town Centre Masterplan To receive a draft copy of the Tiverton Town Centre Masterplan	Economy Policy Development Group Cabinet	10 Nov 2022 29 Nov 2022	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open

Title of report and summary of decision	Decision Taker	Date of Decision	Officer contact	Cabinet Member	Intention to consider report in private session and the reason(s)
Crediton Shopfront Scheme To receive a report outlining the Crediton Shopfront Scheme	Economy Policy Development Group Cabinet	10 Nov 2022 29 Nov 2022	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
3 Rivers Development Ltd Business Plan. To receive the company business plan and if appropriate to make recommendations to Audit Committee on 22 November and / or Cabinet on 29 November.	Scrutiny Committee Audit Committee Cabinet	14 Nov 2022 22 Nov 2022 29 Nov 2022	Deputy Chief Executive (S151) Andrew Jarrett, Deputy Chief Executive (S151) Tel: 01884 234242	Cabinet Member for Finance (Councillor Andrew Moore)	Part exempt
HRA CCTV Policy The receive the new HRA CCTV Policy	Homes Policy Development Group Cabinet Council	15 Nov 2022 29 Nov 2022 14 Dec 2022	Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing Tel: 01884 244615	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Open

Title of report and summary of decision	Decision Taker	Date of Decision	Officer contact	Cabinet Member	Intention to consider report in private session and the reason(s)
Revised Procurement Strategy To receive the refreshed Procurement Strategy	Audit Committee Cabinet	22 Nov 2022 29 Nov 2022	Councillor Andrew Moore, Cabinet Member for Finance	Cabinet Member for Finance (Councillor Andrew Moore)	Open
Leisure Pricing Strategy To agree to give the Cabinet member for Community Wellbeing the delegated authority to approve the Leisure Pricing Strategy	Community Policy Development Group Cabinet	22 Nov 2022 3 Jan 2023	Lee Chester, Operations Manager Leisure Services	Cabinet Member for Community Well Being (Councillor Dennis Knowles)	Fully exempt
Cullompton Town centre Relief Road - Update	Cabinet	29 Nov 2022	Adrian Welsh, Strategic Manager for Growth, Economy and Delivery Tel: 01884 234398	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Infrastructure Funding Statement (Infrastructure list) To receive the annual report from the Director of Place.	Cabinet	29 Nov 2022	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	

Title of report and summary of decision	Decision Taker	Date of Decision	Officer contact	Cabinet Member	Intention to consider report in private session and the reason(s)
Infrastructure Funding Statement To approve the Infrastructure List for publication.	Cabinet	29 Nov 2022	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Tiverton Neighbourhood Plan - Decision to Adopt (subject to referendum result) To receive areport from the Director Place regarding the results of the referendum.	Cabinet Council	29 Nov 2022 14 Dec 2022	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	
S106 Monitoring Fees	Cabinet	29 Nov 2022	Dean Emery, Corporate Manager for Revenues, Benefits and Recovery	Cabinet Member for Finance (Councillor Andrew Moore)	Open
Mid Year Treasury Management Report To receive the mid year report.	Cabinet	29 Nov 2022	Andrew Jarrett, Deputy Chief Executive (S151) Tel: 01884 234242	Cabinet Member for Finance (Councillor Andrew Moore)	Open

Title of report and summary of decision	Decision Taker	Date of Decision	Officer contact	Cabinet Member	Intention to consider report in private session and the reason(s)
Parking Permits and Charges 23/24	Environment Policy Development Group Cabinet	8 Nov 2022 29 Nov 2022	Matthew Page, Corporate Manager for People, Governance and Waste	Cabinet Member for the Environment and Climate Change (Councillor Colin Slade)	Open
Climate Change Action Plan update To receive an update on actions taken for the Climate Change Action Plan and to receive Electric Vehicle Car Sharing Options report with recommendations to the Cabinet	Environment Policy Development Group Cabinet	8 Nov 2022 29 Nov 2022	Jason Ball, Climate and Sustainability Specialist	Cabinet Member for the Environment and Climate Change (Councillor Colin Slade)	Open
Recycling Options Paper	Environment Policy Development Group Cabinet	8 Nov 2022 29 Nov 2022	Matthew Page, Corporate Manager for People, Governance and Waste	Cabinet Member for the Environment and Climate Change (Councillor Colin Slade)	Open

Title of report and summary of decision	Decision Taker	Date of Decision	Officer contact	Cabinet Member	Intention to consider report in private session and the reason(s)
Economic Recovery Plan To receive the draft Local Economic Recovery Plan, including an update on the Shared Prosperity Fund and approval of the Rural Prosperity Fund Investment Plan.	Economy Policy Development Group Cabinet	10 Nov 2022 29 Nov 2022	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Market Environmental Strategy To receive a report regarding the Market Environmental Strategy	Economy Policy Development Group Cabinet	10 Nov 2022 29 Nov 2022	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Housing Service Fees and Charges To consider fees and charges.	Homes Policy Development Group Cabinet	15 Nov 2022 29 Nov 2022	Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing Tel: 01884 244615	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Open
Private Sector Housing Fees and Charges To consider revised fees and charges.	Homes Policy Development Group Cabinet	15 Nov 2022 29 Nov 2022	Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing Tel: 01884 244615	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Open

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Title of report and summary of decision	Decision Taker	Date of Decision	Officer contact	Cabinet Member	Intention to consider report in private session and the reason(s)
Housing Strategy update and annual review To consider a review of the strategy.	Homes Policy Development Group Cabinet	15 Nov 2022 29 Nov 2022	Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing Tel: 01884 244615	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Open
Electoral Review Committee - Parish Review	Council	1 Dec 2022	Jill May, Director of Business Improvement and Operations Tel: 01884 234381		
Channel Access Policy To consider a revised Policy	Cabinet	3 Jan 2023	Lisa Lewis, Corporate Manager for Business Transformation and Customer Engagement Tel: 01884 234981	Cabinet for the Working Environment and Support Services (Councillor Clive Eginton)	Open
Collumpton Town Centre Masterplan	Cabinet	3 Jan 2023	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open

Title of report and summary of decision	Decision Taker	Date of Decision	Officer contact	Cabinet Member	Intention to consider report in private session and the reason(s)
Cullompton Town Centre Masterplan and Delivery Plan SPD To consider the masterplan	Cabinet Council	3 Jan 2023 22 Feb 2023	Adrian Welsh, Strategic Manager for Growth, Economy and Delivery Tel: 01884 234398	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open
Post Hill Tiverton–Tender results and project award for 70 Council homes To consider the outcome of the tender process.	Cabinet Council	3 Jan 2023 22 Feb 2023	Andrew Busby, Corporate Manager for Property, Leisure and Climate Change Tel: 01884 234948	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Part exempt
Strategic Allocations Policy & Strategic Tenancy Strategy To consider a revised strategy.	Homes Policy Development Group Cabinet	17 Jan 2023 7 Feb 2023	Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing Tel: 01884 244615	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Open
Empty Homes Plan To consider a revised plan.	Homes Policy Development Group Cabinet	17 Jan 2023 7 Feb 2023	Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing Tel: 01884 244615	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Open

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Title of report and summary of decision	Decision Taker	Date of Decision	Officer contact	Cabinet Member	Intention to consider report in private session and the reason(s)
Housing Assistance Policy To consider a revised policy.	Homes Policy Development Group Cabinet	17 Jan 2023 7 Feb 2023	Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing Tel: 01884 244615	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Open
Town and Parish Charter To approve a draft Town and Parish Charter for consultation.	Community Policy Development Group Cabinet	24 Jan 2023 7 Mar 2023	Forward Planning Team Leader Tristan Peat, Forward Planning Team Leader	Cabinet Member for Community Well Being (Councillor Dennis Knowles)	Open
The Council Tax Reduction Scheme & Exceptional Hardship Policy To receive a review of The Council Tax Reduction Scheme & Exceptional Hardship Policy	Community Policy Development Group Cabinet	24 Jan 2023 7 Feb 2023	Dean Emery, Corporate Manager for Revenues, Benefits and Recovery	Cabinet Member for Finance (Councillor Andrew Moore)	Open
Enforcement Policy To receive a review of the Enforcement Policy if required	Community Policy Development Group Cabinet	24 Jan 2023 7 Mar 2023	Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing Tel: 01884 244615	Cabinet Member for Community Well Being (Councillor Dennis Knowles)	Open

Title of report and summary of decision	Decision Taker	Date of Decision	Officer contact	Cabinet Member	Intention to consider report in private session and the reason(s)
Meeting Housing Needs SPD To approve the draft SPD for consultation.	Cabinet	4 Apr 2023	Tristan Peat, Forward Planning Team Leader	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Open
Asbestos Management Plan To consider a revised plan.	Homes Policy Development Group Cabinet	21 Mar 2023 4 Apr 2023	Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing Tel: 01884 244615	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Open
Neighbourhood & Community Standard Policy To consider a revised policy.	Homes Policy Development Group Cabinet	21 Mar 2023 4 Apr 2023	Simon Newcombe, Corporate Manager for Public Health, Regulation and Housing Tel: 01884 244615	Cabinet Member for Housing and Property Services (Councillor Stuart Penny)	Open
Tiverton EUE Area B masterplan	Cabinet	4 Apr 2023	Richard Marsh, Director of Place	Cabinet Member for Planning and Economic Regeneration (Councillor Richard Chesterton)	Open

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