



**TO COUNCILLOR:**

N Alam  
S S Athwal (Vice-Chair)  
L A Bentley  
G A Boulter  
M H Charlesworth

M L Darr  
J K Ford  
D A Gamble  
C S Gore  
S Z Haq

P Joshi  
J Kaufman  
K J Loydall  
I K Ridley (Chair)

I summon you to attend the following meeting for the transaction of the business in the agenda below.

**Meeting:** Policy, Finance & Development Committee  
**Date & Time:** Tuesday, 3 February 2026, 7.00 pm  
**Venue:** Civic Suite 2, Brocks Hill Council Offices, Washbrook Lane, Oadby, Leicester, LE2 5JJ  
**Special Title:** MTFP & Budget (2026/27)  
**Contact:** Democratic Services  
**t:** (0116) 257 2775  
**e:** democratic.services@oadby-wigston.gov.uk

Yours faithfully

Council Offices  
Oadby  
**26 January 2026**

**Anne E Court**  
Chief Executive



**Meeting ID:** 2966

**ITEM NO.**

**AGENDA**

**PAGE NO'S**

**Meeting Live Broadcast | Information and Link**

This meeting will be broadcast live.

**Press & Public Access:**

A direct link to the live broadcast of the meeting's proceedings on the Council's Civico platform is below.

<https://civico.net/oadby-wigston/23272-Policy-Finance-Development-Committee>

**1. Apologies for Absence**

To receive apologies for absence from Members to determine the quorum of the meeting in accordance with Rule 7 of Part 4 of the Constitution.

## 2. **Appointment of Substitutes**

To appoint substitute Members in accordance with Rule 26 of Part 4 of the Constitution and the Substitution Procedure Rules.

## 3. **Declarations of Interest**

Members are reminded that any declaration of interest should be made having regard to the Members' Code of Conduct. In particular, Members must make clear the nature of the interest and whether it is 'pecuniary' or 'non-pecuniary'.

## 4. **Minutes of the Previous Meeting**

**3 - 6**

To read, confirm and approve the minutes of the previous meeting in accordance with Rule 19 of Part 4 of the Constitution.

## 5. **Action List Arising from the Previous Meeting**

To read, confirm and note the Action List arising from the previous meeting.

## 6. **Petitions and Deputations**

To receive any Petitions and, or, Deputations in accordance with Rule(s) 11 and 12 of Part 4 of the Constitution and the Petitions Procedure Rules respectively.

## 7. **Green Spaces Strategy (2025 - 2035)**

**7 - 29**

Report of the Head of Neighbourhood Services

## 8. **Cemetery and Burial Strategy (2026 - 2036)**

**30 - 75**

Report of the Head of Neighbourhood Services

## 9. **Treasury Management Policy and Strategies and Prudential Indicators (2026/27)**

**76 - 125**

Report of the Finance Manager

## 10. **2025/26 Revenue Budgets, Medium Term Financial Plan and 2026/27 - 2030/31 Capital Programmes**

**126 - 164**

Report of the Chief Finance Officer / S151 Officer and the Finance Manager

## 11. **Leicester & Leicestershire Authorities - Statement of Common Ground Relating to Housing Distribution Following NPPF and New Standard Method Published December 2024**

**166 - 191**

Report of the Senior Planning Policy Officer

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**MINUTES OF THE MEETING OF THE POLICY, FINANCE & DEVELOPMENT COMMITTEE  
HELD AT CIVIC SUITE 2, BROCKS HILL COUNCIL OFFICES, WASHBROOK LANE, OADBY,  
LEICESTER, LE2 5JJ ON TUESDAY, 2 DECEMBER 2025 COMMENCING AT 7.00 PM**

## **PRESENT**

I K Ridley  
S S Athwal

Chair  
Vice-Chair



**Meeting ID: 2947**

## **COUNCILLORS**

N Alam  
L A Bentley  
G A Boulter  
M H Charlesworth  
J K Ford  
D A Gamble  
C S Gore  
S Z Haq  
P Joshi  
J Kaufman  
K J Loydall

## **OFFICERS IN ATTENDANCE**

S J Ball	Legal & Democratic Services Manager / Monitoring Officer (Solicitor)
M Smith	Community Safety & Youth Officer
A Thorpe	Head of Built Environment
C Warren	Chief Finance Officer / Section 151 Officer
S Wheeliker	Senior Democratic & Electoral Services Officer

### **105. APOLOGIES FOR ABSENCE**

An apology for absence was received from Councillor M L Darr.

### **106. APPOINTMENT OF SUBSTITUTES**

None.

### **107. DECLARATIONS OF INTEREST**

None.

### **108. MINUTES OF THE PREVIOUS MEETING**

By affirmation of the meeting, it was

#### **UNANIMOUSLY RESOLVED THAT:**

**The minutes of the previous meeting held on 9 September 2025 be taken as read, confirmed and approved.**

### **109. ACTION LIST ARISING FROM THE PREVIOUS MEETING**

None.

**110. PETITIONS AND DEPUTATIONS**

None.

**111. BUDGET MONITORING (Q2 2025/26)**

The Committee gave consideration to the report and appendices (as set out at pages 8 – 18 of the agenda reports pack) which provided the Committee with the forecast Outturn position for the Council for the financial year 2025/26, at the end Quarter 2.

It was moved by the Chair, seconded by the Vice-Chair and

**UNANIMOUSLY RESOLVED THAT:**

- i) The contents of the report and the appendices be noted; and**
- ii) The carry forward of slippage as shown in the Capital projects be approved.**

**112. SUNDRY DEBTOR AND REVENUES WRITE OFFS (Q2 2025/26)**

The Committee gave consideration to the report (as set out at pages 3 – 6 of the first agenda update) which provided Members with an update on the status of debts written off under delegated powers.

Councillors requested that the council tax write offs be broken down to show the amounts lost to each authority in future reports. The Chief Finance Officer confirmed this would be included from now on.

By general affirmation of the meeting, it was

**UNANIMOUSLY RESOLVED THAT:**

**The contents of the report and appendix be noted.**

**113. TREASURY MID-YEAR REPORT (2025/26)**

The Committee gave consideration to the report and appendices (as set out at pages 19 - 35 of the agenda reports pack) which detailed the performance and activities of the authority's treasury management function for the financial year 2025/26 to 30 September 2025.

By general affirmation of the meeting, it was

**UNANIMOUSLY RESOLVED THAT:**

**The content of the report and appendices be noted.**

**114. TOWN CENTRE WIFI AND FOOTFALL - REVIEW OF SYSTEMS**

In accordance with Rule 6.3 of Section 1 of Part 4 of the Constitution, the Chair moved for the order of business to be altered and taken in the order as reflected in the minutes.



The Committee gave consideration to the report (as set out at pages 39 – 42 of the agenda reports pack and pages 2 -3 of the second agenda update) which investigated the continued use of the public Wi-Fi and footfall monitoring in the Borough.

Councillor M H Charlesworth suggested that the recommendation include 'an alternative more cost-efficient and accurate means of counting footfall' (emphasis added) which was accepted by the proposer and seconder.

It was also suggested by the Head of Built Environment that the Chair of Policy, Finance & Development Committee and the Chair of Place Shaping & Climate Change Working Group be involved in the procurement process for the replacement technology, which was also accepted by the proposer and seconder.

It was moved by Councillor S Z Haq, seconded by Councillor J Kaufman, and

**UNANIMOUSLY RESOLVED THAT:**

- i) The content of the report be noted;**
- ii) The Council proceed along the lines set out in Option 4 of this report (to stop providing free Wi Fi and to move to an alternative more cost-efficient and accurate means of counting footfall); and**
- iii) The Chairs of the Policy, Finance & Development Committee and Place Shaping & Climate Change Working Group be involved in the procurement process.**

**115. 2026/27 DRAFT REVENUE BUDGETS, MEDIUM TERM FINANCIAL PLAN AND 2026/27 - 2030/31 DRAFT CAPITAL PROGRAMMES**

The Committee gave consideration to the report (as set out at pages 7 – 13 of the first agenda update) which presented the revised General Fund Annual Budget for 2026/27 and an updated MTFP for 2026/27 to 2030/31, and also provided an update on the capital programme for 2026/27 as well as the HRA Annual Budget for 2025/26.

By general affirmation of the meeting, it was

**UNANIMOUSLY RESOLVED THAT:**

- i) The contents of the report be noted; and**
- ii) The intention to increase Housing Rents, Garages and Service Charges by a minimum of 4.8%, pending the outcome of the Rent Convergence review currently underway be noted.**

**116. RESIDENT FORUM FUNDING REQUESTS**

The Committee gave consideration to the report (as set out at pages 36 – 38 of the agenda reports pack) which sought approval for funding to be released to the Oadby Residents Forum for the requesting party.

It was moved by Councillor D A Gamble, seconded by Councillor J Kaufman, and

**UNANIMOUSLY RESOLVED THAT:**

- i) The content of the report be noted; and**
- ii) The request for funding to be released to the Oadby 50 Plus Group be**

**approved.**

**117. EVENT BOOKING & VENUE HIRE POLICY (2025)**

The Committee gave consideration to the report and appendices ( as set out at pages 14 – 25 of the first agenda update pack) which sought approval for the Event Booking and Venue Hire Policy (2025).

It was moved by the Chair, seconded by the Vice-Chair, and

**UNANIMOUSLY RESOLVED THAT:**

- i) The Event Booking and Venue Hire Policy (2025) (as set out at Appendix 1 to this report) be approved; and**
- ii) The Information Sheet for Event Booking and Venue Hire (as set out at Appendix 2 to this report) be approved.**

**118. STANDARDS & ETHICAL INDICATORS (Q2 2025/26)**

The Committee gave consideration to the report and appendix (as set out at pages 43 – 53 of the agenda reports pack) which presented the figures for local determination of complaints and ethical indicators for Q2 2025-26.

By general affirmation of the meeting, it was

**UNANIMOUSLY RESOLVED THAT:**

**The content of the report and appendix be noted.**

**THE MEETING CLOSED AT 8.32 pm**



<b>Policy, Finance and Development Committee</b>	<b>Tuesday, 03 February 2026</b>	<b>Matter for Information and Decision</b>
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**Report Title:** **Green Spaces Strategy (2025 - 2035)**

**Report Author(s):** **Ben Wilson (Head of Neighbourhood Services)**

<b>Purpose of Report:</b>	To provide Members with the outcome of the consultation on the Green Spaces Strategy (2025 - 2035).
<b>Report Summary:</b>	The report proposes the final Green Spaces Strategy (2025 - 2035) which in turn will inform the management of the Parks and Opens Spaces within the Borough.
<b>Recommendation(s):</b>	<b>A. That Members note the feedback from the consultation; and B. That the Green Space Strategy (at Appendix 1) be adopted.</b>
<b>Senior Leadership, Head of Service, Manager, Officer and Other Contact(s):</b>	Ben Wilson (Head of Neighbourhood Services) <a href="mailto:ben.wilson@oadby-wigston.gov.uk">ben.wilson@oadby-wigston.gov.uk</a> 0116) 257 2711  Teresa Neal (Strategic Director) <a href="mailto:teresa.neal@oadby-wigston.gov.uk">teresa.neal@oadby-wigston.gov.uk</a> (0116) 257 2642
<b>Strategic Objectives:</b>	Our Communities (SO2) Our Council (SO1) Our Environment (SO4) Our Partners (SO5)
<b>Vision and Values:</b>	Customer & Community Focused (V1) Collaborative & Creative (V3) Proud of Everything We Do (V2) "Our Borough - The Place To Be" (Vision)
<b>Report Implications:-</b>	
Legal:	There are no implications arising from this report.
Financial:	There are no implications arising from this report.
Corporate Risk Management:	Reputation Damage (CR4) Effective Utilisation of Assets / Buildings (CR5) Organisational / Transformational Change (CR8)
Equalities and Equalities Assessment (EA):	There are no implications arising from this report. Initial EA Screening (See Appendices)
Human Rights:	There are no implications arising from this report.
Health and Safety:	There are no implications arising from this report.

<b>Statutory Officers' Comments:-</b>	
Head of Paid Service:	The report is satisfactory.
Chief Finance Officer:	The report is satisfactory.
Monitoring Officer:	The report is satisfactory.
<b>Consultees:</b>	None.
<b>Background Papers:</b>	None.
<b>Appendices:</b>	<ol style="list-style-type: none"> <li>1. Green Spaces Strategy (2025 - 2035)</li> <li>2. Equality Impact Assessment</li> </ol>

## **1. Background**

- 1.1 Parks and open spaces are fundamental to the health, well-being, and quality of life of any urban community. In Oadby and Wigston, these green spaces act as vital havens amid a rapidly urbanising landscape, offering residents and visitors opportunities for recreation, relaxation, and connection with nature.
- 1.2 From well-maintained local parks to tranquil nature reserves and green corridors, Oadby and Wigston is home to a diverse range of open spaces that support both environmental sustainability and the social fabric of the community.
- 1.3 Several services play a role in the functioning of Oadby and Wigston's parks or have a stake in how they are used, including corporate assets, grounds maintenance, planning policy, community engagement, health and wellbeing, community safety, and climate change.

## **2. Why a change is needed**

- 2.1 As Oadby and Wigston continues to develop, the demand for accessible, high-quality outdoor spaces becomes increasingly critical.
- 2.2 The Green Spaces Strategy for Oadby and Wigston is a comprehensive plan aimed at protecting, enhancing, and expanding these valuable green spaces to meet the evolving needs of a growing population.
- 2.3 This strategy:
  - Outline's the approach for managing, protecting and developing green spaces which gives consideration to the Council's resources, management and maintenance responsibilities and the contributions from community and interest groups.
  - Highlights a set of principles which will guide future maintenance, investment, community engagement decisions and actions regarding our green spaces.
  - Agree a set of priorities which focus effort, resources and decision making, ensuring that our green spaces remain high quality spaces for everyone to enjoy.
  - Help secure additional investment and external funding towards enhancing infrastructure, faculties and opportunities for the benefit of the community.

2.4 The successful delivery of the strategy's objectives will rely on several key factors:

- The active support and contribution of our partners and stakeholders in delivering high-quality work.
- Securing consistent and sufficient funding throughout the strategy's lifespan.
- Establishing a clear and effective monitoring framework, with defined milestones and achievements to assess progress.
- Ensuring the strategy is widely communicated and promoted in a variety of formats to foster ongoing stakeholder engagement.

### **3. Environmental Implications**

3.1 The strategy also supports the Council's Climate Action plan and climate change mitigation by focusing on enhancing green spaces, which play a vital role in reducing carbon emissions. Well-maintained parks and open spaces act as carbon sinks, absorbing CO2 and improving air quality.

3.2 Additionally, increasing the biodiversity and the number of trees and plants in these areas can help counterbalance the environmental impact of urbanisation.

3.3 The strategy also encourages sustainable practices such as using environmentally friendly materials in park designs, reducing waste, and promoting green infrastructure and sustainable drainage systems.

### **4. Overall Consultation & Response Information**

4.1 At the Policy, Finance and Development Committee held on the 9 September 2025, Members approved for the strategy to go out for consultation.

4.2 The consultation commenced on 6 October 2025 and closed on 17 November 2025 (6 weeks) with 50 responses being received. Of which, 50% of respondents were over 70 years of age, with 26% of respondents being between 61-70 years of age. (31-40 years = 8%, 41-50 years = 8%, 51-60 years = 8%).

4.3 96% of respondents live within the borough and the remaining 4% being part of a community group within the borough. 88% of respondents typically use the boroughs open spaces for walking, followed by running, socialising and using play equipment.

4.4 The consultation was broken down into 6 key areas with 16 questions overall. This was open to all stakeholders including residents, visitors, and businesses.

### **5. Consultation Section: Quality & Accessibility**

5.1 Question - How would you rate the overall quality and maintenance:

- Excellent – 6%
- Good – 46%
- Fair – 40%
- Poor – 6%
- Very Poor – 2%

**Outcome:** It is very positive feedback that 92% of respondents think the current green spaces are excellent, good or fair. With only 1 respondent thinking they are very poor.

5.2 Question - Are there any barriers preventing you from accessing the parks:

64% of respondents did not raise any accessibility issues, however muddy paths were raised as an issue.

5.3 Questions - What improvements would make green spaces more accessible and welcoming to you:

Most frequently suggested improvements were better maintained pathways & Improved accessible play areas. Unfortunately, elements were raised on street lighting, bus routes and cycling routes that are not within the jurisdiction of the Borough Council, but information will be shared with County Council for feedback purposes.

## 6. Consultation Section: Biodiversity and Climate Resilience

6.1 Question - How important is it to you that green spaces support biodiversity and climate change mitigation:

- Extremely Important – 80%
- Somewhat Important – 10%
- Neutral – 6%
- Somewhat unimportant – 4%

**Outcome:** 90% of people felt passionate about green spaces supporting biodiversity and climate change mitigation.

6.2 Question - What types of environmental improvements would you like to see (e.g. more trees, wildflower meadows, wildlife habitats):

100% of respondents included Trees, Wildlife habitats, and/or wildflower meadows as an improvement.

There were also 2 comments relating to improving ponds and protecting hedgerows.

6.3 Question - Would you support more naturalised areas even if it meant less frequent mowing or a “wilder” appearance:

- Yes – 46%
- Maybe – 28%
- No – 26%

## 7. Consultation Section: Strategic Direction & Priorities

7.1 Question - do you agree with the 5 strategic priorities outlined in the strategy:

- Yes 82%
- Some but not others 18%
- No 0%

7.2 Question – Would you like to give any further feedback on the strategic priorities of the strategy:

74% of responders did not give any further feedback on the priorities

Other comments were to further protect trees, and wildlife areas can look messy if left too wild.

7.3 Question – Which should be the top priority:

- Improving biodiversity – 34%
- Protecting Heritage – 26%
- Support health and wellbeing – 24%
- Enhancing Accessibility – 10%
- Community Engagement – 4%
- Not mutually exclusive – 1%

7.4 Question – How should the Council focus its resources:

- Focus on spreading resources across all green spaces, no matter the size, to ensure all are of a decent standard – 88%
- Focus resources on our bigger, most popular green spaces and parks to ensure they are of really high quality – 12%

**8. Consultation Section: Overall Feedback & Outcome**

8.1 All respondents deeply value the green spaces within the borough and want them protected, enhanced, and kept accessible. There is significant positive feedback on the current state of the green spaces but important to note that the priorities of the strategy are in line with the results of the consultation.

8.2 All responses were positive in relation to the 5 key priorities of the strategy, with increasing Bio-diversity, protecting the heritage and supporting health and wellbeing being overwhelmingly popular priorities.

8.3 In summary, the strongest messages from the consultation are:

- Protection of existing green spaces, trees, and hedgerows
- Investment in biodiversity and nature-friendly planting
- Improved accessibility for mobility users and older people
- Better maintenance, especially paths and play areas
- Equitable investment across all parks, not just major sites

8.4 General tone of the consultation is being supportive, and passionate of the green spaces and the strategy, respondents consistently emphasise that Green spaces are essential for health, wellbeing, wildlife, and community life, of which they agree the priorities of the strategy aim to achieve and are predominantly happy with.



# Green Spaces Strategy

## 2025 - 2035



**Oadby & Wigston**  
BOROUGH COUNCIL





## Our strategic objectives

### Our council

- To be the local voice of residents and businesses.
- To ensure that we provide high quality, value for money services that meet the needs of residents, businesses and visitors.
- To ensure high connectivity with residents and businesses.

### Our communities

- To provide a clean and safe place for everyone.
- To support any activities or actions that enhance the health and wellbeing of our Borough.
- To provide good, affordable and efficient housing for everyone.

### Our Economy

- To support economic growth that is focused on our town centres.
- To make our Borough an inviting place to visit.
- To help to provide good employment opportunities.

### Our environment

- To ensure that we are a carbon conscious Borough.
- To be seen to be 'Green'.

### Our partners

- To develop, maintain and enhance partnerships to help support delivery of our objectives.
- To ensure we are engaged and listening to all sections of the community.

# 'OUR BOROUGH - THE PLACE TO BE'

## Our vision



## Our purpose

Provide a sustainable council by listening, being engaged, and putting our customers first enabling us to focus on local needs and priorities.





... green spaces play  
fundamental roles  
in the provision of  
increased community  
cohesion, physical and  
mental health, and  
wellbeing.



Oadby and Wigston has a population of approximately 57,700 (census 2021) and covers an area of 9 square miles. The Borough is responsible for maintaining 26 areas of open spaces and parks which are treasured assets, central to the lives of their communities and enjoyed by visitors for many reasons. We are extremely proud of our green spaces and the value they bring to communities, including biodiversity, economic, education, heritage, health and wellbeing. In developing this strategy, we recognise these benefits and present clear priorities which will protect and enhance them in the future.

When we talk about our green spaces, we are referring to the sites which Oadby and Wigston Borough Council owns and manages, which also have free public access. These sites include formal parks, recreation grounds, playing fields, general open spaces, play areas, closed churchyards and cemeteries.



These green spaces play fundamental roles in the provision of increased community cohesion, physical and mental health, and wellbeing. We aim to ensure that these spaces will serve the communities of the future, as well as those of today. In doing so, we will provide opportunities that are sustainable, help improve biodiversity, contribute to climate change mitigation, encourage tourism, help grow the local economy, conserve the heritage and cultural offer in Oadby and Wigston and contribute to education.

Oadby and Wigston Borough Council also owns a site which is managed by the Leicestershire and Rutland Wildlife Trust (the Lucas Marsh Nature Area) which sits adjacent to the magnificent Brocks Hill Country Park, the new home of the Borough Council which comprises 67 acres of woodland and meadows.

Additionally, we recognise that a large amount of green space which is available to residents and visitors within the district is owned and managed by others – including The Leicestershire University Botanical Gardens at Oadby and the privately owned informal country park at Oadby Grange.

The Borough also benefits from the Grand Union Canal that passes through the Borough providing attractive vistas along the tow path particularly at Kilby Bridge and has good relationships with Leicestershire County Council, the Canals and Rivers Trust, community/ charity organisations and private land owners – and recognises that having a positive, open, and helpful collaboration with these organisations is the best way to achieve the aims set out within this strategy.





## Vision

Our green spaces will be vibrant, attractive, robust and actively maintained spaces for the whole community to enjoy.

They will be futureproofed to provide climate resilience and enhanced biodiversity while supporting the health and wellbeing of our communities.



## Key Strategic Priorities

1. Invest in green spaces as a priority, protecting our heritage.
2. Use resources effectively and sustainably, whilst maintaining and improving our amenities.
3. Contribute to climate change and biodiversity targets and aims, through planting trees and managing sites for wildlife whilst improving flora and fauna.
4. Increase the use and accessibility of green spaces for all, improving the health and wellbeing of our communities.
5. Work co-operatively with our communities and effectively with partners through positive community engagement.



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*Our green spaces have a major part to play in community and family life.*

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# Why have a Green Spaces Strategy?

Our green spaces have a major part to play in community and family life. They are places for us to socialise, enjoy being active, connect with nature and wildlife, relax and reflect. Some green spaces contain heritage features which tell a story about the past.

They can also play an important part in providing a more sustainable future, contributing towards climate change aspirations and providing educational opportunities.

It is also important to see our green spaces in the context of their ability to support and enhance our fauna and flora. The wide mix of sites offers a diverse range.

This Strategy will:

- Outline the approach for managing, protecting and developing green spaces which gives consideration to the Council's resources, management and maintenance responsibilities and the contributions from community and interest groups.
- Highlight a set of principles which will guide future maintenance, investment, community engagement decisions and actions regarding our green spaces.
- Agree a set of priorities which focus effort, resources and decision making, ensuring that our green spaces remain high quality spaces for everyone to enjoy.
- Help secure additional investment and external funding towards enhancing infrastructure, facilities and opportunities for the benefit of the community.







## Management Plan

Brocks Hill Country Park has a management plan which identifies local improvements which can be made and recognises the ongoing contribution of community groups and partners in delivering some of these actions with us.

Our remaining green spaces are extremely valuable assets, and each contributes to the broad benefits already highlighted. They play a significant part in community life and are extremely important to the people that use them.

Each of our green spaces will be managed and developed using the guiding principles within this strategy and the maintenance regimes that are specific to each site.

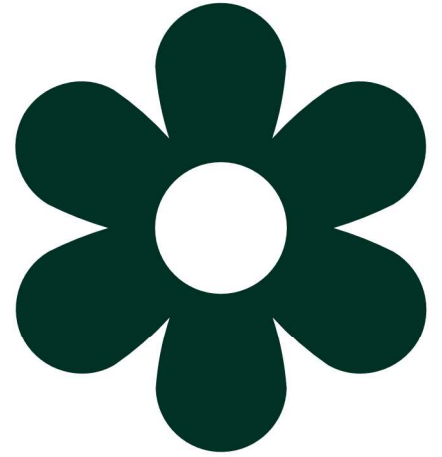
Our green spaces often contain natural features, have unique heritage value and, in some cases, play facilities for children. Whilst they may not always require detailed management plans, it is important to state that these are cherished assets for local communities and we are committed to improving these to ensure that they remain that way.

We want to ensure that all of our green spaces will stand up to future challenges. We therefore have a strong desire to improve biodiversity within these areas, manage the sites for the benefit of wildlife, provide more protection and shelter from the climate and reduce the impact of climate change.



## Guiding Principles

Guiding principles will be used when considering any changes that affect the current or future management and maintenance of our green spaces. These principles have been developed to ensure that any changes that are made to these spaces are appropriate, affordable, sustainable and deliver clearly against the aspirations of this strategy.



### These guiding principles are:

- Use key strategies and recognised evidence of good practice as a base to inform decision making so that any changes, improvements or projects are the right thing, in the right place and for the right reason.
- Ensure that any projects to protect or enhance our green spaces are in keeping and in proportion with the overall purpose and heritage of our sites and deliver against one of the priorities listed in this strategy.
- Any projects or improvements are developed with accessibility in mind, ensuring that wherever practical, our sites are accessible to all.
- Any new projects which have an impact on the ongoing maintenance of our sites are both affordable and financially sustainable.
- Any projects or improvements are developed with serious consideration as to how our green spaces will be used by our future generations, whilst looking to increase biodiversity and climate resilience.



# Objectives

We will:

1. review maintenance regimes to ensure that our green spaces are maintained to a high standard, in an affordable and sustainable way, and make improvements to increase enhance biodiversity. (Addresses priorities 1,2,3,4 & 5)

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2. ensure that infrastructure and heritage features are protected and well maintained, in accordance within the resources available to the Council. (Addresses priorities 1 & 2)

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3. encourage and enable positive physical and mental wellbeing by developing strong partnerships with community groups, sports clubs and other stakeholder groups. Ensuring that our green spaces fulfil their potential for enabling healthy lifestyles for all ages, encouraging all residents to move more. (Addresses priorities 1,2,4, &5)

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4. plant more trees within our green spaces to help combat climate change (carbon storage) and increase canopy cover, providing future new habitats for wildlife and additional shade for our communities in periods of extreme heat. (Addresses priorities 1,2,3,4 and 5)

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5. ensure our green spaces are safe, welcoming and accessible places for all of our communities and that the highest possible standards of health and safety are maintained by our service providers, event organisers and when engaging the community in projects. (Addresses priorities 2,4 and 5)

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6. actively encourage community engagement and involvement in the protection, maintenance, development and positive environmental impacts of our green spaces. (Addresses priorities 1,2,3,4 and 5)

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7. effectively manage internal budgets and attract external funding wherever possible towards the ongoing maintenance and the future development of our green spaces. (Addresses priorities 1,2,3,4 and 5)

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8. review the Brocks Hill management plan annually to ensure objectives are being delivered effectively. (Addresses priorities 1,2,3,4 and 5)

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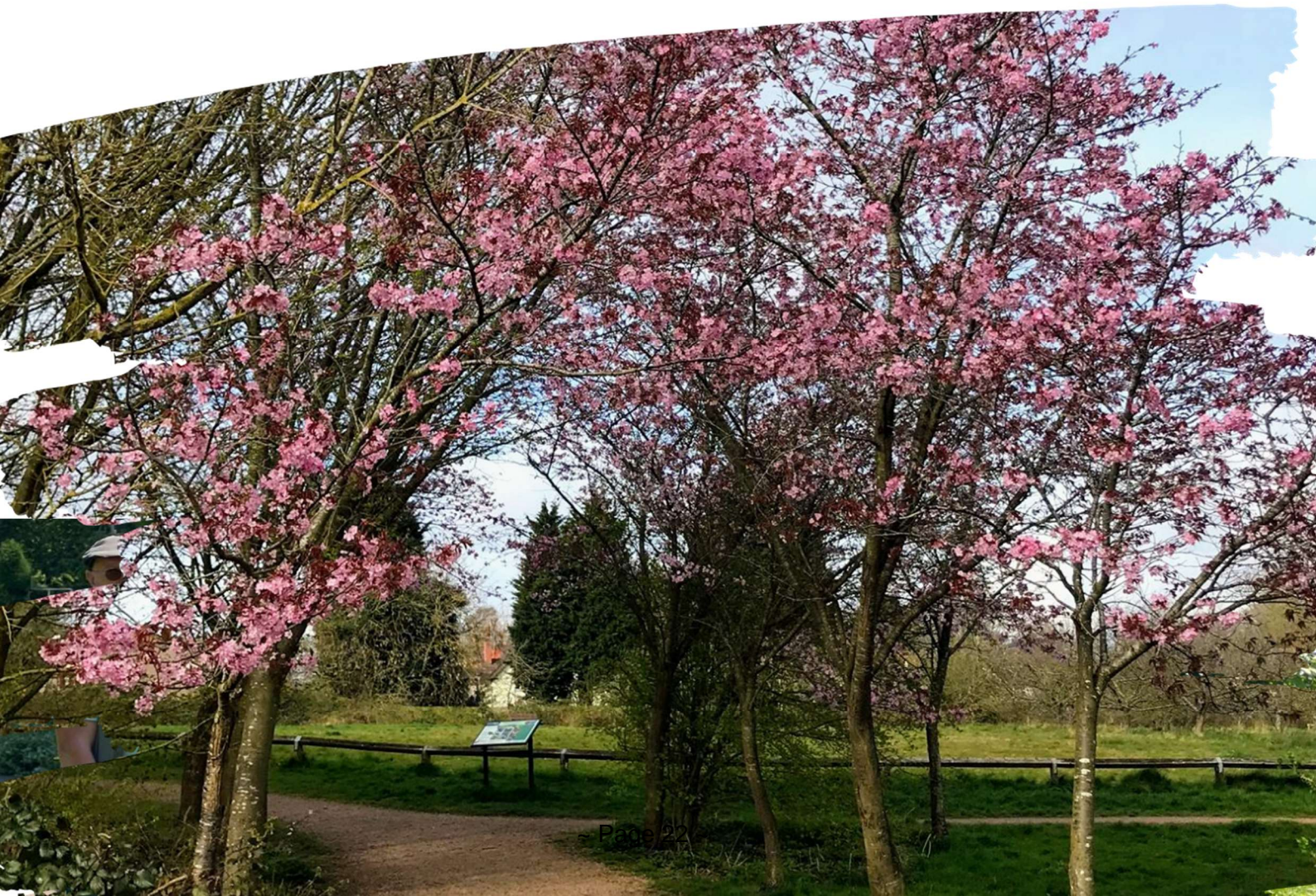

## Strategic Context

For this strategy to focus on the future effectively, it is important that it is set within the framework of the key influencing documents and evidence base which frame the provision, protection and development of our green spaces.

It is equally important to understand the current context in which our green spaces are managed and maintained as this will play a part in decision making and the delivery of future projects. (Full details of the documents can be found in Appendix 1).

## Key Strategies and Documents

- Corporate Plan (2023- 2027)
- Oadby & Wigston Borough Local Plan (2011-2031)
- Climate Change Strategy (2024)
- Oadby & Wigston Tree Strategy (2019)
- Volunteering Policy 2022
- Sport England: Uniting the Movement (2021 – 2031)





## Community Involvement

We are committed to working with local organisations who may wish to manage and maintain some of the smaller land assets within their locality, which are owned and currently maintained by Oadby and Wigston Borough Council. With community support, financial backing and agreed plans in place, these local green spaces may be better suited to local management. We want to encourage dialogue between a range of local organisations such as community groups and charitable foundations that will lead to the management model that best serves the local community.



We also see the important role our parks and open spaces can have on our communities across Oadby and Wigston. We will therefore ensure that our communities are able to help decide how their local spaces are managed and have the opportunity to contribute to their upkeep and future development.



*Wherever  
practical, our  
sites are  
accessible to all*





# Management Responsibilities

Oadby and Wigston Borough Council is responsible for the overall management of the sites listed in Appendix 2 as well as many more incidental parcels of land. In addition to having the overall management responsibility, we work proactively with service providers, partners, the community and interest groups to develop and deliver projects that protect, maintain, or improve our green spaces.

The Corporate Assets team is responsible for maintaining each of the Council's green spaces across the district. Maintenance Schedules or action plans detail an agreed schedule of maintenance standards undertaken in each area.

The Corporate Assets team supports community groups such as Pride of the Borough to deliver agreed projects that help protect and enhance green spaces for the benefit of the community.

Community groups, including Friends of Peace Memorial Park are a vital and valued support network who play an important role in assisting the Council in undertaking specific maintenance tasks and development projects. These groups are also viewed by the Council as a way for the community to bring forward ideas, energy and act as a mechanism to attract additional funding to protect, maintain and enhance the green spaces.







**Oadby & Wigston**  
BOROUGH COUNCIL

*We aim to  
encourage  
and enable  
positive  
physical and  
mental  
wellbeing.*



# Appendix 2



## EQUALITY ASSESSMENT

### PART 1 - INITIAL SCREENING

<b>Name of Policy/Function:</b>		This is <b>new</b>
<b>Green Spaces Strategy 2025-35</b>		

<b>Date of screening</b>	2 <sup>nd</sup> September 2025
--------------------------	--------------------------------

#### 1. Briefly describe its aims & objectives

The Green Spaces Strategy draws together our ambitions for the management of parks and open spaces within Oadby and Wigston. The strategy has been developed to reflect the work of our officer team, partner organisations, community groups and councillors who each play a role in maintaining and improving the borough.

The strategy will be used as a framework to prioritise how we manage our parks and green spaces now and, in the future, to ensure they serve the needs of our communities.

(We are referring to the sites which Oadby & Wigston Borough Council owns and manages, which also have free public access. These sites include formal parks, recreation grounds, playing fields, general open spaces, play areas , closed churchyards and cemeteries. )

#### 2. Are there external considerations?

*e.g. Legislation/government directive etc*

Contribute to climate change and biodiversity targets and aims, through planting trees and managing sites for wildlife whilst improving flora and fauna.

#### 3. Who are the stakeholders and what are their interests?

Working in partnership is a key element of the strategy, the partners we will be working with include:-  
Pride of the Borough  
Friends of Peace Memorial Park  
Ministry of Justice  
Volunteers

#### 4. What outcomes do we want to achieve and for whom?

Our parks and green spaces are open to all. They play a fundamental role in the provision of increased community cohesion, physical and mental health and wellbeing.

Key Strategic Priorities:-

- Invest in green spaces as a priority, protecting our heritage.
- Use resources effectively and sustainably, whilst maintaining and improving our amenities.
- Contribute to climate change and biodiversity targets and aims, through planting trees and managing sites for wildlife whilst improving flora and fauna.
- Increase the use and accessibility of green spaces for all, improving the health and wellbeing of our communities.
- Work co-operatively with our communities and effectively with partners through positive community engagement.

#### 5. Has any consultation/research been carried out?

In terms of any major changes to our parks, recreation grounds, playing fields, of cemeteries we will undertake a consultation with local residents and key stakeholders.

#### 6. Are there any concerns at this stage which indicate the possibility of Inequalities/negative impacts?

*Consider and identify any evidence you have -equality data relating to usage and satisfaction levels, complaints, comments, research, outcomes of review, issues raised at previous consultations, known inequalities) If so please provide details.*

None

#### 7. Could a particular group be affected differently in either a negative or positive way?

**Positive** – *It could benefit*

**Negative** – *It could disadvantage*

**Neutral** – *Neither positive nor negative impact or not sure.*

	Type of impact, reason & any evidence
Disability	Positive
Race (including Gypsy & Traveller)	Neutral
Age	Neutral
Gender Reassignment	Neutral

<b>Sex</b>	Neutral
<b>Sexual Orientation</b>	Neutral
<b>Religion/Belief</b>	Neutral
<b>Marriage and Civil Partnership</b>	Neutral
<b>Pregnancy and Maternity</b>	Neutral

**8. Could other socio-economic groups be affected?**

*e.g. carers, ex-offenders, low incomes, homeless?*

Yes, they could but only in a positive way, we would encourage all our residents to use our parks and green open spaces and let all groups know of any events that are happening.

**9. Are there any human rights implications?**

*No (If yes, please explain)*

**10. Is there an opportunity to promote equality and/or good community relations?**

*Yes (If yes, how will this be done?)*

We have been working with a disabled parent's group to review the play equipment that we have our parks. Where a piece of equipment needs replacing or we have funding to put in new equipment then we will consult with them on the needs of disabled children so we can maximise access for all to the play equipment.

**11. If you have indicated a negative impact for any group is that impact legal?**

*i.e. not discriminatory under anti-discrimination legislation*

N/A

**12. Is any part of this policy/service to be carried out wholly or partly by contractors?**

Where we are replacing or installing new equipment on our parks then we will use contractors, we will ensure that the service they provide is inclusive of all.

**13. Is a Part 2 full Equality Assessment required?**

No



**14. Date by which a Part 2 full Equality Assessment is to be completed with actions.**

N/A

**Please note that you should proceed to a Part 2, the full Equality Impact Assessment if you have identified actual, or the potential to cause, adverse impact or discrimination against different groups in the community.**

We are satisfied that an initial screening has been carried out and a full equality assessment **is not required\*** (please delete as appropriate).

Completed by: Teresa Neal

Date: 2<sup>nd</sup> September 2025

Countersigned by:

Date: 2<sup>nd</sup> September 2025

Screened by:



Mark Smith

Date: 2<sup>nd</sup> September 2025

Please forward an electronic copy to our Equalities Lead [mark.smith@oadby-wigston.gov.uk](mailto:mark.smith@oadby-wigston.gov.uk)

Equality Assessments shall be published on the Council website with the relevant and appropriate document upon which the equality assessment has been undertaken.

# Agenda Item 8



**Policy, Finance and  
Development  
Committee**

**Tuesday, 03 February  
2026**

**Matter for  
Information and  
Decision**

**Report Title: Cemetery and Burial Strategy (2026 - 2036)**

**Report Author(s): Ben Wilson (Head of Neighbourhood Services)**

<b>Purpose of Report:</b>	To inform Members of the outcome of the consultation and to adopt the proposed Cemetery and Burial Strategy.
<b>Report Summary:</b>	The report sets out the Council's approach to the provision of burial services over the next 10 years.
<b>Recommendation(s):</b>	<b>A. That the content of the report appendices and consultation responses be noted; and B. That Committee adopts the Cemetery and Burial Strategy (at Appendix 1).</b>
<b>Senior Leadership, Head of Service, Manager, Officer and Other Contact(s):</b>	Ben Wilson (Head of Neighbourhood Services) (0116) 257 2711 <a href="mailto:ben.wilson@oadby-wigston.gov.uk">ben.wilson@oadby-wigston.gov.uk</a>  Teresa Neal (Strategic Director) (0116) 257 2626 <a href="mailto:teresa.neal@oadby-wigston.gov.uk">teresa.neal@oadby-wigston.gov.uk</a>
<b>Strategic Objectives:</b>	Our Council (SO1) Our Communities (SO2) Our Partners (SO5)
<b>Vision and Values:</b>	Customer & Community Focused (V1)
<b>Report Implications:-</b>	
Legal:	There are no implications arising from this report.
Financial:	There are no implications arising from this report.
Corporate Risk Management:	Reputation Damage (CR4) Effective Utilisation of Assets / Buildings (CR5)
Equalities and Equalities Assessment (EA):	There are no implications directly arising from this report. Initial EA Screening (See Appendices)
Human Rights:	There are no implications arising from this report.
Health and Safety:	There are no implications arising from this report.
<b>Statutory Officers' Comments:-</b>	
Head of Paid Service:	The report is satisfactory.
Chief Finance Officer:	The report is satisfactory.

<b>Monitoring Officer:</b>	The report is satisfactory.
<b>Consultees:</b>	None.
<b>Background Papers:</b>	None.
<b>Appendices:</b>	<ol style="list-style-type: none"> <li><b>1.</b> Cemetery and Burial Strategy (2026 - 2036)</li> <li><b>2.</b> Cemetery Rules and Regulations (September 2025)</li> <li><b>3.</b> Memorial Safety Policy</li> <li><b>4.</b> Equalities Impact Assessment</li> </ol>

## **1. Introduction and Background**

- 1.1 Oadby and Wigston Borough Council has not previously had a formalised Cemetery and Burial Strategy. The benefit of the strategy is that it not only outlines the aims and ambitions relating to the maintenance and improvement of burial grounds but, provides an opportunity to look at the broader long-term possibilities.
- 1.2 The ethos and aims of the strategy are based on an understanding of best practice, and with consideration to the opinion and responses of the consultation.

## **2. Issues, Options and Analysis of Options**

- 2.1 Adoption of the strategy and the associated policies /procedures will address the fact that there is currently no Cemetery strategy in place and set out our ambitions for cemeteries and burials for the next ten years. We also want to ensure that policies relating to burials and memorials are clear, well communicated, and consistent. Providing a framework which enables the service to effectively manage our cemeteries and provide future focus.
- 2.2 A strategy that provides a clear direction of travel and guidelines for current management, helps to ensure that burial grounds are maintained and developed well. It also ensures consistency and provides an opportunity for strategic aims to be explored.
- 2.3 The aim is to provide cemeteries for Oadby and Wigston residents that are beautiful, peaceful and well used and to offer burial spaces that support a diverse range of cultural and individual needs. To ensure that our policies relating to burials and memorials are clear, well communicated, and consistent and to ensure that procedures for the purchase and use of burial sites and memorials are clear, efficient, and compassionate.

## **3 Overall Consultation & Response Information**

- 3.1 At the Policy, Finance and Development Committee held on the 9 September 2025, Members approved for the strategy to go out for consultation.
- 3.2 The consultation was open from December 2025 to February 2026 and a supplementary report will follow once the consultation closes and prior to the Policy, Finance & Development Committee (on 3 February 2026).

# **Oadby & Wigston Borough Council Cemetery and Burial Strategy**

**2026 to 2035**

# Introduction



Cemeteries are important spaces. In developing this strategy Oadby and Wigston Borough Council (the Council) are keen to ensure that we share the aims and ambitions for Cemeteries and Burials for the next ten years. We also want to ensure that policies relating to burials and memorials are clear, well communicated, and consistent.

Our vision is to ensure that all cemeteries in the Borough are maintained to a standard that reflects the respect due to those buried there. That the valuable green space created by burial grounds are pleasant quiet environments that can be used for remembrance, relaxation and reflection. It is also important that the Council's burial grounds reflect and support the diversity of the Borough, creating spaces for all faiths.

The Council manages 2 cemeteries and 3 closed church yards. In addition to ensuring the beauty of the sites, burials in Oadby and Wigston need to be sustainable. We need to ensure that we have sufficient capacity to accommodate the needs of residents.

## Aims and Ambitions

The following are the key aims of the service. These are focused on ensuring clarity of process, quality of environment and inclusivity.

1. To provide cemeteries for Oadby and Wigston residents that are beautiful, peaceful and well used
2. To offer burial spaces that support a diverse range of cultural and individual needs
3. To ensure that our policies relating to burials and memorials are clear, well communicated, and consistent
4. To ensure that procedures for the purchase and use of burial sites and memorials are clear, efficient, and compassionate



Future ambitions for the Council are:

- To improve levels of accessibility for all cemeteries and the closed church yards managed by the Council
- To assess the use and condition of the chapels that are located within our burial sites and ensure that they are maintained appropriately.

## Consultation

Engagement with and feedback from stakeholders including residents and communities is important in ensuring that the Cemeteries and burials grounds in Oadby and Wigston meet the needs of communities. To this end a public consultation will be undertaken commencing in Winter 2025 for 8 weeks before the Strategy is adopted.

In addition to engagement with residents, we will consult with Undertakers and memorial masons within the Borough. The close communication with those organisations helps to ensure that burials proceed as efficiently and smoothly as possible.

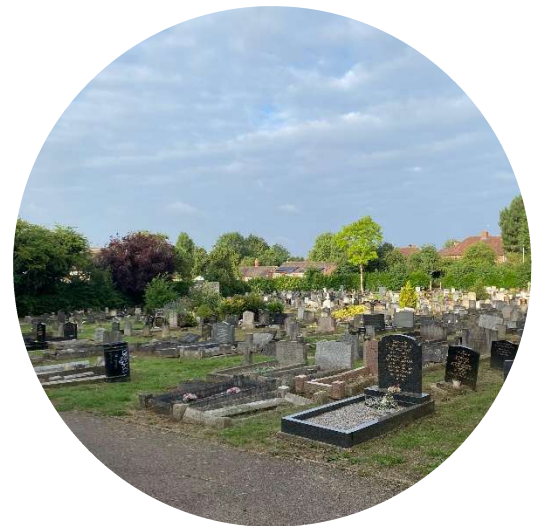
## Legislative Framework

Whilst the views and requirements of communities and those using the burial grounds is very important. The policies and procedures that are in place relating to burials and memorials are required to be compliant with legislation.

There is currently no statutory duty for Local Authorities to provide burial spaces for residents, however, it is a requirement that existing burial grounds are well maintained.

The key legislation that applies to Burials and Burial grounds includes:

- The Local Government Act (1972)
- The Local Authorities Cemeteries Order (1977)
- The Public Health Act (1857)
- Ecclesiastical Laws
- The Burial Act (1857)
- National Planning Policy



Included in the legislation is a requirement that the Council provide Public Health Burials for those deceased who do not have relatives or where relatives have not been able to be traced.

The legislation also requires that headstones within burials grounds are assessed for safety through routine inspections. Those memorial stones found to be unsafe are required to be laid down to avoid risk of injury or damage.

## Capacity

Wigston Cemetery has capacity to accept the current level of burials for approximately 10 years should demand remain stable. This is based on the current trend that shows a reduction in interments as more people prefer cremation.

Currently the Council offers a provision for burials & Interments to all faiths, community groups and the public.



In the longer term if the Council wishes to continue to provide burial provision within the Borough it will need to review how it operates the cemeteries and consider whether the re-use of graves would be a matter that it would consider (Subject to the Secretary Of State's approval) or identify additional land to either extend the cemeteries or create new cemeteries.



## Policies

To ensure compliance with the legal framework as well as to ensure that Oadby and Wigston Cemeteries are maintained to a high standard and accessible for all, specific policies relating to Burials and Memorials have been developed. The table below provides a summary of those policies with the full documents included as appendices to this strategy.

The Burials and Memorials policies will be reviewed once the review of the current operation of the cemeteries has been concluded.

### Policy Reviews

<b>Potential Future Re-use of Graves/ Cemetery Extensions / New cemeteries</b>	1	Review the current operation of the cemeteries and the impact arising from the provision of plots for all faiths.
<b>Oadby and Wigston Cemetery Regulations</b>	2	Overview of all aspects of Cemetery and Burial Management including, but not limited to: <ul style="list-style-type: none"> <li>• Sites</li> <li>• Opening hours</li> <li>• Plot and Section types</li> <li>• Maintenance regimes</li> <li>• Purchasing of burial plots</li> <li>• Installation of memorials</li> </ul>
<b>Memorial safety policies and procedures</b>	3	Guidelines regarding safety testing and permitted memorials within different sections of cemeteries

## Oadby & Wigston Borough Council

# Cemetery Rules and Regulations

September 2025

<b>Committee Approval</b>	PFD 9 Sept 2025
<b>Policy Owner</b>	Corporate Asset Manager
<b>Review Date</b>	April 2028





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## **2. Burial Authority**

## **3. Our Cemeteries**

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- 5.2. Public graves

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- 8.1. Application to install a memorial
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- 8.3. Inscriptions
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- 8.6. Memorial safety
- 8.7. Memorial trees and seats
- 8.8. Items placed on graves

## **9. Exhumations**

## **10. Cemetery Records**

## 1 Cemetery Rules and Regulations

All Local Authority managed cemeteries are subject to standards and conditions known as Cemetery Rules and Regulations. The Rules and Regulations are designed to inform all cemetery users of the aspects of the management of the cemeteries and the requirements applicable to them.

These Rules and Regulations should be read in conjunction with the statutory requirements contained within the Local Government Act 1972 and the Local Authorities Cemeteries Order 1977 (as amended) together with any other relevant legislation that governs this service.

If you need help in interpreting the Rules and Regulations please contact the Cemeteries Office.

The Council reserves the right to alter, add to, or amend the Cemetery Rules and Regulations from time to time as necessary.

## 2 Burial Authority

The Burial Authority is Oadby and Wigston Borough Council, located at Brocks Hill Council Offices, Washbrook Lane, Oadby, Leicester LE2 5JJ

Postal enquiries	Cemeteries Office Brocks Hill Council Offices  Washbrook Lane Oadby Leicester LE2 5JJ
Telephone Enquiries	Telephone Leicester (0116) 288 8961
Email enquiries	cemetery@oadby-wigston.gov.uk
Web site	<a href="http://www.oadby-wigston.gov.uk">www.oadby-wigston.gov.uk</a>

Burial Law (Local Authorities Cemetery Order 1977) states that none of the following can take place without the written permission of the Burial Authority (Council):

- Burials
- Interment of ashes;
- Scattering of ashes;
- Exhumations;
- Installation or fixing of a memorial, kerb edges, trees, plants, seats or benches;
- Adding an inscription to a memorial;
- Renovation of a memorial;
- Removal and /or replacement of a memorial;
- Building of walled graves or vaults.

## 3 Our Cemeteries

The cemeteries to which these Rules and Regulations apply are located at:

- Oadby Cemetery, Wigston Road, Oadby, Leicester LE2 5QB (including Oadby Cemetery Extension off Goddard's Slang)

- Wigston Cemetery, Welford Road, Wigston, Leicestershire LE18 3TE

### **3.1 Opening hours**

Our cemeteries are open to visitors every day including weekends and public holidays.

Burial times are from 9:30 a.m. to 3:45 p.m. Monday to Thursday (last appointment 3.15 p.m.) and 9:30 a.m. to 2:30 p.m. on Friday (last appointment 2.00 p.m.), unless by prior agreement with the Council, in which case extra fees are payable as laid down in the Scale of Charges in respect of irregular hours. The time stated in the Notice of Interment is the time the cortege must be at the cemetery.

Oadby and Wigston Borough Council has the right to close the cemeteries at any time without prior notice.

### **3.2 Cemetery sections**

Both cemeteries have sections available for

- Full burial (over 12 years of age);
- Children's sections (full burial up to and including 12 years of age);
- Interment of cremated remains (known as Garden of Remembrance or 'G of R');
- Scattering of ashes.

### **3.3 Sexton**

The Council employs a Sexton who is responsible for maintenance of the cemetery grounds and all grave excavations and interments in both Wigston and Oadby Cemeteries. The Sexton has full authority to implement, enforce and advise on the Cemetery Rules and Regulations on behalf of the Council.

### **3.4 Conduct in cemeteries**

All visitors should enter and exit the cemeteries using the main entrances and pedestrian gates only.

The Council reserves the right to refuse access to a cemetery if anyone is intoxicated or showing signs of drug abuse that could lead them to cause a public nuisance or disorder.

No person is to display any printed paper, notice or sign, or canvass, promote or sell their services to visitors in either cemetery without the written authorisation of the Council.

Under Article 18 of the Local Authorities Cemeteries Order 1977, it is an offence for anyone to:

- wilfully create any disturbance in a cemetery;
- commit any nuisance in a cemetery;
- interfere with any burial taking place in a cemetery;
- interfere with any grave or vault, any tombstone or other memorial, or any flowers or plants in any such manner;
- play any game or sport in a cemetery;
- enter or remain in a cemetery when it is closed to the public, unless authorised by the Council to do so.

Any person who contravenes the above shall be liable, on summary conviction, to a fine as laid out in Article 19 of the Local Authorities Cemeteries Order 1977.

In addition, it is an offence under the Criminal Damage Act 1971 to destroy or damage any property (including statues, monuments, memorials, railings or fences) belonging to another within the cemeteries.

### **3.5 Vehicles in the cemeteries**

The Council shall not accept any liability for loss or damage to any vehicle parked in the cemetery or the cemetery car parks. All vehicles are parked at the owner's risk.

- **Wigston Cemetery:**

Parking is available along the cemetery entrance road or in the lay-by outside of the cemetery, directly off the A5199.

All vehicles should be neatly parked to allow access for funeral or other vehicles.

Visitors are not permitted to drive on the footpaths, grass or over any planted areas under any circumstances. Such action will be deemed a nuisance and will be dealt with under the powers of the Local Authorities Cemeteries Order Articles 18 and 19 as cited above.

- **Oadby Cemetery:**

There is no provision for visitors to enter the cemetery by car.

Parking is provided on Goddard's Slang and limited provision is available off Chapel Street.

### **3.6 Dogs in the cemeteries**

Dogs are permitted in the cemeteries but must be kept on a short lead. If a dog fouls, the owner must clean up any dog faeces and dispose of it in a litter or dog bin away from the site. Failure to clean up after your dog may result in a fine or prosecution.

### **3.7 Maintenance of grounds**

Maintenance of the grounds (e.g. grass cutting, spraying, leaf and litter clearing, upkeep of trees, shrubs, flower beds and hedges) will be carried out by the Council at a frequency determined by the Council. The Council has the right to prune, cut down or remove any shrub, tree, plant or flowers that has become unsightly, overgrown or dangerous and to spray around graves in any area of the cemeteries.

The Council reserves the right to disconnect the water supply, without notice, if required.

The Council reserves the right to place soil or any other material onto a grave space in the cemetery (whether occupied or not) when carrying out maintenance works. Any soil or material placed will be removed and the area re-instated as soon as possible after the work has taken place.

### **3.8 Removal of floral arrangements and other items from graves**

The Council has the right to remove items from graves which

- have perished;
- pose a hazard;
- encroach on an adjacent grave space;
- have not been authorised

and dispose of such items without prior reference to the Deed Holder. This includes flowers, wreaths, weeds, plants, rubbish, fencing, artificial grass, stone chippings, border edging, glass objects, other decorations and unauthorised items placed on a grave (for further information see section on Memorials).

The Council has the right to remove any trees or shrub on a grave that has exceeded 2' 6" (750 mm) in height.

Christmas wreaths are removed by Council staff after the Christmas period, normally in February/March.

## **4 Fees and Payment**

All fees and charges applicable to the cemetery are set out in the Councils' published Scale of Charges which is reviewed annually.

All fees must be received by the Cemeteries Office before the work to which they relate is started. Fees for burials must be received, along with the Notice of Interment, a minimum of 48 hours (two working days) before the burial is due to take place and 24 hours (one working day) for interment of cremated remains.

Where payment is made by cheque, the cheque should be payable to 'Oadby & Wigston Borough Council'.

## **5 Purchasing a grave**

Requests to purchase a grave should be made through the Cemeteries Office. This can be done at the time a funeral is arranged or, (at Wigston Cemetery only), by purchasing a grave in advance. Purchase in advance is limited to a maximum of two plots per applicant.

Purchase in advance is not available at Oadby Cemetery.

### **5.1 Grant of Exclusive Right of Burial**

After a grave is purchased the Council will issue a Grant of Exclusive Right of Burial (the Deed) to the purchaser.

The Grant of Exclusive Right of Burial is a legal document. It does not give ownership of the actual land but allows the Deed Holder to:

- be interred into the grave if space is available (including cremated remains);
- authorise further interments into the grave where space is available;
- place an inscribed memorial onto the grave subject to the Councils' regulations on memorials;
- give permission for additional inscription(s) to be made onto an existing memorial subject to the Councils regulations on memorials.

The Deed should be produced to the Council when a request is made to re-open the grave. The Council reserves the right to refuse to allow an interment into a grave space where the Deed is not produced.

The Deed is granted for 100 years. When the Deed expires the ownership of the grave will revert back to the Council unless the family wishes to extend the Deed for a further

period. A fee is payable to the Council for extending a Deed by a further 50 years as laid down in the Councils' Scale of Charges.

The Deed Holder may transfer the Grant of Exclusive Right of Burial during their lifetime to another individual on completion of an Assignment Form and payment of the required fee.

Where a Deed Holder is deceased and other family members wish to arrange a further interment into the grave space (or install a memorial or add an inscription onto an existing memorial) the Grant of Exclusive Right of Burial will need to be transferred by completion of a Form of Assent before the grave can be further re-opened (or any memorial erected onto the grave or any existing memorial repaired, altered or removed). Further advice on how this may be possible can be obtained from the Cemeteries Office. Depending on individual circumstances, the transfer may require the consent of other family members. If the relevant consents are withheld the ownership cannot be transferred and no further interments will be allowed. Only the next of kin reaching an agreement between themselves can resolve this.

Possession of the Deed does not, in itself, signify ownership of the grave.

## **5.2 Public graves**

A public grave is an unpurchased grave where no Exclusive Right of Burial exists. There is usually no family connection with those buried in this type of grave. No memorial rights exist for a public grave, therefore no headstone or memorial can be placed on it without the consent of the Council.

## **6 Arranging an interment**

All arrangements for an interment or scattering of cremated remains must be made through the Cemeteries Office.

### **6.1 Notice of Interment**

Interment requests must be made on the official 'Notice of Interment' form supplied by the Council. The forms are available by request or can be downloaded from the Councils' web site at [www.oadby-wigston.gov.uk](http://www.oadby-wigston.gov.uk). The details provided on the form must be clear and complete. In the case of a second interment the Notice of Interment should be signed by the Deed Holder (except where the deceased is the Deed Holder) and the Deed produced.

The Notice of Interment and payment must be received by the Council not less than 48 hours (two working days) prior to the time the burial is due to take place or 24 hours (one working day) in the case of interment of cremated remains. Interments at shorter notice, will, if possible, be arranged in exceptional circumstances or for religious requirements. The Council reserves the right to charge additional fees for interments arranged at short notice as laid down in its Scale of Charges.

The Council reserves the right to delay or cancel any interment where, in its opinion, ownership of the Grant of Exclusive Right of Burial is disputed.

Coffin sizes should be detailed on the Notice of Interment. If these are not known at the time of giving notice they may be supplied later in writing to the Cemeteries Office. The Council shall not accept liability for any coffin sizes given other than in writing.

Interments can take place on any weekday (other than a public holiday) between

- 9:30 a.m. and 3.15 p.m. Monday to Thursday;
- 9:30 a.m. and 2.00 p.m. Friday.

Interments outside of the above hours may be available by special arrangement with the Council and will incur extra fees as laid down in the Scale of Charges in respect of irregular hours.

The time stated in the Notice of Interment is the time the funeral cortege must be at the cemetery.

## **6.2 Arrival at the cemetery**

Punctuality at the cemetery should be observed to prevent inconvenience or one funeral running into another. Prior notice should be given to the Cemeteries Office for any extra ordinary funeral processions, for example, the use of a horse drawn hearse, a military funeral etc.

A funeral arriving before the time appointed may have to wait until the time arranged.

A funeral arriving after the appointed time must act under the direction of the Sexton as to when the burial may proceed. If a funeral arrives late the Council reserves the right to charge an additional fee as laid down in the Councils' Scale of Charges.

The funeral director or person arranging the funeral is responsible for providing sufficient bearers to transfer the coffin from the hearse to the graveside.

## **6.3 Disposal Certificate requirements**

No interment or scattering of ashes can take place unless the Council has first received the appropriate certification. This is:

- A 'Certificate of Disposal' issued by the Registrar of Births and Deaths, or
- An 'Order for Burial' issued by the Coroner, or
- A 'Certificate of Cremation' issued by the crematorium

This documentation must be supplied to the Cemeteries Office prior to the interment or may be handed to the Sexton at the cemetery before the interment or scattering can take place. Failure to provide the necessary documentation may result in the delay of the interment or scattering until the appropriate certification can be produced.

## **6.4 Religious ceremony**

A burial can take place with or without a religious service or ceremony. It is the responsibility of the bereaved family or funeral director to arrange for a Minister, Clergy or other authorised person to officiate at the burial. Any authorised person may officiate at an interment providing the ceremony is conducted with decorum.

There is a chapel available at Wigston Cemetery which may be hired for a service or ceremony to take place. This can be booked through the Cemeteries Office at the time of making funeral arrangements. Hire charges are as laid down in the Councils' Scale of Charges.



## **6.5 Alterations to funeral arrangements**

When a Notice of Interment has been accepted no alteration will be permitted except in regard of the time of burial. In this case written notice must be provided no later than one working day (24 hours) before the interment is due to take place.

The Council will not be responsible for any misunderstandings which may arise as a result of a telephone instruction only. Any requests or information (such as coffin sizes) given over the telephone must be immediately confirmed in writing.

Any additional expense incurred by the Council as a result of incorrect information having been supplied will be charged to the person making the application.

## **6.6 Scattering of ashes**

There is an area in each cemetery designated for the scattering of ashes. Alternatively, ashes may be scattered under the soil of a full burial plot or cremated remains plot so long as permission is given by the Deed Holder. In either case, application should be made to the Council and the correct fees paid before any scattering takes place.

## **7 Graves**

Interments will only be allowed in designated areas previously laid out for burial or interment of cremated remains. These areas are identified on the cemetery plans held by the Cemeteries Office.

The Council reserves the right to retain any grave spaces for its own purposes.

### **7.1 Allocation of graves**

When purchasing a grave, whether at the time of death or purchasing in advance, a person will be allocated the next grave space 'following on' from the previous interment as shown on the cemetery plans. However, every effort will be made to accommodate family wishes where this is possible.

### **7.2 Excavations**

All grave spaces are excavated by trained cemetery personnel and the method of excavation will take into account location, access and health and safety. No grave shall be dug or excavated by any other person unless appointed by the Council.

The Council has the right, without giving notice, to place soil or other material excavated from a newly dug grave temporarily onto the grave space(s) adjoining the grave being excavated whether or not the adjoining grave space(s) are purchased and/or occupied. Adjacent graves will be fully re-instated to their original appearance once the interment has taken place and the area will be left tidy.

When a grave is re-opened for the purposes of making a further burial no person shall disturb any human remains previously interred. Any ash caskets interred into a burial plot will be positioned in such a way and of sufficient depth to ensure they are not disturbed in any way should the grave be re-opened in future.



Where a temporary wooden cross is placed on a new grave, the Council has the right to remove the cross if it deteriorates to a poor condition or when a memorial is erected on the grave.

### **7.3 Size and depth of graves**

Subject to the discretion of the Council all graves will be of such depth to accommodate:

- Burial sections - up to two coffins and up to six ash caskets
- Gardens of Remembrance – up to two ash caskets
- Children's Sections – one coffin

The Council reserves the right to alter this standard as required.

No body will be buried in a grave in such a way that any part of the coffin is less than 3 feet (900 mm) below the level of any ground adjoining unless the Council consider the soil to be of suitable character, in which case, a coffin made of perishable materials may be placed not less than 2 feet (600 mm) below the level of the ground adjoining the grave.

When more than one body is interred in any one grave a layer of earth not less than 6" (150 mm) thick shall be left undisturbed above the previously buried coffin except that this regulation may not apply in cases where two interments take place at the same time.

Graves will be of a sufficient size to admit coffins or caskets to the dimensions specified on the Notice of Interment form submitted by the Funeral Director or the person arranging the funeral. If the grave has to be enlarged, the Council may make an extra charge.

For any oversized grave, the Council has the right to charge for two grave spaces.

### **7.4 Re-instatement**

Unless written instructions are received by the Council when the Notice of Interment is given, and any additional fee paid as laid down in the Scale of Charges, following the burial taking place, the grave will be filled in and, when the ground has settled, turfed over or seeded so that the level of the top of the grave corresponds with the level of the surface of the burial ground prior to the first interment.

Requests for personal involvement during the backfilling process will be considered upon request and should be notified to the Council prior to the burial taking place. Any personal involvement agreed to will be undertaken under the supervision of the Sexton.

After an interment has taken place the soil will continue to settle for approximately 9 - 12 months, or longer, depending on the soil conditions. The Deed Holder may plant up the grave area during this time. Where graves have not been planted or, where it is the opinion of the Council that the Deed Holder has not maintained the grave for over 12 months, the Council may turf over or seed the grave at the Sexton's discretion.

Graves can also settle unexpectedly during adverse weather and if this happens arrangements will be made to level the grave as soon as possible.

### **7.5 Walled graves or vaults**

Where the Deed Holder wishes the interment to take place in a walled grave or vault an application must be made to the Council in writing and no work take place until written

authority has been given. The Council does not undertake the work to build the grave or vault and it is the responsibility of the Deed Holder to appoint a suitably qualified person to carry out the work to the satisfaction of the Council at the expense of the Deed Holder before the interment can take place.

A fee is payable to the Council for permission to undertake this work.

Details of the construction of walled graves and vaults are given in the Local Authorities Cemeteries Order. Further guidance and information should be sought from the Cemeteries Office.

## **8 Memorials**

Once the grave has settled the Deed Holder may apply to the Council to install a memorial onto the grave in areas where this is permitted.

Memorials are only allowed on purchased graves.

### **8.1 Application to install a memorial**

Only stonemasons that have been approved by the National Association of Memorial Masons (NAMM) or British Register of Accredited Memorial Masons (BRAMM) will be permitted to install or undertake fixing work on memorials within the Council's cemeteries. The stonemason will be required to supply to the Cemeteries Office a copy of their NAMM or BRAMM certification, together with evidence of their Public Liability Insurance for a minimum value of £5 million, before any permission will be issued by the Council.

All memorials or kerb edges of any kind, including inscriptions, are subject to the approval of the Council. An 'Application to Erect a Memorial' should be submitted in writing on the appropriate form to the Cemeteries Office together with

- a sketch and/or design of the proposed memorial;
- the exact dimensions;
- the wording of any inscription;
- the appropriate fee as per the Scale of Charges.

The application to erect a memorial must be signed by the Deed Holder of the grave onto which the memorial is to be placed.

Memorial Masons must not start to make a memorial or add an inscription to an existing memorial until all details (including sizes) have been submitted to the Council with the appropriate fee and approval has been granted in writing.

All memorials are to be made of natural stone, marble or granite. Memorials of concrete, wood, plastic, metal, pottery, glass or fibreglass are not permitted.

### **8.2 Memorial sizes**

Below are the details of the maximum dimensions and types of memorials permitted to be placed onto graves for which the Exclusive Right of Burial has been granted:

#### **Wigston Cemetery:**

Section	Headstone	Kerbs	Planting
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Sections A – L	Height and width are at the discretion of the Council – contact the Cemeteries Office for further advice.	Permitted	Permitted. No planting to exceed 2' 6" (750 mm) in height.
Sections M – S*	Height (including plinth) 2' 6" (750 mm) Width 40" (1002 mm)	Permitted	Permitted. No planting to exceed 2' 6" (750 mm) in height.
Section T (Children's Section)	Height (including plinth) 2' 6" (750 mm) Width 24" (600 mm)	Permitted	Permitted. No planting to exceed 2' 6" (750 mm) in height.
Garden or Remembrance	Height (including plinth) 2' 6" Width 21" (530 mm)	Not permitted	Not permitted

\*S Section – Between 2023 and 2025 a small number of memorials exceeding 2'6" were permitted in this section in error. These have been allowed to remain but no further permits will be issued for memorials exceeding 2'6" in this section of the cemetery.

#### **Oadby Cemetery:**

<b>Section</b>	<b>Headstone</b>	<b>Kerbs</b>	<b>Planting</b>
Sections A, B, C (Consecrated and Unconsecrated)	Height and width are at the discretion of the Council – contact the Cemeteries Office for further advice.	Permitted	Permitted. No planting to exceed 2' 6" (750 mm) in height.
Sections D and E, Chapel Street Annex (CSA) and Oadby Cemetery Extension (Consecrated and Unconsecrated areas in all sections)	Height (including plinth) 2' 6" (750 mm) Width 40" (1002 mm)	Permitted	Permitted. No planting to exceed 2' 6" (750 mm) in height.
Children's Sections (various locations)	Height (including plinth) 2' 6" (750 mm) Width 24" (600 mm)	Permitted	Permitted. No planting to exceed 2' 6" (750 mm) in height.
Garden or Remembrance	Height (including plinth) 2' 6" Width 21" (530 mm)	Not permitted	Not permitted

Vases not exceeding 12" (300 mm) in height may be placed on graves without charge or authority.

### **8.3 Inscriptions**

Stonemasons should not start work on a memorial until approval has been granted in writing by the Council.

The Council reserves the right to refuse permission for a memorial where, in its opinion, the proposed inscription could cause offence or is deemed unsuitable.

### **8.4 Installing a memorial**

The Sexton has the authority to refuse to allow any person to undertake work in the cemetery unless a notice is produced giving the written permission of the Council for such work to be carried out.

All memorials and materials must be carried into the cemetery in a way that does not cause damage to roads, walkways or grass areas.

Memorials must be installed back to back with those on the next adjoining row of grave spaces and must be ground anchored by an approved method suitable for the soil conditions. Fixings generally shall be in accordance with the current Code of Working Practice of the National Association of Memorial Masons.

All surplus materials, rubble and rubbish must be removed from the cemetery immediately following any work and, where the removal of a memorial has been required prior to an interment, the area should be cleared in time for the arrival of the funeral cortege.

No hewing or dressing of stone is permitted to take place in the cemetery.

Boards or other suitable material should be used to protect the adjacent area. Any damage to adjoining graves or memorial stones must be reported to the Council immediately and made good to the satisfaction of the Council.

### **8.5 Removing a memorial**

No memorial shall be removed from the cemeteries without the permission of the Deed Holder or their representative and without the Council being informed of the whereabouts of the memorial.

When a memorial is to be removed to allow a second burial to take place it is the responsibility of the Deed Holder or their agent to remove the memorial at their own risk and expense prior to the burial taking place.

The Council reserves the right to:

- Remove, without notice, any unauthorised monument, memorial, stone, kerb edging, tree, shrub, plant or item erected or placed in the cemetery in contravention of these regulations or where, in its opinion, items reach a condition that could be a health and safety risk;
- Remove a memorial headstone from a grave to allow for adjacent graves to be excavated. As soon as the funeral has taken place the headstone will be fully re-instated by the Council.

## **8.6 Memorial safety**

Memorials remain in the ownership of the Deed Holder or their family and must be kept in good repair.

The Council undertakes a programme of memorial inspections (see separate Memorial Safety Policy) and has the right to lay down or remove (without notice) memorials it believes to be unsafe. Every effort will be made to contact the owner if this happens to advise them of the action taken and request repairs be carried out. Notice will be sent to the Deed Holder at their last recorded address and a notice placed onto the memorial.

If a memorial is not repaired after notification has been sent to the Deed Holder the Council has the right to remove the memorial from the grave space.

## **8.7 Memorial trees and seats**

Applications to purchase memorial seats or memorial trees for installation in the cemeteries should be made through the Cemeteries Office. Where applications are agreed to, the benches and trees will be obtained and installed by the Council and re-charged to the donor as per the Councils' Scale of Fees and Charges.

## **8.8 Items placed onto graves**

The Council will not be liable for any loss, damage, theft or vandalism of any item (including memorial stones) placed onto a grave however caused.

Cemetery staff may remove articles from a grave that, in their opinion, are likely to cause risk, damage or offence or which may interfere with the Council's maintenance of the site.

The following items are not allowed to be placed onto graves and if found will be removed:

- Unauthorised memorials
- Unauthorised kerb edgings
- Artificial grass
- Log roll
- Glass or ceramic items or breakable containers
- Stone chippings or gravel (unless inside an authorised fully kerbed grave)

## **9 Exhumations**

Once interred no human remains (including cremated remains) may be disturbed or removed from a grave unless a licence is first obtained from the Ministry of Justice or, if the grave is in a consecrated area, a Faculty from the Diocese. Any request to exhume human remains should, in the first instance, be made to the Cemeteries Office who will be able to give further advice.

## **10 Cemetery Records**

As soon as is reasonably practicable after a grave has been purchased, or after an interment has taken place, details will be recorded in the burial registers held by the Council and, in the case of new graves, the Grant of Exclusive Right of Burial will be sent to the purchaser.



The burial registers and cemetery plans may be viewed by the public by prior appointment with the Cemeteries Office. Searches of the registers and copies of entries may be made for a fee as laid down in the Councils' Scale of Charges and within the confines of the General Data Protection Regulations.

# Memorial Safety Policy

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# Oadby and Wigston Borough Council – Memorial Safety Policy

## 1. Introduction

- 1.1 Oadby and Wigston Borough Council is responsible for the management of two cemeteries and three closed churchyards:
  - Wigston Cemetery
  - Oadby Cemetery
  - All Saints Churchyard, Wigston
  - St Wistan's Churchyard, Wigston
  - St Peter's Churchyard, Oadby
- 1.2 An important part of the Council's responsibility is to ensure that its cemeteries and closed churchyards are safe places in which to work and for the public to visit.
- 1.3 Historically, health and safety concerns in cemeteries have focused on the risks arising from grave digging. However, in recent years there has been increasing attention on the stability of memorials and the risks these present to cemetery staff and visitors.
- 1.4 There have been a number of deaths nationally in recent years and many serious injuries caused by unsafe memorials. Where accidents have occurred, local authorities have been investigated by the Health and Safety Executive and, in some cases, improvement notices issued. In the most serious cases the Health and Safety Executive has threatened prosecution.
- 1.5 Responsibility for health and safety lies with Oadby and Wigston Borough Council as the burial authority in control of the cemeteries. The Council is bound by the conditions of the Local Authorities Cemeteries Order 1977 and has a legal duty under the Health and Safety at Work Act 1974, Management of Health and Safety at Work Regulations 1999 and Occupiers Liability Act 1957 to ensure that its burial grounds are safe places to work and visit. Managing memorial safety, therefore, is an essential part of controlling the risks to health and safety.
- 1.6 Whilst Oadby and Wigston Borough Council has overall responsibility for the safety of its cemeteries, including risks from unstable memorials, it does not own the memorials. The owner of the memorial is the deed holder (grave owner) or successor in title who is the person responsible for maintaining the memorial so as not to present a hazard. However, the current owner may not be identifiable as some records are extremely old and, in many cases, have not been updated by current relatives/family members.
- 1.7 This policy sets out Oadby and Wigston Borough Council's approach to the safe management of memorials in its cemeteries and closed churchyards and is based on guidance issued by the Institute of Cemetery and Cremation Management 'Management of Memorials' 2019) and the Ministry of Justice ('Managing the Safety of Burial Ground Memorials; practical advice for dealing with unstable memorials' November 2014).
- 1.8 This policy also takes into consideration the Local Government Ombudsmen's 'Special Report; memorial safety in local authority cemeteries' (issued 2006) which provides guidance to burial authorities on the measures they should take to ensure the safety inspection process is well publicised in order to minimise any distress to relatives of the deceased and members of the public.

## 2. Installation of new memorials

- 2.1 The Council has introduced measures to ensure all new memorials and all memorials re-erected following interment are installed by an accredited memorial mason in accordance with the National Association of Memorial Masons Code of Working Practice. These measures require:
- All masons to work to the National Association of Memorial Masons code of working practice
  - All masons to provide a certificate of compliance
  - All masons to hold a British Association of Accredited Memorial Masons or National Association of Memorial Masons fixer licence or a licence issued under a similar qualification scheme.
- 2.2 As at present, an application to erect a memorial (or to add an additional inscription or carry out other works) must have been approved before any works on a memorial may be permitted.
- 2.3 All new memorials must conform to maximum size criteria relevant to particular burial grounds and individual sections. Details of specific restrictions are laid out in the Cemetery Rules and Regulations which is available on the Councils' web site or from the Cemeteries Office on request.

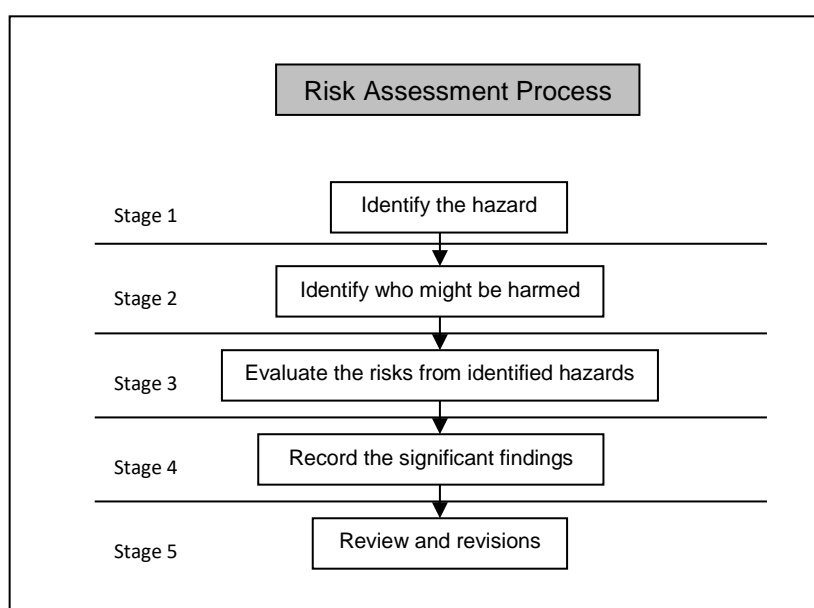
## 3. Publicity

- 3.1 Prior to carrying out any memorial safety inspections every effort will be made to explain to the public what is happening. A high level of publicity and good communication throughout the inspection programme should assist in minimising any distress to the bereaved and reduce cause for complaints.
- 3.2 At least 28 days prior to starting memorial safety inspections:
- notices will be displayed at all main entrances and in conspicuous positions throughout the cemeteries and closed churchyards
  - information will be sent to all local funeral directors and memorial masons
  - press releases will be issued to relevant local newspapers
  - Information will be included on the Council's web site.
  - Notifications will be sent to the Church of England and the Commonwealth War Graves Commission where required.
- The publicity will explain:
- what is being undertaken,
  - when it may be carried out
  - how people can obtain further information
  - how to raise a reasonable or valid objection.
  - how friends or relatives of the deceased can make arrangements to be present during inspections.
- 3.3 Grave owners or relatives of the deceased wishing to be present at the time of the memorial inspection should make their request to the Council as far in advance of any planned inspections as is reasonably practical.

- 3.4 Where information is already held on file to show that the grave owner or the family of the deceased wish to be informed of memorial inspections a letter notifying them of the Council's intentions shall be sent to the contact address at least 28 days prior to commencement of any inspection.

## 4. Risk assessments

- 4.1 Ministry of Justice guidance advises that generic risk assessments should be developed for different types of memorial, using hazard and likelihood ratings to establish levels of risk. Generic risk assessments for the most common types of memorial to be found in the Borough's cemeteries and closed churchyards can be found at appendix 1.
- 4.2 Both the Institute of Cemetery and Cremation Management and the Ministry of Justice recommend taking a risk-based approach to managing memorial safety. Therefore the Health and Safety Executive's five stage risk assessment process will be used as a basis for undertaking the risk assessments. This is illustrated below:



HSE 5-stage risk assessment process

- 4.3 The calculation of risk is used to determine what controls may be required to minimise an injury occurring and the priority of action. Ministry of Justice define a hazard as "anything that may cause harm; the risk is the chance, high or low, that someone could be harmed by the hazard, together with an indication of how serious the harm could be." When completing the risk assessment the following ratings will be used:

Hazard rating	
HRR	Descriptor
1	Very minor or no injury
2	Minor injury (cut)
3	Serious injury (over 3 day/equipment damage)
4	Major injury or permanent disability
5	Single or multiple deaths

Likelihood rating	
LRR	Descriptor
1	Very unlikely
2	Unlikely
3	Possible
4	Probable
5	Definite
Action required after calculation (HRR x LRR)	
Score	Descriptor
1-5	No further controls required
6-8	Further control to be considered, low priority.
9-15	Further controls required – medium priority.
16-20	Further controls required – high priority.
21-25	Immediate action required – urgent priority.

Risk is determined by the calculation:

**Risk = (Likelihood x severity) persons affected**

- 4.4 As part of the risk assessment process it is necessary to carry out inspections of each individual memorial and take measures to control any risks that may be identified. To help with this process the generic risk assessments will be used to give an indication of the level of risk posed should individual memorials be found to be unsafe. An example inspection form can be found at appendix 2.
- 4.5 Inspections will be based on type of memorial, age, prevailing ground conditions, and areas of particular historical or social importance, as well as likely visitor frequency. In combination with the generic risk assessments for different memorial types, a rolling inspection programme will be developed over a five-year period. During this period each memorial will be tested at least once every five years with a visual and hand test to determine any instability or more regularly as required by the findings of the risk assessment process.

## 5. The inspection process

- 5.1 All memorial safety inspections will be carried out by a suitably qualified person in accordance with the guidance provided by the Council, other relevant bodies and national guidelines.



- 5.2 The Council will follow Institute of Cemetery and Crematorium Management guidance and will carry out safety inspections on all memorials in its cemeteries and closed churchyards on a minimum five-year cycle. The initial inspections will be undertaken within a 12 to 18 month period following the approval of this policy. Once the initial inspection has been completed cyclical inspections will take place based on the condition and risk assessment for each memorial.

This is proposed as:

- high risk memorials annually.
  - medium risk every three years.
  - low risk every five years.
- 5.3 For each individual memorial inspected a risk assessment (appendix 2) shall be completed. This assessment will in turn be used to calculate the risk associated with the memorial and whether or not further action to control that risk is required.
- 5.4 A record of all memorial inspections and the results of inspections will be kept by the Council and be available to view on request at the Council's cemeteries section, based at the Oadby Depot (one week's notice will be required for each request).
- 5.5 Immediately prior to carrying out the inspection of any memorial the inspector must ensure that the area around the memorial is clear of all potential hazards, for example members of the public, loose memorial components, glass jars, vases and so on. Particular care should also be taken if the ground conditions are poor or uneven.
- 5.6 If the memorial is overgrown with weeds or vegetation this should be removed prior to inspection. This should be done with care to avoid damage to the memorial and possible risks to safety.
- 5.7 For memorials up to 2.5 metres in height, inspections will include both a visual check and a hand test. The visual check must be completed first and the results recorded on the memorial risk assessment form. The hand test will then be used to determine stability of the memorial. The hand test will be used even where a visual check reveals no sign of defects.
- 5.8 The Council acknowledges that memorials fitted with a ground anchor may move when tested. Staff will be trained to identify when a ground anchor has been fitted and, therefore, will not fail the memorial for movement at the base to foundation joint, as the memorial will 'lock' on the ground anchor.
- 5.9 For memorials over 2.5 metres in height only a visual check will be completed. Where there is cause for concern or uncertainty a Council registered memorial mason will be instructed to carry out a more detailed assessment. Where assessment of the memorial falls outside the experience of this memorial mason or where there remains uncertainty of safety a specialised structural engineer or other suitably qualified professional may be instructed to inspect the memorial more thoroughly.
- 5.12 If visual checks identify a defect or issue with a memorial outside of the experience and knowledge of the person carrying out the check, a memorial mason from the Council's list of approved masons will be instructed to carry out an assessment of the problem. If the problem is viewed to be outside the experience of the memorial mason instructed a structural engineer or other suitably qualified professional shall be called in to advise.

- 5.13 Where kerbstones are found to be breaking apart and the grave space is in a generally poor state of repair the Council, under the Local Authorities Cemeteries Order (1974) is permitted, where appropriate, to remove them from the grave and tidy the grave space. Where this is the intention, notices shall be displayed on the grave space for a period of three months and letters sent to the last known address of the grave owner or their heir(s).
- 5.14 The person carrying out the inspection must ensure that their actions do not pose a hazard to other employees or visitors. When carrying out the hand test it is the inspector's responsibility to ensure that they and all other persons stand out of the possible fall area of the memorial.
- 5.15 No memorials will be removed from the grave space as part of the testing.
- 5.16 For cyclical inspections the previous risk assessment for the memorial should be referred to by the tester prior to commencing works, taking into account local conditions and any potential risks not previously identified. The risk assessment should be amended to reflect any changes and controls put in place to manage these risks.
- 5.17 On consecrated ground the Council will notify the Church of England (Diocese of Leicester) of its intention to test memorials and where appropriate, obtain faculty permission for any works required.
- 5.18 Where appropriate the Council will notify the Commonwealth War Graves Commission of its intention to test memorials and obtain permission for any works required.

## 6. Dealing with unsafe memorials

- 6.1 The chart below indicates the methods available to temporarily make a memorial safe whilst trying to contact the grave owner. The options available will depend on the level of risk identified when the site-specific risk assessment is carried out:

<b>Risk assessment score</b>	<b>Priority level</b>	<b>Options to temporarily make safe:</b>
1-5	No further controls required	No further controls required
6-8	Low priority	Attach safety notice
9-15	Medium priority: further controls required	Attach safety notice and make safe support or lay down
16-20	High priority: further controls required	Attach safety notice and make safe support or cordon off or lay down
21-25	Urgent priority: immediate action required.	Attach safety notice and make safe support or cordon off or lay down

- 6.2 Where a memorial poses a low risk a safety notice shall be placed on the memorial and the grave owner or their heir(s) notified. Safety notices will inform people that the memorial has been found to be unsafe and will explain the action to be taken by the grave owner or their heir(s). The notice will be displayed on or near to the memorial.
- 6.3 Where a memorial poses a medium, high or urgent risk the Council may employ the use of a temporary make safe structural support whilst the grave owner or their heir(s) are contacted. This is in preference to cordoning off the memorial or laying it flat. The memorial will be temporarily stabilised by a stake positioned to the rear of the stone and secured with a binder or strap which, so far as is possible, avoids covering the inscription.
- 6.4 If due to the construction of the memorial a temporary make safe support cannot be fitted correctly then an alternative method of making the memorial safe should be used. Correct fitting of the structural support should not cause a trip hazard or create any other increased risk of injury.
- 6.5 The integrity of all temporary make safe works must be inspected regularly to ensure safety standards are maintained.
- 6.6 Cordoning off may be necessary in some circumstances, for example, for very large memorials or where a significant number of memorials are unsafe within a specific area. When cordoning off a memorial the cordon should extend around the fall area of the memorial not just the memorial as it stands.
- 6.7 Memorials will only be laid down if there is no other practical means of making them safe or where the grave owner or relative has requested it.
- 6.8 Before laying a memorial down the risk of creating a trip hazard should be considered and all necessary precautions taken to reduce this risk, for example resting the memorial on timber packing or positioning the memorial in line with other adjacent memorials.
- 6.9 Before attempting to move any memorial the likelihood of any component parts of the memorial falling during the operation must be assessed by a competent person. Any loose or detached parts must be removed independently.
- 6.10 Where possible when laying memorials down a slight angle will be maintained using a timber packing or by laying the memorial plate on its base to prevent the accumulation of water on the memorial face and the potential for long term damage to the inscription. The exception to this are crosses, which shall be laid flat to prevent them from breaking in two.
- 6.11 If laying a memorial down results in any dowels protruding from the memorial these shall be removed or cut off level with the stone.
- 6.12 When laying a memorial down a mechanical aid should be used to lift any memorial that is considered too heavy to lift by hand. No person should attempt to lift or carry any item that they consider too heavy. If lifting by hand, manual handling guidelines shall be applied.
- 6.13 Where the Council has been unable to contact the grave owner or where the grave owner has been traced but is unwilling or unable to have the memorial repaired it may be decided to partially bury the memorial in order to make it safe.
- 6.14 When partially burying an unsafe memorial at least 25 per cent or 15 inches (380mm) (whichever is the greater of the height) must be below ground. When in place the soil around the memorial should be thoroughly consolidated. When measuring how much of the memorial is to be below ground the measurement is taken from the last joint.

- 6.15 Where it is considered that Council staff cannot move a memorial safely the assistance of a specialist outside company or organisation shall be engaged.
- 6.16 All works to make safe a memorial that has been identified as of an immediate risk to health and safety will be carried out by a suitably qualified person trained in accordance with the guidance provided by the Council, other relevant bodies and national guidelines.
- 6.17 When taking action to make safe or repair memorials that are found to be unsafe priority shall be given to those memorials alongside or close to paths and main thoroughfares, memorials of historical or social importance, and memorials within highly visited sections. These memorials present the biggest risk in terms of potential injury to people visiting or working in the burial ground.
- 6.18 Where a memorial is thought to have a historical or social significance further specialist advice may be sought prior to any remedial works being carried out.
- 6.19 In some circumstances it may be necessary to employ a specialist company or organisation to make memorials safe through repair, laying flat or partial burial. Under these circumstances the guidance in this document and other relevant national guidelines will still apply.
- 6.20 The person(s) carrying out remedial work must review the risk assessment for the memorial prior to commencing works, taking into account local conditions and potential risks not previously identified. If required the risk assessment should be amended to reflect any changes and controls put in place to manage these risks.
- 6.21 The Council will not make a charge for applications from memorial masons to carry out repairs to an existing memorial.

## **7. Contacting owners of unsafe memorials**

- 7.1 Where, after inspection, memorials are found to require maintenance, every effort will be made to contact the grave owner or their heirs in order to carry out any repairs required to the approved standard. The methods of contact will be:
- a notice attached to the unsafe memorial, and
  - a letter to the last known address of the grave owner or updated contact address, and
  - general local press releases, and
  - the Council's web site.
- 7.2 For all memorials found to be unsafe a letter will be sent to the grave owner at their last known address or updated contact address. If the Council receives no response a further letter will be sent after three-months of sending the first letter. These letters will inform the owner that their memorial has been found to be unsafe and details of the actions which need to be taken. If there is no response to these initial two letters a third and final letter will be sent at least six months after the date of the first letter.
- 7.3 Where after at least six months from being found to be unsafe the Council has been unable to contact the grave owner or their heir(s) the Council will take the necessary steps to permanently make the memorial safe. Under these circumstances the memorial could be:
- partially buried in the ground,
  - repaired ( in which case, should relatives be traced in the future they may be asked to contribute to the cost of the repair) or



- permanently laid flat (this is a last resort and the Council prefers not to lay memorials down where an alternative option is available as this causes maintenance problems and trip hazards. Memorials may, however, be laid flat within the confines of an approved kerbset).
- 7.4 Where the grave owner or their heir(s) have been contacted but they are unwilling or unable to have the memorial repaired they will be given the choice to have the memorial partially buried or, if within the confines of an approved kerbset, permanently laid flat.
- 7.5 If no grave owner can be found but a memorial is thought to have heritage or social significance, the Council may consider repairing the memorial at its own expense. Under these circumstances any relative being found in the future would be requested to pay the cost of the repair.
- 7.6 Timescales for the Council to permanently make safe memorials are dependent on the level of risk from the memorial.
- high risk memorials will be permanently made safe after six months.
  - medium risk after one year,
  - low risk after two years.
- 7.7 Where possible the Council will keep an up to date database of all grave owner/ relative contact information. When purchasing grave rights new owners will be requested and encouraged to keep the Council informed of any changes in address.

## **8. General health and safety requirements for carrying out inspections and remedial work**

- 8.1 The following section outlines general health and safety requirements relevant to the inspection and, where necessary, making safe of memorials.
- 8.2 Protective clothing must be worn when carrying out any operation in a burial ground; this includes steel toe capped boots, safety gloves and, when dealing with memorials over 1.5 metres in height, safety helmets
- 8.3 Tools and equipment provided must be suitable for the purpose and inspected prior to use. Any fault that should develop with tools or equipment must be reported immediately. The affected item must not be used until such time as a competent, authorised person has made full repairs.
- 8.4 Manufacturer's instructions should be followed when using equipment or installing memorial make safe structural supports. Users of any lifting equipment must also have undergone the necessary training in the safe use of any particular piece of equipment.
- 8.5 All staff inspecting memorials shall receive specific manual handling training.
- 8.6 No person should attempt to lift or carry any item they consider too heavy. Assistance should be called for if there is any doubt whatsoever.
- 8.7 It is the responsibility of every employee to report any hazard or potential hazard that he or she should notice. In the first instance the employee should, where it is safe to do so, remove the hazard or prevent any person from coming into contact with the hazard.
- 8.8 Should it not be possible to remove the hazard immediately, the employee should report the fact to cemetery staff who shall take the necessary action to remove the hazard.

- 8.9 All accidents and injuries, regardless of how slight, should be reported to cemetery staff and entered into the accident book. All accidents should be investigated by a supervisor or manager and, where findings indicate, a change to the working practice should be made to prevent any recurrence.
- 8.10 All accidents causing an employee to be absent for more than three days must be reported to the enforcing authority.
- 8.11 Accidents that result in a fatality must be reported immediately by telephone to the enforcing authority.
- 8.12 Dangerous occurrences (near misses) must be investigated and where necessary a change made to working practices to prevent a recurrence. Any change in working practice will be identified from the result of risk assessment. If it is considered that a near miss could have resulted in a reportable injury the enforcing authority must be notified immediately.
- 8.13 Employers and employees have a duty of care to protect the health and safety of other employees and members of the public who visit the burial grounds. Staff must be vigilant at all times and consider their actions in respect of the health and safety of visitors.

## **9. Review**

- 9.1 The Council will review this policy on an annual basis to ensure it reflects current national guidance and best practice, or sooner if required, as a result of any changes in legislation or guidance.

## Appendix 1:

### Generic memorial risk assessment - summary for different memorial types should they fail the safety test

**Type of memorial:** Based on National Association of Memorial Mason's code types of memorials

**Hazard rating, likelihood rating, calculation, priority:** See section 4.

**Immediate controls:** See section 6.

**Inspection frequency:** Typical inspection frequencies for types of memorial

low risk – every five years

medium risk – every three years

**high risk – every year**

**Date for removal of risk:** See 7.6 - Higher risks will be removed quicker than lower risks

Risk assessment guidelines: generic memorial risk assessment; summary of different memorial types should they fail the safety test								
Memorial type	Hazard rating	Likelihood rating	Calculation	Priority	Immediate controls	Inspection frequency	Date for removal of risk	Comment
Lawn less than 60cm	2	2	4	Low	Consider warning sign if in prominent location	5 years	None	Increase likelihood rating if fail on dowels

<b>Risk assessment guidelines:</b> generic memorial risk assessment; summary of different memorial types should they fail the safety test								
Memorial type	Hazard rating	Likelihood rating	Calculation	Priority	Immediate controls	Inspection frequency	Date for removal of risk	Comment
Lawn 60-90cm	3	2	6	Low	Warning sign	5 years	2 years	Increase likelihood rating if fail on dowels
Lawn 90-120cm	4	2	8	Low	Warning sign	5 years	2 years	Increase likelihood rating if fail on dowels
Lawn 120-180cm	4	3	12	Medium	Warning sign Consider temporary support	3 years	1 year	Increase likelihood rating if fail on dowels
Lawn greater than 180cm	4	4	16	High	Warning sign Lay flat or cordon off	1 year	6 months	Increase likelihood rating if fail on dowels
Tablets / plaques less than 60cm	2	2	4	Low	Consider warning sign if in prominent location	5 years	None	
Vases less than 60cm	2	2	4	Low	Consider warning sign if in prominent location	5 years	None	Depends on stability of vase. i.e tall slender vases will be greater risk than shorter wider ones.
Vases greater than 60cm	3	3	9	Medium	Warning sign Consider laying flat / cordoning off if in prominent location	3 years	1 year	Depends on stability of vase. i.e tall slender vases will be greater risk than shorter wider ones
Open books less than 60cm	2	2	4	Low	Consider warning sign if in prominent location	5 years	None	If rest or book / rest joints have failed, increase likelihood rating
Open books 60-90cm	3	2	6	Low	Warning sign	5 years	2 years	If rest or book / rest joints have failed, increase likelihood rating



<b>Risk assessment guidelines:</b> generic memorial risk assessment; summary of different memorial types should they fail the safety test								
Memorial type	Hazard rating	Likelihood rating	Calculation	Priority	Immediate controls	Inspection frequency	Date for removal of risk	Comment
Open books 90-120cm	3	3	9	Medium	Warning sign  Consider laying flat / cordoning off if in prominent location	3 years	1 year	If rest or book / rest joints have failed, increase likelihood rating
Open books greater than 120cm	4	4	16	High	Warning sign and lay flat or cordon off	1 year	6 months	If rest or book / rest joints have failed, increase likelihood rating
Crosses less than 60cm	2	3	6	Low	Warning sign  Consider temporary support if in prominent location	5 years	2 years	If failed at top tier or joint between cross and top tier increase likelihood. Need to consider location and likely fall of cross if it fails
Crosses 60-90cm	3	3	9	Medium	Warning sign  Consider temporary support if in prominent location	3 years	1 year	If failed at top tier or joint between cross and top tier increase likelihood. Need to consider location and likely fall of cross if it fails
Crosses 90-120cm	3	4	12	Medium	Warning sign  Consider temporary support	3 years	1 year	If failed at top tier or joint between cross and top tier increase likelihood. Need to consider location and likely fall of cross if it fails
Crosses 120-160cm	4	4	16	High	Warning sign and fit support / lay flat / cordon off	1 year	6 months	If failed at top tier or joint between cross and top tier increase likelihood. Need to consider location and likely fall of cross if it fails
Crosses greater than 180cm	4	4	16	High	Warning sign and cordon off or lay flat	1 year	6 months	If failed at top tier or joint between cross and top tier increase likelihood. Need to consider location and likely fall of cross if it fails

<b>Risk assessment guidelines:</b> generic memorial risk assessment; summary of different memorial types should they fail the safety test								
<b>Memorial type</b>	<b>Hazard rating</b>	<b>Likelihood rating</b>	<b>Calculation</b>	<b>Priority</b>	<b>Immediate controls</b>	<b>Inspection frequency</b>	<b>Date for removal of risk</b>	<b>Comment</b>
Monoliths less than 60cm	2	2	4	Low	Consider warning sign if in prominent location	5 years	None	If ground conditions are poor likelihood should be increased
Monoliths 60-90cm	3	2	6	Low	Warning sign	5 years	2 years	If ground conditions are poor likelihood should be increased
Monoliths 90-120cm	4	2	8	Low	Warning sign	5 years	2 years	If ground conditions are poor likelihood should be increased
Monoliths 120-180cm	4	3	12	Medium	Warning sign Consider temporary support	3 years	1 year	If ground conditions are poor likelihood should be increased
Monoliths greater than 180cm	4	4	16	High	Warning sign and lay flat / cordon off	1 year	6 months	If ground conditions are poor likelihood should be increased
Full grave less than 60cm	2	2	4	Low	Consider warning sign if in prominent location	5 years	None	Increase likelihood rating if fail on dowels
Full grave 60-90cm	3	2	6	Low	Warning sign	5 years	2 years	Increase likelihood rating if fail on dowels
Full grave 90-120cm	4	2	8	Low	Warning sign	5 years	2 years	Increase likelihood rating if fail on dowels
Full grave 120-180cm	4	3	12	Medium	Warning sign Consider temporary support	3 years	1 year	Increase likelihood rating if fail on dowels

<b>Risk assessment guidelines:</b> generic memorial risk assessment; summary of different memorial types should they fail the safety test								
<b>Memorial type</b>	<b>Hazard rating</b>	<b>Likelihood rating</b>	<b>Calculation</b>	<b>Priority</b>	<b>Immediate controls</b>	<b>Inspection frequency</b>	<b>Date for removal of risk</b>	<b>Comment</b>
Full grave greater than 180cm	4	4	16	High	Warning sign Lay flat / cordon off	1 year	6 months	Increase likelihood rating if fail on dowels
Kerbs	2	2	4	Low	None	5 years	None	Assessment needs to be made if trip hazard dependent on location
Flat tablets / plaques	1	2	2	Low	None	5 years	None	
Monuments 120-180cm	4	3	12	Medium	Warning sign Consider temporary support / cordon off	3 years	1 year	Seek further assessment by structural engineer if required
Monuments greater than 180cm	5	4	20	High	Warning sign Cordon off / lie flat	1 year	6 months	Seek further assessment by structural engineer if required

## Appendix 2:

### Example individual assessment form

Cemetery:

<b>Section:</b>	<b>Plot:</b>	<b>Name of deceased:</b>		
<b>Memorial type:</b>	<b>Generic hazard rating:</b>	<b>Generic likelihood rating:</b>	<b>Calculation:</b>	<b>Generic priority:</b>
<b>Height:</b>				
<b>Notes on condition (visual check for cracks, chips, lean, failed joints):</b>				
<b>Ground conditions:</b>	<b>Historical or social importance:</b>	<b>Frequently visited:</b>	<b>Adjacent to path:</b>	
Good / Fair / Poor	Yes / No	Yes / No	Yes / No	
<b>Hand test carried out:</b>		<b>Specialist advice required:</b>	<b>Movement detected:</b>	
Yes / No		Yes / No	Yes / No	



<b>Increased likelihood rating:</b>	<b>Generic hazard rating:</b>	<b>Revised calculation:</b>	<b>Revised priority:</b>	
<b>Action taken:</b>				
<b>Digital image number:</b>		<b>Inspection frequency based on revised risk:</b>		
		Low every 5 years	Medium every 3 years	High every year
<b>Inspected by:</b>		<b>Date:</b>		

### Appendix 3

Useful contacts	
<b>British Register of Accredited Memorial Masons (BRAMM)</b>	<p>Address: % SLCC 8, The Crescent, Taunton, Somerset TA1 4EA</p> <p>Tel: 01788 544 963</p> <p>e-mail: <a href="mailto:bramm@namm.org.uk">bramm@namm.org.uk</a></p> <p>website: <a href="http://www.bramm-uk.org">www.bramm-uk.org</a></p>
<b>Commonwealth War Graves Commission</b>	<p>Address: 2 Marlow Road, Maidenhead, Berkshire SL6 7DX</p> <p>Tel: 01628 634 221</p> <p>website: <a href="http://www.cwgc.org">www.cwgc.org</a></p>
<b>Health and Safety Executive (HSE)</b>	<p>General Enquiries:</p> <p>Tel: 0845 345 0055</p> <p>e-mail: <a href="mailto:hse.infoline@santania.co.uk">hse.infoline@santania.co.uk</a></p> <p>website: <a href="http://www.hse.gov.uk">www.hse.gov.uk</a></p> <p>Report incident:</p> <p>Address: Incident Contact Centre, Caerphilly Business Park, Caerphilly, CF83 3 GG.</p> <p>Tel: 0845 300 9923</p> <p>e-mail: <a href="mailto:riddor@santania.couk">riddor@santania.couk</a>.</p> <p>website: <a href="http://www.hse.gov.uk">www.hse.gov.uk</a></p>
<b>Institute of Cemetery and Cremation Management (ICCM)</b>	<p>Address: ICCM National Office, City of London Cemetery, Aldersbrook Road, Manor Park, London E12 5DQ.</p> <p>Tel: 020 8989 4661</p> <p>e-mail: <a href="mailto:julie.callender@iccm-uk.com">julie.callender@iccm-uk.com</a></p> <p>website: <a href="http://www.iccm-uk.com">www.iccm-uk.com</a></p>
<b>Local Government Ombudsman</b>	<p>Address: PO Box 4771, Coventry, CV4 0EH</p> <p>Tel: 0300 061 0614 or 0845 602 1983</p>

	e-mail: <a href="mailto:advice@lgo.org.uk">advice@lgo.org.uk</a> website: <a href="http://www.lgo.org.uk">www.lgo.org.uk</a>
<b>Ministry of Justice</b>	Address: 102 Petty France, London SW1H 9AJ. Tel: 020 3334 3555 e-mail: <a href="mailto:general.queries@justice.gsi.gov.uk">general.queries@justice.gsi.gov.uk</a> website: <a href="http://www.justice.gov.uk">www.justice.gov.uk</a>
<b>National Association of Memorial Masons (NAMM)</b>	Address: 1 Castle Mews, Rugby, Warwickshire CV21 2XL. Tel: 01788 542 264 e-mail: <a href="mailto:enquiries@namm.org.uk">enquiries@namm.org.uk</a> website: <a href="http://www.namm.org.uk">www.namm.org.uk</a>
<b>The Diocese of Leicester</b>	Contact: Advisor for the Care & Development of Church Buildings. Address: Dioceses of Coventry & Leicester, 1 Hill Top, Coventry, Warwickshire CV1 5AB. website: <a href="http://www.leicester.anglican.org">www.leicester.anglican.org</a>



## EQUALITY ASSESSMENT

### PART 1 - INITIAL SCREENING

<b>Name of Policy/Function:</b>		This is <b>new</b>
<b>Burial Strategy</b>		

<b>Date of screening</b>	2 <sup>nd</sup> September 2025
--------------------------	--------------------------------

#### 1. Briefly describe its aims & objectives

The Burial Strategy draws together our ambitions for the management of Cemeteries and churchyards within Oadby and Wigston. The strategy has been developed to reflect the work of our officer team, partner organisations, community groups and local stone masons or funeral directors who each play a role in maintaining and managing the locations.

The strategy will be used as a framework to prioritise how we manage our Cemeteries and churchyards now and, in the future, to ensure they serve the needs of our communities.

(We are referring to the sites which Oadby & Wigston Borough Council owns and manages, which also have free public access. These sites include 2 cemeteries and 3 closed churchyards)

#### 2. Are there external considerations?

*e.g. Legislation/government directive etc*

Given we do not have a Parish, the Council is duly responsible for these areas and to offer to all community groups.

#### 3. Who are the stakeholders and what are their interests?

Working in partnership is a key element of the strategy, the partners we will be working with include:-  
Secretary Of State  
Volunteers  
Stone Masons or Funeral directors  
All community groups



#### 4. What outcomes do we want to achieve and for whom?

### Aims and Ambitions

The following are the key aims of the service. These are focused on ensuring clarity of process, quality of environment and inclusivity.

1. To provide cemeteries for Oadby and Wigston residents that are beautiful, peaceful and well used
2. To offer burial spaces that support a diverse range of cultural and individual needs
3. To ensure that our policies relating to burials and memorials are clear, well communicated, and consistent
4. To ensure that procedures for the purchase and use of burial sites and memorials are clear, efficient, and compassionate



#### 5. Has any consultation/research been carried out?

In terms of any major changes to the cemeteries and churchyards we will undertake a consultation with local residents and key stakeholders.

#### 6. Are there any concerns at this stage which indicate the possibility of Inequalities/negative impacts?

*Consider and identify any evidence you have -equality data relating to usage and satisfaction levels, complaints, comments, research, outcomes of review, issues raised at previous consultations, known inequalities) If so please provide details.*

None

#### 7. Could a particular group be affected differently in either a negative or positive way?

**Positive** – *It could benefit*

**Negative** – *It could disadvantage*

**Neutral** – *Neither positive nor negative impact or not sure.*

	Type of impact, reason & any evidence
Disability	Neutral
Race (including Gypsy & Traveller)	Neutral
Age	Neutral
Gender Reassignment	Neutral
Sex	Neutral

<b>Sexual Orientation</b>	Neutral
<b>Religion/Belief</b>	Neutral
<b>Marriage and Civil Partnership</b>	Neutral
<b>Pregnancy and Maternity</b>	Neutral

**8. Could other socio-economic groups be affected?**

*e.g. carers, ex-offenders, low incomes, homeless?*

All groups would have fair option to purchase plots as set out in the Scale of charges

**9. Are there any human rights implications?**

*No (If yes, please explain)*

No

**10. Is there an opportunity to promote equality and/or good community relations?**

*Yes (If yes, how will this be done?)*

We have been working with local religious groups to develop our strategy. It is important we consider this wholly to ensure we offer a fair service to all religions.  
All significant changes would undergo consultation to ensure fairness and transparency with decision making.

**11. If you have indicated a negative impact for any group is that impact legal?**

*i.e. not discriminatory under anti-discrimination legislation*

N/A

**12. Is any part of this policy/service to be carried out wholly or partly by contractors?**

Where we are looking to improve accessibility and improve the areas listed, there may be a need to contract work out.

**13. Is a Part 2 full Equality Assessment required?**

No

**14. Date by which a Part 2 full Equality Assessment is to be completed with actions.**

N/A

**Please note that you should proceed to a Part 2, the full Equality Impact Assessment if you have identified actual, or the potential to cause, adverse impact or discrimination against different groups in the community.**

We are satisfied that an initial screening has been carried out and a full equality assessment **is not required\*** (please delete as appropriate).

Completed by: Ben Wilson

Date: 2<sup>nd</sup> September 2025

Countersigned by:

Date: 2<sup>nd</sup> September 2025

Screened by:



Mark Smith

Date: 2<sup>nd</sup> September 2025

Please forward an electronic copy to our Equalities Lead [mark.smith@oadby-wigston.gov.uk](mailto:mark.smith@oadby-wigston.gov.uk)

Equality Assessments shall be published on the Council website with the relevant and appropriate document upon which the equality assessment has been undertaken.

# Agenda Item 9



**Policy, Finance and  
Development  
Committee**

**Tuesday, 03 February  
2026**

**Matter for  
Information and  
Decision**

**Report Title: Treasury Management Policy and Strategies and Prudential Indicators (2026/27)**

**Report Author(s): Simon Ball (Finance Manager)**

<p><b>Purpose of Report:</b></p>	<p>This report contains the Capital Strategy and Prudential Indicators which ensure that the capital expenditure plans of local authorities are affordable, prudent, and sustainable.</p> <p>It also contains the Treasury Management Policy, Strategy and Plan including Treasury Management Indicators detailing the expected treasury management operations and impact on the prudential indicators for the forthcoming financial year.</p> <p>It fulfils the key requirements of the:</p> <ul style="list-style-type: none"> <li>• Local Government Act 2003;</li> <li>• The CIPFA Prudential Code for Finance in Local Authorities;</li> <li>• The CIPFA Code of Practice for Treasury Management in Public Services;</li> <li>• MHCLG Statutory Guidance on Local Government Investments; and</li> <li>• MHCLG Statutory Guidance on the Minimum Revenue Provision.</li> </ul>
<p><b>Report Summary:</b></p>	<p>The report contains the Council's:</p> <ul style="list-style-type: none"> <li>• Capital Strategy including the Prudential Indicators,</li> <li>• Treasury Management Policy</li> <li>• Treasury Management Strategy and Plan including Treasury Management Indicators</li> <li>• Minimum Revenue Provision (MRP) Statement</li> <li>• Investment Strategy for 2026/27</li> <li>• Flexible Use of Capital Receipts Strategy for 2026/27</li> </ul>
<p><b>Recommendation(s):</b></p>	<p><b>a) That the Capital Strategy 2026/27 including the Prudential Indicators (as set out in Appendix 1) be approved;</b></p> <p><b>b) That the Treasury Management Policy, Treasury Strategy and Plan 2026/27 (as set out in Appendices 2 &amp; 3) be approved;</b></p> <p><b>c) That the Minimum Revenue Provision Statement 2026/27 (as set out in Appendix 4) be approved;</b></p> <p><b>d) That the Investment Strategy 2026/27 (as set out in Appendix 5) be approved;</b></p> <p><b>e) That the Flexible Use of Capital Receipts Strategy (as set out in Appendix 6) be approved.</b></p>
<p><b>Senior Leadership, Head of Service,</b></p>	<p>Colleen Warren (Chief Finance Officer / S151 Officer) (0116) 257 2759 <a href="mailto:colleen.warren@oadby-wigston.gov.uk">colleen.warren@oadby-wigston.gov.uk</a></p>



<b>Manager, Officer and Other Contact(s):</b>	<p>Simon Ball (Finance Manager) (0116) 257 2624 <a href="mailto:simon.ball@oadby-wigston.gov.uk">simon.ball@oadby-wigston.gov.uk</a></p> <p>Aseel Qassim (Senior Finance Business Partner) (0116) 257 2890 <a href="mailto:aseel.qassim@oadby-wigston.gov.uk">aseel.qassim@oadby-wigston.gov.uk</a></p>
<b>Strategic Objectives:</b>	Our Council (SO1)
<b>Vision and Values:</b>	"A Stronger Borough Together" (Vision) Resourceful & Resilient (V4)
<b>Report Implications: -</b>	
Legal:	There are no implications directly arising from this report.
Financial:	The implications are as set out in this report.
Corporate Risk Management:	Decreasing Financial Resources / Increasing Financial Pressures (CR1) Reputation Damage (CR4) Regulatory Governance (CR6)
Equalities and Equalities Assessment (EA):	There are no implications directly arising from this report. EA not applicable
Human Rights:	There are no implications directly arising from this report.
Health and Safety:	There are no implications directly arising from this report.
<b>Statutory Officers' Comments: -</b>	
Head of Paid Service:	The report is satisfactory.
Chief Finance Officer:	The report is satisfactory.
Monitoring Officer:	The report is satisfactory.
<b>Consultees:</b>	None.
<b>Background Papers:</b>	None.
<b>Appendices:</b>	<ol style="list-style-type: none"> <li>1. Capital Strategy 2026/27 &amp; Prudential Indicators (2025/26 – 2030/31)</li> <li>2. Treasury Management Policy (2026/27)</li> <li>3. Treasury Management Strategy (2026/27) &amp; Treasury Management Indicators (2026/27 - 2030/31)</li> <li>4. Minimum Revenue Provision (MRP) Statement (2026/27)</li> <li>5. Investment Strategy (2026/27)</li> <li>6. Flexible Use of Capital Receipts Strategy (2026/27)</li> </ol>

## 1. Introduction

- 1.1 The Local Government Act 2003 and supporting regulations require the Council to 'have regard to' the Chartered Institute of Public Finance and Accountancy (CIPFA)

Prudential Code and the CIPFA Treasury Management Code of Practice and to prepare, set and publish a Capital Strategy including prudential indicators, and a Treasury Management Policy, Treasury Strategy and Plan including treasury indicators that ensure the Council's capital expenditure plans are affordable, prudent and sustainable in the long- term.

- 1.2 The prudential indicators consider the affordability and impact of capital expenditure plans and set out the Council's overall capital framework. The prudential indicators summarise expected treasury activity, introduce limits upon that activity and reflect the underlying capital programme. As a consequence, a Treasury Management Strategy is prepared which considers the effective funding of the capital expenditure decisions and complements the prudential indicators.
- 1.3 The Council is required to operate a balanced budget, meaning that cash raised during the year will meet cash expenditure. As part of this, the treasury management operation is to ensure that this cash flow is adequately planned, with cash being available when it is needed. Surplus moneys are invested in low-risk counterparties commensurate with the Council's low risk appetite, providing adequate liquidity initially before considering investment return. The Council is required to calculate its budget requirement for each financial year to include the revenue costs that flow from capital financing decisions. This, therefore, means that increases in capital expenditure must be limited to a level whereby charges to revenue remain affordable within the projected income of the Council for the foreseeable future. These increases in charges may arise from increases in interest charges and debt repayment caused by increased borrowing to finance additional capital expenditure and any increases in operational running costs from new capital projects.
- 1.4 Treasury Management is, therefore, an important part of the overall financial management of the Council's affairs. Treasury Management is defined as: *"The management of the local authority's investments and cash flows, its banking, money market and capital market transactions; the effective control of the risk associated with those activities; and the pursuit of optimum performance consistent with those risks."*
- 1.5 Specific treasury indicators are prepared and included in the Treasury Management Policy and Strategy which also requires Member approval.
- 1.6 The Annual Investment Strategy for Treasury Management investments, sets the limits for the maximum amounts to be invested and the types of investments the Council may consider.
- 1.7 The Minimum Revenue Provision statement states how the Council will charge revenue for capital expenditure, which is financed by borrowing or credit arrangements. Local Authorities are required each year to set aside some of their revenues as provision for this debt. This was revised in November 2023.
- 1.8 The Council's capital and treasury activities are strictly regulated by statutory requirements and guidance, including the CIPFA Prudential Code for Capital Finance in Local Government, CIPFA Treasury Management Code of Practice, Department for Levelling Up Housing and Communities (MHCLG) Investment Guidance and MHCLG Minimum Revenue Provision (MRP) Guidance.
- 1.9 Full Council is required to approve the Capital Strategy and Treasury Management Policy statement for the forthcoming year at or before the start of the year.

- 1.10 Annual reporting to the Policy Finance and Development Committee (PFDC) is required annually to on the activities of the treasury management operation and on the exercise of the Section 151 Officer's delegated treasury management powers.

## **2. Capital Strategy, Treasury Strategies & Prudential Indicators (2026/27)**

- 2.1 The following strategies are attached as appendices for PFDC to recommend to Council on 19 February for approval:

- Appendix 1 – Capital Strategy (2026/27) & Prudential Indicators (2025/26 – 2030/31)
- Appendix 2 – Treasury Management Policy (2026/27)
- Appendix 3 - Treasury Management Strategy (2026/27) & Treasury Management Indicators (2026/27 - 2030/31)
- Appendix 4 – Minimum Revenue Provision (MRP) Statement (2026/27)
- Appendix 5 – Investment Strategy (2026/27)
- Appendix 6 – Flexible Use of Capital Receipts Strategy (2026/27)

- 2.2 The values within these strategies align with the revenue and capital budgets. Changes in capital and treasury indicators will be reported to PFDC on a quarterly basis. All changes to the budgets that impact on the strategies will be agreed with the Section 151 Officer in consultation with the Chair of Policy, Finance and Development Committee.

# Appendix 1

## Capital Strategy Report 2026/27

### Oadby and Wigston Borough Council

#### Introduction

This Capital Strategy report gives a high-level overview of how capital expenditure, capital financing and treasury management activity contribute to the provision of local public services along with an overview of how associated risk is managed and the implications for future financial sustainability. It has been written in an accessible style to enhance Members' understanding of these sometimes-technical areas.

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

#### Capital Expenditure and Financing

Capital expenditure is where the Authority spends money on assets, such as property or vehicles that will be used for more than one year. In local government this includes spending on assets owned by other bodies, and loans and grants to other bodies enabling them to buy assets. The Authority has some limited discretion on what counts as capital expenditure, for example assets costing below £3k are not capitalised and are charged to revenue in year.

- For details of the Authority's policy on capitalisation, see the accounting policies section of the Statement of Accounts:

In 2026/27, the Authority is planning capital expenditure of £5.517m as summarised below:

*Table 1: Prudential Indicator: Estimates of Capital Expenditure in £ millions*

	<b>2026/27 Forecast £000s</b>	<b>2026/27 Forecast £000s</b>	<b>2027/28 Forecast £000s</b>	<b>2028/29 Forecast £000s</b>	<b>2029/30 Forecast £000s</b>	<b>2030/31 Forecast £000s</b>
General Fund	3.364	0.869	0.307	0.823	0.394	0.000
HRA	2.454	4.717	3.509	3.232	2.490	2.503
Capital Investments	0.000	0.000	0.000	0.000	0.000	0.000
<b>Total</b>	<b>5.818</b>	<b>5.586</b>	<b>3.816</b>	<b>4.055</b>	<b>2.884</b>	<b>2.503</b>

The main General Fund capital projects include Vehicle Replacements (£285k), Boiler Replacement at Parklands Leisure Centre, (£118k) and Play Area Improvement (£245k); The Authority does not plan to incur capital expenditure on investments during 2026/27.

The Housing Revenue Account (HRA) is a ring-fenced account which ensures that council housing does not subsidise, or is itself subsidised, by other local services. HRA capital expenditure is therefore recorded separately and includes the building of new housing schemes (£2,213k), and other capital works per the HRA Business Plan (£2,504k).

Capital investments include loans and shares made for service purposes and property held primarily for financial return in line with the definition in the *CIPFA Treasury Management Code*.

**Governance:** Service managers bid annually to include projects in the Authority's capital programme. Bids are collated by Finance who calculate the financing cost (which can be nil if the project is fully externally financed). The Policy, Finance and Development Committee appraises all bids based on a comparison of service priorities against financing costs and makes recommendations to Full Council. The final capital programme will be presented to Full Council in February at the same meeting as this strategy.

➤ For full details of the Authority's capital programme, see:

All capital expenditure must be financed, either from external sources (government grants and other contributions), the Authority's own resources (revenue, reserves and capital receipts) or debt (borrowing, leasing and Private Finance Initiative). The planned financing of the above expenditure is as follows:

*Table 2: Capital financing in £ millions*

	<b>2025/26 Forecast £000s</b>	<b>2026/27 Forecast £000s</b>	<b>2027/28 Forecast £000s</b>	<b>2028/29 Forecast £000s</b>	<b>2029/30 Forecast £000s</b>	<b>2030/31 Forecast £000s</b>
External sources	2.005	0.796	0.00	0.00	0.00	0.00
Capital resources	1.833	1.349	1.774	2.318	0.901	0.517
Revenue resources	1.643	2.841	1.649	1.643	1.889	1.892
Debt	0.337	0.600	0.393	0.094	0.094	0.094
<b>TOTAL</b>	<b>5.818</b>	<b>5.586</b>	<b>3.816</b>	<b>4.055</b>	<b>2.884</b>	<b>2.503</b>

Debt is only a temporary source of finance, since loans and leases must be repaid, and this is therefore replaced over time by other financing, usually from revenue which is known as Minimum Revenue Provision (MRP). Alternatively, proceeds from selling capital assets (known as capital receipts) may be used to replace debt finance. Planned Minimum Revenue Provision payments (MRP) are as follows:

*Table 3: Replacement of prior years' debt finance in £ millions*



	<b>2025/26 Forecast £000s</b>	<b>2026/27 Forecast £000s</b>	<b>2027/28 Forecast £000s</b>	<b>2028/29 Forecast £000s</b>	<b>2029/30 Forecast £000s</b>	<b>2030/31 Forecast £000s</b>
Capital resources	0.000	0.000	0.000	0.000	0.000	0.000
Revenue resources	0.341	0.379	0.415	0.455	0.499	0.547
<b>TOTAL</b>	<b>0.341</b>	<b>0.379</b>	<b>0.415</b>	<b>0.455</b>	<b>0.499</b>	<b>0.547</b>

- The Authority's full minimum revenue provision is available included as Appendix 4 to of this suite of reports.

The Authority's cumulative outstanding amount of debt finance is measured by the capital financing requirement (CFR). This increases with new debt-financed capital expenditure and reduces with MRP and capital receipts used to replace debt. The General Fund CFR is expected to decrease by £0.379 during 2026/27, due to the capital program being funded entirely from capital receipts accruing from the sale of Bushloe House & Oadby Pool. Based on the above figures for expenditure and financing, the Authority's estimated CFR is as follows:

*Table 4: Prudential Indicator: Estimates of Capital Financing Requirement in £ millions*

	<b>2025/26 Forecast £000s</b>	<b>2026/27 Forecast £000s</b>	<b>2027/28 Forecast £000s</b>	<b>2028/29 Forecast £000s</b>	<b>2029/30 Forecast £000s</b>	<b>2030/31 Forecast £000s</b>
General Fund services	21.799	21.420	21.004	20.549	20.050	19.504
Council housing (HRA)	20.188	20.788	21.182	21.275	21.369	21.463
Capital investments	0.000	0.000	0.000	0.000	0.000	0.000
<b>TOTAL CFR</b>	<b>41.987</b>	<b>42.208</b>	<b>42.186</b>	<b>41.824</b>	<b>41.419</b>	<b>40.967</b>

**Asset disposals:** When a capital asset is no longer needed, it may be sold so that the proceeds, known as capital receipts, can be spent on new assets or to repay debt.

Repayments of capital grants, loans and investments also generate capital receipts. The Authority plans to receive circa £5.926m of capital receipts in the 2025/26 financial year, and in future financial years as follows:

*Table 5: Capital receipts receivable in £ millions*

	<b>2025/26 Forecast £000s</b>	<b>2026/27 Forecast £000s</b>	<b>2027/28 Forecast £000s</b>	<b>2028/29 Forecast £000s</b>	<b>2029/30 Forecast £000s</b>	<b>2030/31 Forecast £000s</b>
Asset sales	5.926	0.255	0.255	0.260	0.265	0.270
Loans etc. repaid	0.000	0.000	0.000	0.000	0.000	0.000
<b>TOTAL</b>	<b>5.926</b>	<b>0.255</b>	<b>0.255</b>	<b>0.260</b>	<b>0.265</b>	<b>0.270</b>

- The Authority's Flexible Use of Capital Receipts Policy is available as part of the Full Council reporting pack in February 2026.

### **Treasury Management**

Treasury management is concerned with keeping sufficient but not excessive cash available to meet the Authority's spending needs, while managing the risks involved. Surplus cash is invested until required, while a shortage of cash will be met by borrowing, to avoid excessive credit balances or overdrafts in the bank current account. The Authority is typically cash rich in the short-term as revenue income is received before it is spent, but cash poor in the long-term as capital expenditure is incurred before being financed. The revenue cash surpluses are offset against capital cash shortfalls to reduce overall borrowing.

Due to decisions taken in the past, as at the Authority currently has £33.778m borrowing at an average interest rate of 4.22%.

**Borrowing strategy:** The Authority's main objective when borrowing is to achieve a low but certain cost of finance while retaining flexibility should plans change in future. These objectives are often conflicting, and the Authority therefore seeks to strike a balance between cheaper short-term loans long-term fixed rate loans where the future cost is known but higher.

Projected levels of the Authority's total outstanding debt (which comprises borrowing, PFI liabilities, leases and transferred debt) are shown below, compared with the capital financing requirement (see above).

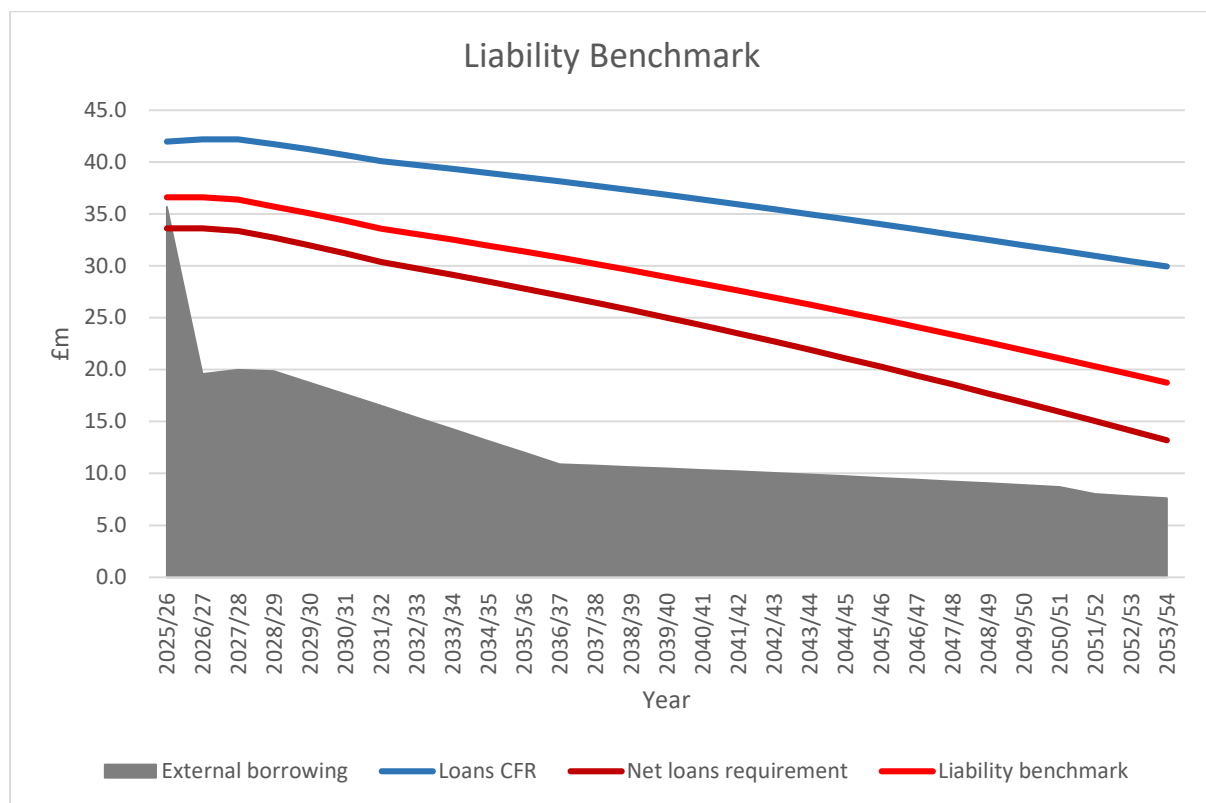
*Table 6: Prudential Indicator: Gross Debt and the Capital Financing Requirement in £ millions*

	2025/26 Forecast £000s	2026/27 Forecast £000s	2027/28 Forecast £000s	2028/29 Forecast £000s	2029/30 Forecast £000s	2030/31 Forecast £000s
GF and HRA Debt	34.784	35.683	36.578	37.571	38.062	38.049
Capital Financing Requirement	<b>41.987</b>	<b>42.208</b>	<b>42.186</b>	<b>41.824</b>	<b>41.419</b>	<b>40.967</b>

Statutory guidance is that debt should remain below the capital financing requirement, except in the short-term. As can be seen from table 6, the Authority expects to comply with this in both the short and medium term.

**Liability benchmark:** To compare the Council's actual borrowing against an alternative strategy, a liability benchmark has been calculated showing the lowest risk level of borrowing. This assumes the same forecasts as table 6 above.

The liability benchmark is an important tool to help establish whether the Council is likely to be a long-term borrower or long-term investor in the future, and so shape its strategic focus and decision making. The liability benchmark itself represents an estimate of the cumulative amount of external borrowing the Council must hold to fund its current capital and revenue plans while keeping treasury investments at the minimum level required to manage day-to-day cash flow.



**Affordable borrowing limit:** The Authority is legally obliged to set an affordable borrowing limit (also termed the authorised limit for external debt) each year. In line with statutory guidance, a lower “operational boundary” is also set as a warning level should debt approach the limit.

*Table 8: Prudential Indicators: Authorised limit and operational boundary for external debt in £m*

	2025/26 Forecast £000s	2026/27 Forecast £000s	2027/28 Forecast £000s	2028/29 Forecast £000s	2029/30 Forecast £000s	2030/31 Forecast £000s
Authorised limit – borrowing	44.0	46.0	47.0	47.0	47.0	46.0
Operational boundary – borrowing	39.0	41.0	42.0	42.0	42.0	41.0

- 
- Further details on borrowing are in the Council’s Treasury Management Strategy

**Treasury investment strategy:** Treasury investments arise from receiving cash before it is paid out again. Investments made for service reasons or for pure financial gain are not generally considered to be part of treasury management.

The Authority’s policy on treasury investments is to prioritise security and liquidity over yield that is to focus on minimising risk rather than maximising returns. Cash that is likely to be spent in the near term is invested securely, for example with the government, other local authorities or selected high-quality banks, to minimise the risk of loss. Money that will be held for longer terms is invested more widely, including in bonds, shares and property, to balance the risk of loss against the risk of receiving returns below inflation. Both near-term and longer-term investments may be held in pooled funds, where an external fund manager makes decisions on which particular investments to buy, and the Authority may request its money back at short notice.

*Table 9: Treasury management investments in £millions*

	2025/26 Forecast £000s	2026/27 Forecast £000s	2027/28 Forecast £000s	2028/29 Forecast £000s	2029/30 Forecast £000s	2030/31 Forecast £000s
Near-term investments	0.000	1.000	1.000	1.000	1.000	1.000
Longer-term investments	0.000	0.000	0.000	0.000	0.000	0.000
<b>TOTAL</b>	<b>0.000</b>	<b>1.000</b>	<b>1.000</b>	<b>1.000</b>	<b>1.000</b>	<b>1.000</b>

**Risk management:** The effective management and control of risk are prime objectives of the Authority's treasury management activities. The treasury management strategy therefore sets out various indicators and limits to constrain the risk of unexpected losses and details the extent to which financial derivatives may be used to manage treasury risks.

- The treasury management prudential indicators are detailed in the Treasury Management Strategy

**Governance:** Decisions on treasury management investment and borrowing are made daily and are therefore delegated to the Section 151 Officer and staff, who must act in line with the treasury management strategy approved by Full Council. Half-yearly reports on treasury management activity are presented to Policy, Finance and Development Committee who scrutinise the treasury management decisions.

### **Commercial Activities**

The Authority has very limited commercial activity which relates to three small shops which form part of an apartment block which is owned by the Council. The rental is c£17k per annum and is therefore not material and as such present little risk.

**Governance:** Decisions on commercial investments are made by the Section 151 Officer alongside the Senior Leadership Team. Any plans would then require approval by Full Council. Property and most other commercial investments are also capital expenditure and purchases will therefore also be approved as part of the capital programme.

### **Liabilities**

In addition to debt of circa £34m (2026/27) detailed above, the Authority is committed to making future payments to cover its pension fund deficit (valued at £7.5m). It has also set aside £327k to cover OWBC share of risks arising from Business Rates appeals.

**Governance:** Decisions on incurring new discretionary liabilities are taken in consultation with the Section 151 Officer. The risk of liabilities crystallising and requiring payment is monitored by Finance and reported to Committee.

- Further details on liabilities and guarantees are shown each year in the Statement of Accounts.

### **Revenue Budget Implications**

Although capital expenditure is not charged directly to the revenue budget, interest payable on loans and MRP are charged to revenue, offset by any investment income receivable. The net annual charge is known as financing costs; this is compared to the net revenue stream i.e. the amount funded from Council Tax, business rates and general government grants.



Table 10: Prudential Indicator: Proportion of financing costs to net revenue stream.

	2025/26 Forecast £000s	2026/27 Forecast £000s	2027/28 Forecast £000s	2028/29 Forecast £000s	2029/30 Forecast £000s	2030/31 Forecast £000s
Financing costs (£m) General Fund	0.874	0.914	0.943	1.021	1.082	1.096
Financing costs (£m) HRA	0.711	0.770	0.796	0.793	0.822	0.797
Proportion of net revenue stream GF	10.9	10.1	10.3	10.7	10.9	10.7
Proportion of net revenue stream HRA	12.0	12.4	12.2	11.6	11.6	10.8

### **Incremental Impact of Capital Investment Decisions on the Band D Council Tax**

The estimates of the incremental impact of capital investment decisions on the Council Tax indicator identifies the trend in the cost of proposed changes in the three-year capital programme recommended in the budget report compared to the Council's existing commitments and current plans. The figures are based on the assumptions included in the budget.

	2025/26 Forecast £	2026/27 Forecast £	2027/28 Forecast £	2028/29 Forecast £	2029/30 Forecast £	2030/31 Forecast £
2025/26 Programme	(5.63)	(5.63)	(5.63)	(5.63)	(5.63)	(5.63)
2026/27 Programme	0.00	2.96	2.96	2.96	2.96	2.96
2027/28 Programme	0.00	0.00	0.84	0.84	0.84	0.84
2028/29 Programme	0.00	0.00	0.00	1.85	1.85	1.85
2029/30 Programme	0.00	0.00	0.00	0.00	0.80	0.80
2030/31 Programme	0.00	0.00	0.00	0.00	0.00	(0.21)
<b>Total</b>	<b>(5.63)</b>	<b>(2.67)</b>	<b>(1.84)</b>	<b>0.01</b>	<b>0.81</b>	<b>0.60</b>

### **Incremental Impact of Capital Investment Decisions on Housing Rent Levels**

The estimates of the incremental impact of capital investment decisions on housing rent levels are similar to the Council Tax calculation. This indicator identifies the trend in the cost of proposed changes in the housing capital programme recommended in the budget report compared to the Council's existing commitments and current plans, expressed as a change in weekly rent levels.

	<b>2025/26 Forecast £</b>	<b>2026/27 Forecast £</b>	<b>2027/28 Forecast £</b>	<b>2028/29 Forecast £</b>	<b>2029/30 Forecast £</b>	<b>2030/31 Forecast £</b>
2025/26 Programme	0.30	0.30	0.30	0.30	0.30	0.30
2026/27 Programme	0.00	(0.31)	(0.31)	(0.31)	(0.31)	(0.31)
2027/28 Programme	0.00	0.00	0.32	0.32	0.32	0.32
2028/29 Programme	0.00	0.00	0.00	0.06	0.06	0.06
2029/30 Programme	0.00	0.00	0.00	0.00	0.07	0.07
2030/31 Programme	0.00	0.00	0.00	0.00	0.00	0.07
<b>Total</b>	<b>0.30</b>	<b>(0.01)</b>	<b>0.31</b>	<b>0.37</b>	<b>0.44</b>	<b>0.51</b>

**Sustainability:** Due to the very long-term nature of capital expenditure and financing, the revenue budget implications of expenditure incurred in the next few years will extend for up to 50 years into the future. The Section 151 Officer is satisfied that the proposed capital programme is prudent, affordable and sustainable following scrutiny of the available funding: the medium-term financial strategy and the due diligence of each project.

### **Knowledge and Skills**

The Authority employs professionally qualified and experienced staff in senior positions with responsibility for making capital expenditure, borrowing and investment decisions. For example, the Section 151 Officer is a qualified accountant with substantial experience. The Authority pays for junior staff to study towards relevant professional qualifications including CIPFA, ACT (treasury) and AAT.

Where Authority staff do not have the knowledge and skills required, use is made of external advisers and consultants that are specialists in their field. The Authority currently employs Arlingclose Limited as treasury management advisers. This approach is more cost effective than employing such staff directly and ensures that the Authority has access to knowledge and skills commensurate with its risk appetite.



**Oadby & Wigston**  
BOROUGH COUNCIL

## Treasury Management Policy

Revised	07/01/2026
Next Revision By	31/01/2027
Head Of Finance Approval	

**OADBY & WIGSTON BOROUGH COUNCIL**

# **TREASURY MANAGEMENT POLICY**

## **Introduction**

The CIPFA code of practice Treasury Management in the Public Services was produced to assist all forms of public bodies with their treasury management strategies. In the publication of this policy the Council formally adopts the CIPFA code of practice as part of its standing orders and financial regulations.

## **Three Key Elements to the Policy**

### **1. The Definition of The Treasury Activities of The Council**

Oadby & Wigston Borough Council defines its treasury management activities as “The management of the organisation’s borrowing, investments and cash flows, including its banking, money market and capital market transaction; the effective control of the risks associated with those activities; and the pursuit of optimum performance consistent with those risks”.

### **2. The role of Risk Management in the Treasury Policy**

Oadby & Wigston Borough Council regards the successful identification, monitoring and control of risk to be the prime criteria by which the effectiveness of its treasury management activities will be measured. Accordingly, the analysis and reporting of treasury management activities will focus on their risk implications for the Council.

### **3. Achievement of Business and Service Objectives**

Oadby & Wigston Borough Council acknowledges that effective treasury management will provide support towards the achievement of its business and service objectives. It is therefore committed to the principles of achieving value for money in treasury management, and to employing suitable, comprehensive performance measurement techniques, with the context of effective risk management.

## **Treasury Management Practices (TMP)**

### **TMP1 Risk Management**

The Section 151 Officer will design, implement and monitor all arrangements for the identification, management and control of treasury management risk, and will report annually on their adequacy and suitability. They must also report, as a matter of urgency, the circumstances of any actual or likely difficulty in achieving the organisation’s objectives in relation to a failure in the policy.

In respect of each of the following risks, the arrangements, which seek to ensure compliance with the stated objectives, are set out in the schedule to this document.



## **1. Liquidity Risk**

Oadby & Wigston Borough Council will ensure it has adequate though not excessive cash resources, borrowing arrangements, overdraft or standby facilities to enable it at all times to have the level of funds available to it which are necessary for the achievement of its operation.

The Council will not borrow earlier than required to meet cash flow needs unless there is a clear business case for doing so and will only do so for the current capital programme, to fund future debt maturities, or to ensure an adequate level of short-term investments to provide liquidity for the organisation

## **2. Interest Rate and Inflation Risk**

The Section 151 Officer, on behalf of the Council, will manage its exposure to fluctuations in interest rates and inflation with a view to containing its net interest costs or revenues in accordance with its treasury management policy and strategy. It will achieve these objectives by the prudent use of its approved financing and investment instruments, methods and techniques, primarily to create stability and certainty of income but at the same time retaining a sufficient degree of flexibility to take advantage of unexpected, potentially advantageous changes in the level or structure of interest rates. The above is subject at all times to the considerations and if required, approval of any policy or budgetary implications.

## **3. Credit and Counterparty Risk**

Oadby & Wigston Borough Council regards a prime objective of its treasury management activities to be the security of the principal sums invested. Accordingly, we will ensure that its counterparty list and limits reflect a prudent attitude towards organisations with whom funds may be deposited, and will limit its investment activities to the instruments, methods and techniques referred to in TMP4, and listed in the schedule to this document.

## **4. Refinancing Risk**

Oadby & Wigston Borough Council will ensure that its borrowing, private financing and partnership arrangements are negotiated, structured and documented, and the maturity profile of the monies raised are managed, with a view to obtaining offer terms for renewal or refinancing if required. All arrangements should be competitive and as favourable to the Council as can reasonably be achieved in the light of market conditions prevailing at the time of transaction.

## **5. Legal and Regulatory Risk**

Oadby and Wigston Borough Council will ensure that all of its treasury management activities comply with its statutory powers and regulatory requirements. It will demonstrate such compliance, if required to do so, to all parties with whom it deals in such activities. It will ensure that there is evidence of counterparties' powers,

authority and compliance in respect of transactions they may affect with the Council, particularly with regard to duty of care and fees charged.

## **6. Operational Risk, Including Fraud, Error and Corruption**

Oadby and Wigston Borough Council will ensure that it has identified the circumstances, which may expose it to the risk of loss through fraud, error, corruption or other eventualities in its treasury management dealings. Accordingly, it will employ suitable systems and procedures, and will maintain effective contingency management arrangements, to enable risk to be minimised.

## **7. Market Risk**

Oadby and Wigston Borough Council will seek to ensure that its stated treasury management policies and objectives will not be compromised by adverse market fluctuations in the value of the principal sums it invests and will accordingly seek to protect itself from the effects of such **fluctuations**.

## **8. Security, Liquidity & Yield**

When considering potential treasury management investments, Oadby and Wigston Borough Council will consider security, liquidity and yield in that order of importance.

Above all, the Council will consider the security of the capital sum invested. The Council needs to be as certain as possible when an investment is made that the amount invested is returned when due.

Liquidity is important because the Council needs cash to deliver its day-to-day activities therefore treasury officers have to determine how much should be invested in call accounts where daily access is available and how much is invested in term accounts where the money is only available on maturity.

Although the generation of yield is distinct from these prudential objectives, that does mean that the Council will ignore potential sources of revenue from investment. Once proper levels of security and liquidity are determined, it will then be reasonable to consider what yield can be obtained consistent with the above priorities. If the Council has an opportunity to invest a sum of money and there are two investment opportunities, each of which meets the security and liquidity criteria, then in this scenario the investment that pays the greatest yield will be chosen

## **9. Environmental, Social and Governance (ESG)**

Environmental, social and governance (ESG) considerations are increasingly becoming a factor in investment decision making, but the framework for evaluating investment opportunities is still developing, and therefore the Council does not currently include ESG scoring at an individual investment level.

Local authorities and other UK government institutions, such as the Debt Management Office, by their very nature as democratically accountable bodies, will meet ESG requirements. As such, it is not intended that any further checking of local authority or UK central government counterparties will be undertaken (other than our standard checks for financial stability).

When investing in banks and funds, the Authority will prioritise banks that are signatories to the UN Principles for Responsible Banking and funds operated by managers that are signatories to the UN Principles for Responsible Investment, and/or the UK Stewardship Code.

The Council will:

- Ensure that as far as is practicable, investment counterparties are committed to the principles of ESG.
- The Council and its counterparties will act with integrity at all times in their dealings.
- The Council will comply with any industry standard ESG guidelines that may arise and always seek to ensure best practice in managing its treasury investments.

This is a developing area for Treasury Management and the Council will continue to monitor progress and develop its policies in line with guidance from both CIPFA and the Council's Treasury Management Advisors.

## **TMP 2      Best Value and Performance Measurement**

Oadby and Wigston Borough Council is committed to the pursuit of best value in its treasury management activities. Accordingly, the treasury management activities will be the subject of ongoing analysis of the value it adds in support of the organisations stated objectives and include measures of effective treasury risk management and not only measures of financial performance (income or savings).

## **TMP 3      Decision-making and Analysis**

Oadby and Wigston Borough Council will maintain full records of its treasury management decisions, and of the processes and practices applied in reaching those decisions. Both for the purpose of learning from the past, and for demonstrating that reasonable steps were taken to ensure that all issues relevant to those decisions were considered at the time. The issues, processes and practices taken account of when reaching decision are detailed in the schedule.

## **TMP 4      Approved Instruments, Methods and Techniques**

Oadby and Wigston Borough Council will undertake its treasury management activities by employing only those instruments, methods and techniques detailed in the schedule, and within the limits and parameters defined in TMP1.

#### **TMP 5      Organisation, Clarity and Segregation of Responsibilities and Dealing Arrangements**

Oadby and Wigston Borough Council considers it essential, for the purpose of the effective control and monitoring of its treasury management activities, for the reduction of the risk or fraud or error, and for the pursuit of optimum performance; that these activities are structured and managed in a fully integrated manner, and that there is at all times clarity of treasury management responsibilities.

That there is a clear distinction between the Section 151 Officer charged with setting treasury management policies and those officers charged with carrying out those policies.

If and when the organisation intends, as a result of lack of resources or other circumstances, to depart from these principles, the Section 151 Officer will ensure that the reasons are properly reported in accordance with TMP6.

#### **TMP 6      Reporting Requirements and Management Information Arrangements**

Oadby and Wigston Borough Council will ensure that quarterly reports are prepared and considered on the implementation of its treasury management policies; on the effects of decisions taken and transactions executed in pursuit of those policies; on the implications of changes resulting from regulatory, economic, market or other factors.

Council will receive:

- Annual Treasury and Investment Strategies and Plan Report for the coming year, including the CIPFA Liability Benchmark
- Quarterly Treasury Management Performance Report to include any non-compliance with the Council's Treasury Management Policy and TMPs, reflecting the Council's quarterly forecast revenue and capital outturns.

#### **TMP 7      Budgeting, Accounting and Audit Arrangements**

Oadby and Wigston Borough Council will account for its treasury management activities in accordance with appropriate accounting practices and standards, and with statutory and regulatory requirements in force.

The Council will ensure that the costs involved in running the treasury management function will pertain to best value.

The Council will ensure its auditors, and those charged with regulatory review have access to all information and papers supporting the activities of the treasury management function as are necessary to fulfil their roles.

#### **TMP 8      Cash and Cash Flow Management**

All monies in the hands of Oadby and Wigston Borough Council will be under the control of the Section 151 Officer and will be aggregated for cash flow and investment management purposes. Cash flow projections will be prepared on a regular and timely basis, using a Liability Benchmark where appropriate, and the Section 151 Officer will ensure that these are adequate for the purposes of monitoring compliance with TMP1 – Liquidity Risk.

#### **TMP 9      Money Laundering**

Oadby and Wigston Borough Council is alert to the possibility that it may become the subject of an attempt to involve it in a transaction involving the laundering of money. Accordingly, we maintain procedures for verifying and recording the identity of counterparties and reporting suspicions.

#### **TMP 10     Staff Training and Qualifications**

Oadby and Wigston Borough Council recognises the importance of ensuring that all staff involved in the treasury management function are fully equipped to undertake the duties and responsibilities allocated to them. We will therefore seek to ensure that individuals are provided with training as required and/or identified by the Oadby and Wigston Borough Council Employee Appraisal and Development process.

#### **TMP 11     Use of External Service Providers**

Oadby and Wigston Borough Council recognises the potential value of employing external providers of treasury management services, in order to acquire access to specialist skills and resources. In doing so we will ensure that the cost and benefits are considered. We will also ensure, where feasible and necessary, that a spread of service providers is used, to avoid over-reliance on one company. Where services are subject to formal tendering standing orders will be applied.

#### **TMP 12     Corporate Governance**

Oadby and Wigston Borough Council is committed to the pursuit of proper corporate governance throughout the authority, and to establishing the principles and practices by which this can be achieved. Accordingly, the treasury management function will be undertaken with openness, transparency, honesty, integrity and accountability.

We have adopted and implemented the key recommendations of the Code, and this together with the other arrangements detailed in the schedule are considered vital to the achievement of proper corporate governance in treasury management. The Section 151 Officer will monitor and if and when necessary, report upon the effectiveness of these arrangements.



## **TREASURY MANAGEMENT PRACTICES - SCHEDULES**

This section contains the schedules which set out the details of how the Treasury Management Practices (TMPs) are put into effect by this organisation.

**TMP 1 Risk Management**

**TMP 2 Best Value and Performance Measurement**

**TMP 3 Decision-making and Analysis**

**TMP 4 Approved Instruments, Methods and Techniques**

**TMP 5 Organisation, Clarity and Segregation of Responsibilities, and Dealing Arrangements**

**TMP 6 Reporting Requirements and Management Information Arrangements**

**TMP 7 Budgeting, Accounting and Audit Arrangements**

**TMP 8 Cash and Cash Flow Management**

**TMP 9 Money Laundering**

**TMP 10 Staff Training and Qualifications**

**TMP 12 Corporate Governance**

### **1. Liquidity**

It will be the function of the Section 151 Officer to calculate from cash flow forecasts the extent of any surplus cash available for investment. There will be no requirement of the Council to maintain a surplus cash balance in the bank account although such surpluses may occur from time to time. The intention should always be to maintain a nil cleared balance as far as possible.

In the event of the Council having to borrow for short-term cash flow reasons this will be carried out through the money markets, or from the Council's bank if more economic.

### **2. Interest Rate and Inflation**

The rate of interest on new investments will be made taking into account the market conditions and obtaining rates from a number of institutions on the Council's counterparty list.

Surplus cash may be invested with those institutions shown on the Council's counterparty list for a maximum maturity of 364 days.

The level of investments placed with any one institution are approved annually within the Treasury Strategy and Plan Report by Council. This limit may be adjusted by Council during the year if it is found to be prejudicial to the interest rates the Authority can earn on its investments.

The Authority determines annually, within its Treasury Strategy and Plan, the level of total external debt, temporary external borrowing, and variable against fixed interest rate exposure.

### **3. Credit and Counterparty Policies**

The Section 151 Officer will be responsible for preparing for the Council a list of institutions in whom the Council's funds may be invested. This list will be supported by details of the criteria employed to assess the various credit standings of counterparties. As a general principle these institutions will have at least F1, F1+ Fitch short term rating or PI Moody's short-term rating although, subject to the supporting report of the Section 151 Officer, other non-rated institutions may be included.

The Council will seek to ensure that the maximum amount of market, media and local intelligence is gathered and communicated to the responsible treasury staff to assist them in constantly reviewing sectors and individual institutions on the approved list. The Section 151 Officer may add, delete or amend institutions on the approved list during the year. In any event, the list of counterparties will be reviewed annually by Council.

The Council's current policy is not to appoint external fund managers. Under the present circumstances, the Authority does not have sufficient surplus funds to give either enough scope or sufficient diversity of portfolio to justify such consultancy fees.

#### **4. Refinancing**

The maturity pattern of all outstanding debt must be reviewed before any new long-term loan is taken and before debt is rescheduled.

Variable and fixed rate funds should be kept under review with the potential of securing discounts.

#### **5. Legal and Regulatory Work**

Treasury management activities will be carried out in accordance with rules governing the investment of local authorities' funds as set out in the Local Authorities (Capital Finance) (Approved Investments) Regulations 1990, and the Local Authorities (Capital Finance) Regulations 1997, as amended.

In addition, activities will be conducted in accordance with the Council's approved Treasury Management Strategy and Plan, and Treasury Management Policy Statement. This includes the adoption of CIPFA's Code of Practice for Treasury Management in the Public Services and CIPFA's Prudential Code for Capital Finance in Local Authorities.

Evidence of officers delegated powers, to borrow and invest, will be provided on request to counterparties as set out in the constitution.

All the banks included in the Council's lending list are authorised under the Banking Act 1987, to accept deposits in the UK.

#### **6. Fraud, Error and Corruption, and Contingency Management**

In order to minimise the possibility of fraud, error, and corruption the procedures for carrying out and monitoring treasury management activities are subject to audit, as well as various internal controls and reporting to the Council.

Evidence of fraud and corruption should be reported to the Section 151 Officer or Monitoring Officer, in accordance with the Council's Anti-Fraud & Corruption Policy, who will then determine the appropriate course of action.

The Chief Executive and Section 151 Officer must include arrangements for the proper and continuous fulfilment of the Treasury Management function in any disaster planning.

The Council's fidelity guarantee insurance provides cover of up to £2.5 million for all employees for losses caused by fraud.

#### **7. Market Risk Management**

The value and performance of the Council's investments is regularly monitored and is reported to Members on an annual basis.

In order to manage risk and protect public funds, the following are the only organisations with which investments will be placed.

- Other Local Authorities
- UK Clearing Banks and their subsidiaries.
- Government Institutions

- Building Societies
- Money Market Funds
- CCLA Property Funds

In addition, each clearing bank or subsidiary will be assessed for its credit standard and rating. The minimum rating that the authority will accept prior to placing a temporary loan are.

- Long Term Investments Fitch Rating A
- Short Term Investments Fitch Rating F1
- Money Market Funds are required to be rated AAA.

In addition, the Authority will invest with Building Societies with an asset base of at least six billion UK pounds as reviewed annually in the Councils Investment Strategy.

There should be a maximum amount which officers are permitted to invest with any one institution. This amount should be reviewed annually within the Treasury and Investment Strategies and Plan Report to the Council. Deposit accounts held with the Councils own bank are not subject to this limit.

The level of external debt, temporary external borrowing and exposure to variable and fixed rate interest should be set within the Treasury Strategy and Plan Report.

## **TMP 2            PERFORMANCE MANAGEMENT**

Banking services are renegotiated or re-tendered normally every 3-5 years to ensure competitive pricing.

The Council uses money broking services in order to make deposits or to borrow. Charges for all services are established prior to using them to ensure that the relevant terms are satisfactory in the light of market conditions.

The following brokers may be used by the Council:

- Martins Brokers
- Tradition Brokers

The quality of service provided by these brokers shall be monitored on a regular basis and reviewed annually.

In order to provide the best possible value in treasury management the Authority may employ financial consultants for specialist advice on the markets and developments in treasury management and accounting.

The following consultants may be used by the Council.

- Arlingclose Treasury Management

The performance of the Council's borrowing activities is monitored by calculating the average interest rate on external borrowing and is compared to the rate for the previous year. This is included in the annual Treasury Management Performance Report.

### **TMP3            DECISION MAKING AND ANALYSIS**

In carrying out treasury management responsibilities the Section 151 Officer will meet on a regular basis with the Finance Team to discuss and agree the implementation of the Treasury Strategy and Plan, monitor performance and make decisions on operational treasury management issues.

Detailed records will be maintained of all borrowing and investments made by the Council. These records are reconciled on a monthly basis to the financial management system.

In respect of borrowing objectives, the Council will:

- minimise the revenue costs of debt.
- manage the debt maturity profile to ensure that there is no overexposure to re-borrowing in any one year.
- effect borrowing at the cheapest cost commensurate with future risk.
- be aware of the future interest rate forecasts and to borrow accordingly.
- monitor and review the level of variable interest rate loans in order to take advantage of interest rate movements.
- ensure that borrowings accord with statutory requirements.

In respect of investment objectives, the Council will:

- maximise the level of return commensurate with maximum protection of the Council's money.
- invest in accordance with the approved list of counterparties.
- manage the maturity profile to ensure that there is no exposure to reinvestment at any point in the year.
- ensure all investments fall within the definitions of Approved Investments

### **TMP4            APPROVED INSTRUMENTS, METHODS AND TECHNIQUES**

#### **1. Treasury Management Procedure Notes**

Detailed procedures to be followed when carrying out cash flow monitoring and any borrowing or investment activities will be maintained and updated as requested.

#### **2. Approved Activities of the Treasury Management Operation**

- borrowing
- lending
- consideration, approval and use of new financial instruments and treasury management techniques
- managing the underlying risk associated with the Council's capital financing and surplus fund activities.
- managing cash flow
- banking activities
- leasing

### 3. Approved Instruments for Investments

The Council will only invest surplus funds in accordance with the investments approved under the Local Government (Capital Finance) (Approved Investments) Regulations 1990 and subsequent amendments i.e.

- Institutions authorised under the Banking Act 1987 by the Bank of England
- Building Societies
- Local Authorities
- Other public sector bodies as permitted by the above regulations.

### 4. Approved Methods and Sources of Raising Capital Finance

The following instruments are available and may be utilised to provide capital finance: -

	Rates of interest	
	Fixed	Variable
PWLB	✓	✓
Market Long-term	✓	✓
Market Temporary	✓	✓
Bank Overdraft		✓
Internal Funds		✓
Operating Leases	✓	✓
Finance Leases	✓	✓

No instruments, other than those listed may be used.

## **TMP5      ORGANISATION, CLARITY AND SEGREGATION OF RESPONSIBILITIES AND DEALING ARRANGEMENTS**

In accordance with the Council's Constitution, Council is responsible for approving the annual Treasury Strategy and Plan.

### 1. Responsibilities of Staff Relating to Treasury Management

#### **Section 151 Officer**

- Ensure that Treasury Management activities comply with the CIPFA Code of Practice for Treasury Management in the Public Services.
- Submit budgets for treasury management activities.
- Implement the Council's Treasury Strategy and Plan.
- Report to Council on the Treasury Strategy and Plan for the next financial year and Treasury Management Performance for the past financial year.
- Ensure the adequacy of internal audit and liaise with external audit.
- Approve the Council's lending list and any changes to it.
- Ensure staff involved in treasury management receive appropriate training.
- Ensure that the treasury management function is adequately resourced.



- Ensure all staff involved in dealing are aware of the principles contained in the Bank of England's London Code of Conduct for corporate dealing in the money market.
- Assess and appoint money brokers.
- Ensure that all proposed transactions are intra-vires.

#### **Finance Manager/Deputy Section 151 Officer**

- Absence cover for the Section 151 Officer
- Prepare the annual Treasury Strategy and Plan Report and the annual Treasury Management Performance Report
- Prepare the annual budget for treasury management activities.
- Review TMPs
- Transmit priority payments.
- Advise the Section 151 Officer on treasury management matters.
- Manage the treasury management function.

#### **Senior Finance Business Partner**

- Check daily cash-flow and agree dealing.
- Ensure adherence to Council's lending list.
- Check monthly reconciliations.
- Maintain procedure notes for the treasury management function.
- Dealing and recording of deals
- Completion of Priority Payment forms
- Maintenance of documentation
- Prepare daily and long-term cash-flow projections.
- Check receipt of treasury management funds
- Prepare documentation to confirm deal which should be signed by an approved signatory.

#### **Finance Business Partner**

- Check daily cash-flow.
- Reconcile Treasury records to the financial ledger on a monthly basis.

#### **Other Responsible Officers**

##### **Head of Paid Services**

- That the system is laid down and properly resourced.
- That the Section 151 Officer complies with statutory guidelines as regards reporting to elected members on treasury policy, activity and performance.

##### **The Monitoring Officer**

- Should ensure that all policy and strategy put forward by the Section 151 Officer complies with the law.

## **2. Dealing and Decision-Making Limits**

All treasury management activities should be carried out in accordance with the annual Treasury Strategy and Plan.

### **TMP 6     REPORTING REQUIREMENTS AND MANAGEMENT INFORMATION ARRANGEMENTS**

#### **1. Annual Treasury Strategy and Plan**

The Treasury Strategy and Plan sets out the expected treasury activities for the forthcoming financial year. This strategy will be submitted to Council for approval before the start of each financial year.

The formulation of the annual Treasury Strategy and Plan involves determining the appropriate borrowing and investment decisions in the light of anticipated movement in both fixed and shorter-term variable interest rates.

The Treasury Strategy and Plan will include the following elements:

- The current treasury position.
- The expected movement in interest rates
- The Council's borrowing and debt strategy
- The Council's investment strategy
- Treasury performance indicators (see 2 below)
- Specific limits on treasury activities
- Local treasury issues

The Section 151 Officer must ensure that all proposed transactions are intra-vires, and if not must make a report under Section 114 of the Local Government Finance Act 1988.

The Section 151 Officer and Chief Executive and Monitoring Officer must ensure that the stated policy is adhered to and if not must also bring the matter to the attention of the elected members as soon as possible.

In the circumstances of a Section 114 report the external auditor must be advised immediately.

#### **2. Borrowing Limits**

As required by the Local Government Act 2003 and CIPFA's Prudential Code for Capital Finance in Local Authorities, Council must approve before the beginning of each financial year the following limits:

- the Authorised Limit for External Debt
- the Operational Boundary for External Debt
- the Upper Limit on Fixed Interest Rate Exposure
- the Upper Limit on Variable Interest Rate Exposure
- A Long-Term Projection of External Debt and the Capital Financing Requirement (the CIPFA Liability Benchmark)

for the forthcoming year and the following two years.

Furthermore, Council must approve before the beginning of the financial year:

- the Lower Limit for the Maturity Structure of Borrowing
- the Upper Limit for the Maturity Structure of Borrowing

for the following periods:

- under 12 months
- 12 months and within 24 months
- 24 months and within 5 years
- 5 years and within 10 years
- 10 years and above.

The Section 151 Officer is responsible for incorporating these limits into the annual Treasury Strategy and Plan and for ensuring compliance with the limits. Should it prove necessary during the year to amend these limits the Section 151 Officer in consultation with the Chief Executive may in exceptional circumstances do so, but only if it is necessary to avoid incurring a loss or cost to the Council.

Any such interim action must be reported to the Leader of the Council and Chairperson of the Policy, Finance and Development Committee and be endorsed at the next meeting of the Council.

### **3. Annual Treasury Management Performance Report**

An annual report will be presented to Council by the end of September, to report on the performance of the Treasury Management Function for the previous year.

This report will include the following.

- Actual borrowing, investments and repayments for the year, detailing counterparty amounts and terms.
- The actual interest rate changes for the year against the original plan.
- A commentary on general performance
- A commentary on compliance with the Treasury Management Policy Statement and the Treasury Strategy and Plan.

## **TMP 7      BUDGETING, ACCOUNTING AND AUDIT ARRANGEMENTS**

### **1. Accounting Practices and Standards**

The Section 151 Officer will prepare a budget for Treasury Management in accordance with the appropriate accounting practices and standards and with the statutory and regulatory requirements in force.

### **2. List of Information Requirements of External Auditors**

External auditors will have access to all papers supporting and explaining the operation and activities of the treasury management function.

## **TMP 8            CASH AND CASH FLOW MANAGEMENT**

Cash flow projections will be prepared on a regular and timely basis in order to effectively manage cash balances and to calculate interest and investment income.

There is no necessity to maintain an aggregate surplus cash balance but where possible it is the intention to achieve a nil cleared balance.

The cash flow forecast is updated daily to take account of income and expenditure i.e. creditors and debtors and this information is provided by the National Westminster Bankline service. This will ensure for the purposes of monitoring compliance with TMP1 Liquidity Risk Management, that adequate funds are available on a regular basis.

Whenever the projected cash flow statement indicates a surplus cash balance funds are invested with institutions on the counterparty list.

The Council make creditor payments on the due date which ensures that funds remain in the account for as long as possible.

Debtor invoices are raised on a regular and timely basis and procedures are in place for reminder and recovery action to take place for unpaid invoices.

Bank statements are received on a daily basis and are reconciled to the Cash Book.

## **TMP 9            MONEY LAUNDERING**

The Council does not accept loans from individuals. Loans are obtained from authorised institutions under the Banking Act 1987, building societies or from other public sector bodies, e.g. the Bank of England or other local authorities.

## **TMP 10          STAFF TRAINING AND QUALIFICATIONS**

A number of different courses are run to accommodate the training requirements of staff involved in treasury management activities, as well as those involved at a strategic level. These courses will explain the complexities of dealing procedures, interest calculations, credit ratings, the regulatory framework, different types of investment instruments, etc.

Seminars are held for staff involved in managing the service, issues covered are for example:

- to provide updates on the implications of new regulations/ legislation
- codes of practice
- to obtain the latest economic forecasts for the economy and interest rates.

## **TMP 11          USE OF EXTERNAL SERVICE PROVIDER**

External Service providers may be employed to give expert advice on borrowing and lending decisions. The Council will at all times make sure that these providers will only be employed where there is a clear value for money benefit to the organisation. The selection of

these providers will be carried out under the Council's Contract Procedure Rules and their performance and value to the organisation will be monitored and measured.

The Council recognises that responsibility for treasury management decisions lies with the Council at all times.

## **TMP 12      CORPORATE GOVERNANCE**

The Council is committed to proper corporate governance, openness and transparency in its treasury management activities as demonstrated by the adoption of the Treasury Management Code of Practice.

Information about the Council's treasury management activities is accessible, and the strategy and outturn reports are public documents.

The procedures set out in the TMPs for reporting and audit (both internal and external audit) are designed to ensure the integrity and accountability of the function.

## **TREASURY STRATEGY AND PLAN 2026/27**

### **1.0 Introduction**

In accordance with the requirements of the Chartered Institute of Public Finance and Accountancy's (CIPFA) latest Code of Practice on Treasury Management and the Council's Treasury Management Policy Statement, a Treasury Strategy and Plan is prepared each year.

For the purpose of this strategy, treasury management includes the management of all capital market transactions in connection with the cash and funding resources of the Council. This covers all funds and reserves including the collection fund and includes the arrangement of leases.

The strategy includes broad principles, which provide the framework within which the Council's treasury management activities are conducted together with detailed plans for the management of the Council's loans and investment portfolios. The strategy includes those indicators required by the Prudential Code that relate to treasury management.

### **2.0 Treasury Management Objectives**

The primary objective of treasury management operations will be to maximise the revenue resources available to the Council whilst ensuring the effective management of risks associated with treasury management activities in accordance with the following principles:

- i) That the cost of borrowing is minimised commensurate with following a prudent funding policy.
- ii) That the most advantageous rates of return on investments are secured commensurate with the primary principle of maintaining the capital value of funds.
- iii) That the Council maintains flexibility in its borrowing and lending portfolios.
- iv) That the Council manages its borrowings and investments as a combined portfolio in order to achieve the optimum net debt position.

The sections below provide a summary of the principal activities anticipated during the period covered.

### **3.0 Balanced Budget Requirement**



It is a statutory requirement under the Local Government Finance Act 1992, for the Council to produce a balanced budget. In particular, it requires a local authority to calculate its budget requirement for each financial year to include the revenue costs that flow from capital financing decisions. This, therefore, means that increases in capital expenditure must be limited to a level of increase in costs to revenue from:-

- Increases in interest charges caused by increased borrowing and,
- Any increase in running costs from new capital projects

to a level which is affordable within the projected income of the Council for the foreseeable future.

#### 4.0 Current Treasury Position

The Council's detailed treasury position is highlighted in the following table.

		31st March 2025 Actual		Rate %	31st March 2026 Forecast		Rate %
		GF £ 000s	HRA £ 000s		GF £ 000s	HRA £ 000s	
Fixed Rate Debt	PWLB	500		4.10	500		4.10
	PWLB		12,076	3.24		11,070	3.27
	PWLB					2,000	5.00
	PWLB	4,301		2.66	4,209		2.66
	Market		3,000	4.80			
	Market	2,000	2,500	5.45			
	Market		2,000	5.45			
	Market	5,000		5.75			
	Market	4,000		5.80			
	Market				500	4,500	4.10
	Market				5,000		4.55
	Market				3,000	2,000	4.55
	Market				500	500	5.00
Total Debt		15,801	19,576		13,709	20,070	
Other Long-term Liabilities		0	0				
<b>Total</b>		<b>15,801</b>	<b>19,576</b>		<b>13,709</b>	<b>20,070</b>	
Fixed Investments		0	0		0	0	
Variable Investments		0	0		0	0	
<b>Total Investments</b>		<b>0</b>	<b>0</b>		<b>0</b>	<b>0</b>	
<b>Net Borrowing</b>		<b>15,801</b>	<b>19,576</b>		<b>13,709</b>	<b>20,070</b>	

## **5.0 Borrowing and Debt Strategy**

### **General Fund**

As at 31<sup>st</sup> March 2025, the Council's outstanding borrowing for General Fund purposes stood at a total of £15.801m. This was made up of two loans from the Public Works Loan Board (PWLB) totalling £4.801m, and £11m of short-term borrowing, as shown in the table at 4.0.

Up until the end of 2015/16, the Council was able to utilise cash balances, held in the form of short-term investments, grants and capital reserves, to help in the funding of its capital programme. Consequently, the Council was able to avoid increasing its long-term borrowing, despite carrying out ambitious schemes both in the General Fund and Housing Revenue Account.

In 2016/17 the financing of the Council's new leisure development was finalised. The Council borrowed £5m from the PWLB, taken over 39 years. The remaining £5m of the £10m project was funded by internal borrowing.

From 2016/17 to 2024/25 the Council did not borrow any further funds long term and instead continued to take advantage of the very low short term rates to keep interest payments under control. While there is scope to continue with this policy to some extent, the need to control the council's exposure to refinancing risk means that future borrowing in support of the capital programme will need to consist of a mix of short and long-term debt.

Short-term debt applicable to the General Fund is forecast to drop to £9m during 2025/26 due to the anticipated capital receipts from the sale of Bushloe House and Oadby Pool. In 2026/27, borrowing of £1.5m is anticipated, followed by £0.5m in 2027/28, £1m in 2028/29, and £0.5m a year thereafter

No new long-term borrowing is forecast on the general fund over the next five years.

Total external short-term borrowing relating to the General Fund for future financial years is expected to be:

2025/26	£9.0 million
2026/27	£10.5 million
2027/28	£11.0 million
2028/29	£12.0 million

2029/30      £12.5 million

2030/31      £12.5 million

No additional short-term borrowing is envisaged as being as necessary for the HRA in 25/26.

The HRA self-financing settlement involved the Council taking on £18.114 million of PWLB borrowing. Repayment of this borrowing commenced at the end of 2019/20, at the rate of £1m per annum. This repayment has been refinanced with short-term borrowing to date, however as from the end of 2025/26, it will be necessary to refinance using new long-term borrowing, in order to maintain the proportion of short-term borrowing to gross debt below 50%. £2.0m of additional PWLB borrowing is expected to be necessary in 25/26, with an additional £1.0m in 26/27, £2m in 27/28, £2.6m in 28/29, £1.1m in 29/30, and £0.6m in 30/31.

## **6.0 Prudential Indicators and Limits on Activity**

The purpose of these Prudential Indicators is to contain the activity of the treasury function within certain limits, thereby reducing the risk of an adverse movement in interest rates impacting negatively on the Council's overall financial position. However, if these are set to be too restrictive they will impair the opportunities to reduce costs.

### **6.1 Authorised Limit for External Debt**

This represents the limit beyond which borrowing is prohibited and needs to be set and revised by Council. It reflects the level of borrowing which, while not desired, could be afforded in the short-term, but is not sustainable. It is the expected maximum borrowing need with some headroom for unexpected movements. This is the statutory limit determined under section 3(1) of the Local Government Act 2003.

	<b>2025/26 Estimate £ 000s</b>	<b>2026/27 Estimate £ 000s</b>	<b>2027/28 Estimate £ 000s</b>	<b>2028/29 Estimate £ 000s</b>	<b>2029/30 Estimate £ 000s</b>	<b>2030/31 Estimate £ 000s</b>
Authorised limit – borrowing	44.0	46.0	47.0	47.0	47.0	46.0
Other Long Term Liabilities	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>44.0</b>	<b>46.0</b>	<b>47.0</b>	<b>47.0</b>	<b>47.0</b>	<b>46.0</b>

The Chief Financial Officer (Section 151 Officer) reports that the authorised limits given above are consistent with the council's current commitments, existing plans and the proposals in the capital programme report. The limits are also consistent with the Council's approved treasury management policy statement and practices. Risk analysis of the key elements of the council's cash flow forecasts has been undertaken to determine these limits.

## 6.2 Operational Boundary for External Debt

This indicator is based on the probable external debt during the course of the year (allowing for peaks and troughs in cash flow and the impact of treasury management decisions). It is not a maximum and actual borrowing could vary around the boundary for short times during the year. It should act as an indicator to ensure the authorised limit is not breached.

	2025/26 Estimate £ 000s	2026/27 Estimate £ 000s	2027/28 Estimate £ 000s	2028/29 Estimate £ 000s	2029/30 Estimate £ 000s	2030/31 Estimate £ 000s
Borrowing	39.0	41.0	42.0	42.0	42.0	41.0
Other Long Term Liabilities	0.0	0.0	0.0	0.0	0.0	0.0
<b>Total</b>	<b>39.0</b>	<b>41.0</b>	<b>42.0</b>	<b>42.0</b>	<b>42.0</b>	<b>41.0</b>

## 6.3 Limits in Interest Rate Exposure

**Upper Limits on Variable Rate Exposure** – This indicator identifies a maximum limit for variable interest rates based upon net interest payments.

**Upper Limits on Fixed Rate Exposure** – Similar to the previous indicator this covers a maximum limit on fixed interest rates.

	2023/24 Upper %	2024/25 Upper %	2025/26 Upper %	2026/27 Upper %	2027/28 Upper %	2028/29 Upper %
Limits on Fixed Interest Rates	100	100	100	100	100	100
Limits on Variable Interest Rates	25	25	25	25	25	25

## 6.4 Maturity Structure of Fixed Borrowing

These gross limits are set to reduce the Council's exposure to large fixed rate sums falling due for refinancing.

	Lower %	Upper %
Under 12 months	0	50
12 months to 2 years	0	50
2 years to 5 years	0	50
5 years to 10 years	0	100
10 years and above	0	100

## 6.5 Total Principal Sums Invested

The purpose of this indicator is to control the Council's exposure to the risk of incurring losses by seeking early repayment of its investments. The limits on the long-term principal sum invested to final maturities beyond the period end will be:

Price Risk Indicator	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
Limit on principal invested beyond year end	£10m	£10m	£10m	£10m	£10m	£10m

## 7.0 Local Performance Indicators

The Code of Practice on Treasury Management requires the Council to set performance indicators to assess the adequacy of the treasury function over the year. These are distinct historic indicators, as opposed to the Prudential Indicators, which are predominantly forward looking. The Council also sets local performance indicators which are as follows.

Local Indicator	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
Average rate of interest on borrowing compared to the national average	Level	Level	Level	Level	Level	Level
Average rate of interest on investments compared to the national average	Level	Level	Level	Level	Level	Level

The results of these indicators will be reported as part of the Treasury Management Annual Report before 30<sup>th</sup> September each year.



## **Minimum Revenue Provision Statement 2026/27**

### **Annual Minimum Revenue Provision Statement 2026/27**

An underpinning principle of the local authority financial system is that all capital expenditure must be financed either from capital receipts, capital grants (or other contributions), by debt or eventually from revenue.

Where the Authority finances capital expenditure by debt, it must put aside resources to repay that debt in later years. The amount charged to the revenue budget for the capital expenditure is known as "Minimum Revenue Provision" (MRP), although there has been no statutory minimum since 2008. The Local Government Act 2003 requires the Authority to have regard to the former Ministry of Housing, Communities and Local Government's Guidance on Minimum Revenue Provision (the MRP Guidance) most recently issued in 2018.

The broad aim of the MRP Guidance is to ensure a prudent provision is made from revenue over time to cover the total amount of capital expenditure needed to be met from revenue. A prudent provision is where the period over which MRP is charged is aligned to the period over which the capital expenditure provides benefits.

The MRP Guidance requires the Council to approve an Annual MRP Statement each year and recommends a number of options for calculating a prudent amount of MRP. However, the Guidance gives flexibility in how MRP is calculated, providing the calculation is 'prudent'. The following Statement incorporates options recommended in the Guidance.

#### **Minimum Revenue Provision Policy**

- For capital expenditure incurred before 1st April 2008, and for supported capital expenditure incurred on or after that date, MRP is calculated using the Capital Financing Requirement (CFR) method.

The CFR method calculates MRP as 2% of the non-housing CFR at the end of the preceding financial year (2% of the capital expenditure funded by supported borrowing).

- For unsupported capital expenditure incurred after 31st March 2008, MRP is calculated using the Weighted Average Asset Life method.

The Weighted Average Asset Life method requires that the MRP for non-supported debt be calculated by dividing the non-supported CFR by a weighted average of the expected lifetime of the Council's assets on an annuity instalment basis. The annuity rate applied will be the PWLB rate for the weighted average assets life at the date the policy is approved. In the case of Oadby and Wigston, the weighted average asset life is currently 31 years.

This approach gives a robust basis and has been recognised as appropriate by the external auditors in a number of authorities in the past. It also allows for borrowing which is not directly linked to a particular asset. Treasury management procedures mean that the cheapest course of action to fund expenditure is to use the Council's uncommitted cash balances before borrowing externally, due to the returns on cash deposits being lower than borrowing rates. This means that we may be able to delay borrowing whilst we use our own

cash, hence when we do decide to borrow this is not always directly attributable to a specific asset, it may in fact fund a number of assets or capital enhancements to existing assets.

Capital expenditure funded by prudential borrowing in year will not be subject to a MRP charge until the following year or the year after the asset becomes operational if that is beyond the following year.

### **HRA**

No MRP will be charged in respect of assets held within the Housing Revenue Account.

This is due to:

- There is no statutory requirement to make a MRP in the HRA,
- Repayment of HRA debt began in March 2020 and
- Resources were required in the early years of the HRA business plan to fund the demands of the asset management strategy

It is planned in the short term that HRA external debt will be replaced with short term borrowing, in order to minimise the costs of servicing the debt. However, from 2025/26 onwards, it will be necessary to take on new long-term borrowing, in order maintain the proportion of short-term borrowing to gross debt below 50%.

## **INVESTMENTS STRATEGY 2026/27 – 2029/30**

### **1.0 Introduction**

This strategy is written in accordance with guidance issued under section 15 (1) (a) of the Local Government Act 2003, the Department of Levelling Up and Housing and Communities (DLUHC) Guidance on Local Authority Investments (3<sup>rd</sup> Edition) effective from 1 April 2018, , the revised CIPFA Treasury Management in Public Services Code of Practice and Cross Sectoral Guidance Notes (2021) and the revised CIPFA Prudential Code (2021).

The objectives of this strategy are to:

- Security - facilitate investment decisions which ensure that the Council's investment sums remain secure
- Liquidity - ensure the liquidity of investments so that the Council has sufficient cash resources available to carry out its functions at all times
- Optimum Yield - achieve the maximum return on investments after taking into account security and liquidity

### **2.0 Current Investments**

Surplus funds arising from day to day operations are invested based on the most up to date forecasts of interest rates and in accordance with the Council's cash flow requirements in order to gain maximum benefit from the Council's cash position throughout the year. In the current financial climate only specified investments will be considered as set out below.

### **3.0 Investments: Loans**

In accordance with relevant guidance, all investments will be placed with counterparties included on the Council's approved list. Institutions with which specified investments will be made include:

- UK government institutions and other local authorities
- institutions which have been awarded a high quality credit rating by a credit rating agency

The length of time an investment can be place for is specified below under each category of counterparty, normally this will be no longer than 364 days.

Non-Specified Investments are any investment not meeting the definition of a specified investment above. The Authority does not intend to make any investments denominated in foreign currencies, nor any that are defined as capital expenditure by legislation, such as company shares. Non-specified investments will therefore be limited to long-term investments, i.e. those that are due to mature 12 months or longer from the date of arrangement, and investments with bodies and schemes not meeting the definition on high credit quality.

The Council's Treasury Management Practice note 1 (3) states that 'The Section 151 Officer will be responsible for preparing for the Council a list of institutions in which the Council's funds may be invested. This list will be supported by details of the criteria employed to assess the various credit standings of counterparties'. The following credit ratings will be considered:

- Long-term ratings – these range from the highest rating of AAA to the lowest rating of D. As the title suggests, this indicator reflects the long-term stability of the institution.
- Short-term ratings - These have a time horizon of less than 12 months and therefore place greater emphasis on the liquidity necessary to meet financial commitments in a timely manner. As most of the Council's investments are expected to be for less than 364 days, this is of particular importance. The ratings are F1 (highest credit quality), F2 (good credit quality), F3 (fair credit quality) and B to D (representing various levels of potential default).
- Individual ratings – These range from the highest of A to the lowest of F. This rating is only assigned to banks and attempts to assess how it would be viewed if it were entirely independent and could not rely upon external support.
- Support ratings – These range from 1 to 5 with 1 being the highest. It is a judgement on whether a bank would receive support should this become necessary. It is assumed that any such support would come from the sovereign state or institutional owners.

The Council's counterparty list needs to provide security for the amounts invested whilst containing a sufficient number of institutions with which to place funds. For the purpose of this strategy in respect of Categories 1 and 2 below, only counterparties that meet all of the following criteria will be considered for investment.

- UK banks
- Building societies with asset bases in excess of £6 billion.
- By reference to all three major credit rating agencies (Fitch, Standard and Poor's, Moody's) only those that reach the minimum standard for the lowest agency rating set out.

### Category 1

The minimum ratings that will be considered for all agencies are set out below:

Term	Credit Agency		
	Fitch	Moody's	S & P
Short	F1	P1	A1
Long	AA-	AA3	AA-
Individual	C	D	
Support	3		

For any organisation that meets the above criteria, up to £1.5m may be invested at any one time for a maximum duration of 364 days.

**Any building society that meets the above criteria must also have an asset base in excess of £6 billion.**

### Category 2

The minimum ratings that will be considered for all agencies are set out below:

Term	Credit Agency		
	Fitch	Moody's	S & P
Short	F1	P1	A1
Long	A	A2	A1
Individual	C	D	
Support	3		

For any organisation that meets the above criteria, up to £1m may be invested at any one time for a maximum duration of maximum duration of 364 days.

**Any building society that meets the above criteria must also have an asset base in excess of £6 billion.**

Other counterparties that can be used and any restrictions applicable are set out below.

### Debt Management Office

Investments of a maximum duration of 6 months can be made with this Government department and are unrestricted in value.

### Public Authorities in England, Scotland and Wales

Investments totalling up to £5m at any one time with a maximum duration of three years can be made with these bodies. These include local government, fire and police authorities.

The Council exercises due diligence by assessing the organisation's financial stability. This is achieved by reviewing their credit status, most recent audited

financial statements, auditor's report, budget report and current news which is financial in nature. All decisions are signed off by the Section 151 Officer or the Deputy Section 151 Officer.

### Money Market Funds

Investments of up to £1.5m per fund at one time can be made provided they are AAA rated.

Credit ratings are monitored on a daily basis using Arlingclose credit rating service by the Section 151 Officer who will determine the amendments to be made to the counterparty list when credit ratings change.

The proposed counterparty list for investments is given at Annex 1.

The period for which investments are placed will be based on the Council's cash flow forecasts and estimates of movements in interest rates. The Council generally does not expect to place investments for longer than 364 days. This situation will be kept under review by the Section 151 Officer should a longer-term investment opportunity occur. Long-term investments will only be made where it is clear that surplus cash resources are not required for the day-to-day financing of the Council's activities. The maximum period for any long-term investments will be the three-year planning cycle covered by this strategy.

## **4.0 Policy on the Use of External Service Providers**

External advisors will be used when appropriate e.g. to undertake independent valuations prior to acquisition, asset valuation or when there is a lack of expertise in-house regarding an industry.

The Authority uses Arlingclose as an external treasury advisor but still recognise that responsibility for treasury management decisions remains with the Council at all times. Whilst it is recognised that undue reliance should not be placed on external advisors, it is valuable to be able to access specialist skills and resources.

## **5.0 Scheme of Delegation**

Full Council

- Approval of annual strategy
- Review of treasury management policy and procedures, including making recommendations to responsible body

Policy, Finance and Development Committee

- Approval of annual treasury outturn report
- Approval of mid year treasury management updates
- Mid year treasury management updates

Section 151 Officer

- Day to day management of treasury management, within agreed policy
- Appointment of external advisors, within existing Council procurement procedures and standing orders.

## **6.0 Role of Section 151 Officer**

The Section 151 Officer has day to day responsibility for running the treasury management function.

## **7.0 Ethical Investment Strategy**

The Council aims to be aware of ethical issues within its investment strategy. Where any member of the Council becomes concerned about such issues, these matters should be reported to the Section 151 Officer. Where necessary, the Section 151 Officer will then present a response to the concerns raised to the next meeting of the Policy, Finance and Development Committee.



**EXTERNAL INVESTMENT OF FUNDS - APPROVED INSTITUTIONS****Category 1**

<b>Restrictions</b>	
<b>Max Amount £m</b>	1.5
<b>Duration</b>	364 days
<b>Asset Base (Building Societies Only)</b>	£6 bn

**Category 2**

<b>Restrictions</b>	
<b>Max Amount £m</b>	1
<b>Duration</b>	364 days
<b>Asset Base (Building Societies Only)</b>	£6 bn

The following institutions will also be classed as Category 2 although they currently may not meet the exact criteria.

Barclays Bank Plc

Lloyds Bank Plc

HSBC Plc

Santander UK Plc

National Westminster Bank Plc

Royal Bank of Scotland Plc

Bank of Scotland Plc

Nationwide Building Society

**Debt Management Office**

<b>Restrictions</b>	
<b>Max Amount £m</b>	N/A
<b>Duration</b>	6 months

Operated by a National Government Department

### **Public Authorities in England, Scotland and Wales**

<b>Restrictions</b>	
<b>Max Amount £m</b>	5
<b>Duration</b>	3 Years

All public authorities (including local government, fire and police authorities) in England, Wales and Scotland

### **Money Market Funds**

<b>Restrictions</b>	
<b>Max Amount £m</b>	1.5
<b>Duration</b>	N/A

Funds must be AAA-rated and operated by a company regulated by the Financial Services Authority. The Section 151 Officer, under delegated powers, will choose the appropriate fund(s).

# Appendix 6

## Flexible use of Capital Receipts Strategy 2026/27

### 1 Introduction

- 1.1 In the 2022/23 Provisional Local Government Finance Settlement the following was announced:

***Extension of the flexibility to use capital receipts to fund transformation projects.***

*We are also announcing a 3-year extension from 2022-23 onwards of the existing flexibility for councils to use capital receipts to fund transformation projects that produce long-term savings or reduce the costs of service delivery. We will provide further details on the extension in due course.*

- 1.2 On 4 April 2022, the Department of Levelling Up, Housing, and Communities confirmed this extension and published Guidance and a Direction. On 18<sup>th</sup> December 2023, it was announced that the flexibility scheme would be further extended to 31<sup>st</sup> March 2030.
- 1.3 The Council has previously produced strategies to 2022/23 in respect of the previous flexibility. This Strategy has been updated and produced for the financial year 2026/27, in the light of the extension and revised Guidance received in 2022 and 2023.

### 2 Objectives and purpose

- 2.1 This Strategy is intended to enable the Council to potentially take advantage of this flexibility if appropriate. The Strategy forms part of the delivery of the Corporate Strategy and particularly supports the theme of Financial Sustainability.
- 2.2 The objectives of this Strategy are to:
- Outline the methodology for funding projects using this flexibility;
  - Identify actual and potential capital receipts that could be utilised to fund transformation projects;
  - Identify projects that are considered to be eligible and which could be funded by this method;
  - In subsequent years, report on the progress of projects approved in previous years.
- 2.3 The Guidance sets out examples of qualifying expenditure which includes “funding the cost of service reconfiguration, restructuring or rationalisation (staff or non-staff), where this leads to ongoing efficiency savings or service transformation” and it is for this purpose that the Council is proposing to use Capital Receipts in 2026/27.

### **3 2026/27 Revenue Budget**

- 3.1 To support the significant and continued reconfiguration of the Council's systems to deliver digital transformation, it proposed that the associated one-off implementation costs are funded from capital receipts. The legitimacy of this use will be determined by the S151 Officer in order to ensure that it meets the requirements set out by the Secretary of State.

### **4 The Prudential Code**

- 4.1 The Council has due regard to the requirements of the Prudential Code and the impact on its prudential indicators from the application of this Flexible Use of Capital Receipts Strategy.
- 4.2 Any capital receipts which are received and not allocated will be used to fund revenue costs incurred to support the Council's service development and delivery of savings and efficiencies. These receipts have not been earmarked as funding for any other proposed capital expenditure and therefore there is no anticipated additional impact on the Council's prudential indicators as set out in the Council's Treasury Management Strategy.
- 4.3 The Council will also have due regard to the Local Authority Accounting Code of Practice when determining and including the entries required from undertaking and funding this scheme within the 2026/27 Statement of Accounts.

### **5 Monitoring the strategy**

- 5.1 Implementation of this Strategy will be monitored as part of regular financial reporting arrangements.

### **6 Projects and activities to be funded by the Flexible Use of Capital Receipts**

- 6.1 The following sets out the projects and activities that the Council is currently undertaking.

<b>Project</b>	<b>Description and Progress</b>	<b>Lead</b>	<b>Planned value and timing of use of receipts</b>
Digital Transformation Officer	Revenue costs associated with the funding of this post.	Head of Neighbourhood Services	£50,000 per annum 2026/27 – 2027/28

# Agenda Item 10



**Policy, Finance and  
Development  
Committee**

**Tuesday, 03 February  
2026**

**Matter for  
Information and  
Decision**

**Report Title:** **2026/27 Revenue Budget, Medium Term Financial Plan and  
2026/27 – 2030/31 Capital Programmes**

**Report Author(s):** **Simon Ball (Finance Manager)  
Colleen Warren (Chief Finance Officer / S151 Officer)**

<b>Purpose of Report:</b>	For Committee to approve the General Fund Revenue Budget for 2026/27, the Housing Revenue Account revenue budget for 2026/27 and Capital Programme and the MTFP for 2026/27 to 2030/31.
<b>Report Summary:</b>	<p>The report outlines the final proposed General Fund Revenue Budget for 2026/27, which is a balanced budget with no use of the general fund reserve.</p> <p>The five-year Medium Term Financial Plan 2026/27 to 2030/31 shows a forecast cumulative surplus of £3.27M.</p> <p>The report also presents the Housing Revenue Account which sets out the high level 5-year position.</p> <p>The report sets out future schemes to be added to the capital programme as funding is secured.</p> <p>Finally, the report sets out the Section 151 Officer's statement on robustness of estimates and adequacy of reserves, as required by Section 25 of the Local Government Act 2003.</p>
<b>Recommendation(s):</b>	<p><b>a) Recommend that Committee approve the General Fund Revenue Budget for 2026/27 as set out in Appendix 1;</b></p> <p><b>b) Recommend that Committee approve to increase Council Tax by the maximum core referendum limit of 2.99% as announced in the Local Government Settlement;</b></p> <p><b>c) Recommend that Committee approve a housing rent and service charge increase of 4.8%;</b></p> <p><b>d) Recommend that Committee approve the HRA budget for 2026/27, as detailed in Table 4 and notes the HRA MTFP;</b></p> <p><b>e) Recommend that Committee approve the adoption of rent convergence at up to £3 per week when legislation allows;</b></p> <p><b>f) Recommends that Committee approves the Scale of Fees and Charges as set out in Appendix 4 and approves an ongoing annual increase by the September CPI rate;</b></p> <p><b>g) Recommends that Committee approves the Capital Schemes of the General Fund and HRA as set out in Appendix 5;</b></p> <p><b>h) Recommends that Committee notes the MTFP for 2026/27 to 2030/31 as set out in Table 7; and</b></p> <p><b>i) Recommends that Committee notes the S151 Officer's statement on the robustness of the budget and the adequacy of reserves as set out in Section 13 of the report.</b></p>

<b>Senior Leadership, Head of Service, Manager, Officer and Other Contact(s):</b>	Colleen Warren (Chief Finance Officer / S151 Officer) (0116) 257 2759 <a href="mailto:colleen.warren@oadby-wigston.gov.uk">colleen.warren@oadby-wigston.gov.uk</a>  Simon Ball (Finance Manager) (0116) 257 2694 <a href="mailto:simon.ball@oadby-wigston.gov.uk">simon.ball@oadby-wigston.gov.uk</a>
<b>Strategic Objectives:</b>	Our Council (SO1)
<b>Vision and Values:</b>	"Our Borough - The Place to Be" (Vision) Resourceful & Resilient (V4)
<b>Report Implications:-</b>	
Legal:	There are no implications arising from this report.
Financial:	The implications are as set out in the report.
Corporate Risk Management:	Decreasing Financial Resources / Increasing Financial Pressures (CR1) Reputation Damage (CR4) Regulatory Governance (CR6) Organisational / Transformational Change (CR8)
Equalities and Equalities Assessment (EA):	There are no implications directly arising from this report. EA not applicable
Human Rights:	There are no implications arising from this report.
Health and Safety:	There are no implications arising from this report.
<b>Statutory Officers' Comments:-</b>	
Head of Paid Service:	The report is satisfactory.
Chief Finance Officer:	As the author, the report is satisfactory.
Monitoring Officer:	The report is satisfactory.
<b>Consultees:</b>	<ul style="list-style-type: none"> <li>• Senior Leadership Team</li> </ul>
<b>Background Papers:</b>	<ul style="list-style-type: none"> <li>• 2026/27 Draft Revenue Budget and Medium-Term Financial Plan update - PFD 2 December 2025</li> </ul>
<b>Appendices:</b>	<ol style="list-style-type: none"> <li>1. General Fund Budget Summary (2026/27)</li> <li>2. Budget Changes 2025/26 to 2026/27</li> <li>3. Statement of Movement on Reserves</li> <li>4. Fees &amp; Charges (2026/27)</li> <li>5. Capital Programme (2026/27)</li> </ol>

## 1. Introduction

- 1.1 The Draft General Fund and Housing Revenue Account budgets, Capital Programme and updated MTFP were considered by this committee on the 2 December 2025.
- 1.2 This report summarises the changes for the final budget 26/27 for the General Fund, Housing Revenue Account and Capital programmes, the details of the provisional finance

settlement and Fees and Charges schedule for 26/27. The budget will be updated week commencing 9 February 2026 when the government is due to release the final settlement statement. The final budget will be presented at Full Council on 20 February 2026.

- 1.3 The aim of the General Fund and Housing Revenue Account (HRA) budgets and the associated MTFP is to achieve:

- Financial resilience
- Financial self-sustainability

The achievement of both will provide opportunities for the council to invest in strategic priorities.

- 1.4 The preparation of the budget for 26/27 has been a detailed process involving officer review and Member consultations.

## 2. The General Fund Budget

- 2.1 The final general fund budget, taking into account establishment increases, estimated pay award, inflation assumptions, contract inflation and other known changes is £9,131,657 an increase of £1.398M from the previous year's budget.

- 2.2 The General Fund Budget detail is shown at **Appendix 1**.

- 2.3 **Table 1** below shows the changes from the approved budget for 2025/26 and the proposed final budget for 2026/27.

**Table 1**

General Fund	Budget 2025/26	Final Budget 26/27	Variance
	£	£	£
Employee Expenses	8,254,125	9,121,440	867,315
Premises Expenses	663,500	700,195	36,695
Transport Expenses	295,103	328,850	33,747
Supplies & Services	2,372,017	2,830,054	458,037
Transfer Payments	7,290,954	6,855,317	(435,637)
Income	(12,084,417)	(11,618,800)	465,617
Capital Financing	941,500	914,600	(26,900)
<b>Net Revenue Expenditure</b>	<b>7,732,782</b>	<b>9,131,657</b>	<b>1,398,875</b>

- 2.4 Employee expenses are the most significant movement between years. This is due to the additional staff required to deliver the food waste project and a 3% assumed pay award that has been built in for 26/27.
- 2.5 Inflationary increases have been applied to Supplies and Services, Premises Expenses and Contracts where required.
- 2.6 In addition, Oadby and Wigston Borough Council are part of three partnership agreements which include Lightbulb, Leicestershire Building Control and Health and Wellbeing and Physical Activity. These partnerships are run on our behalf and other local authorities by Blaby District Council. The ongoing costs of the partnership have been built into the budget



for 2026/27. Due to Local Government Reorganisation (LGR), Blaby District Council have requested that we extend the current S113 agreements to the 31 March 2028 to align with the LGR timetable. We support this request and have included the costs of the partnership within the budget and MTFP. By agreeing to the budget Members are endorsing the continuation of these partnership arrangements.

- 2.7 Income has been adjusted to reflect achievable budgets where required. The majority of fees and charges have been increased in line with September 2025 CPI @ 3.8%, with the exception of car parks where a 10% (rounded) increase has been proposed and garden waste charges which have been frozen. Other fees and charges may see slightly higher than the CPI increase due to benchmarking with neighbouring authorities and full cost recovery exercises.

### **3. The Provisional Final Settlement**

- 3.1 The government announced the provisional multi-year settlement on 17 December 2025 for 2026/27 to 2028/29. This settlement will result in more distribution of funding within the sector than any other for at least the last 25 years.
- 3.2 Added to this there has been a full baseline reset with major changes to the relative needs formulas and the simplification of many grants into either SFA or one of four consolidated grants.
- 3.3 This is a 3-year settlement, which gives some certainty for the years to 2028/29, however each of these years will be subject to an annual settlement process. Any changes will be upwards as the 3-year settlement represents a minimum level of funding.
- 3.4 A key assumption within the settlement is that Council Tax will increase by the maximum of 2.99% or £5.
- 3.5 Grants have been allocated within 4 main grants streams – homelessness, rough sleeping and domestic abuse grant, public health grant, crisis and resilience grant and children and families grant.

### **4. Council Tax 2026/27**

- 4.1 The MTFP assumes a Council tax increase in line with the maximum allowed under the Local Government Settlement which is the great of £5 or 2.99%. This equates to an additional £145k of funding to support essential services.
- 4.2 The tax base for 2026/26 is 19,004.95 an increase of 410.76 properties when compared to last year. This equates to an additional £111k of funding.
- 4.3 Any surplus/deficit on Council tax during 25/26 will affect the Council Tax precepts for 26/27; the current forecast is a surplus of £25k.
- 4.4 The proposed Council Tax bandings are set out in the table below and full details are contained in the Council Tax Setting Report included in the Full Council agenda.

<b>Total Amount Payable by Band</b>			
<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>
£179.64	£209.58	£239.52	£269.46
<b>E</b>	<b>F</b>	<b>G</b>	<b>H</b>
£329.34	£389.22	£449.10	£538.93

## 5. Business Rates (NNDR) 2026/27

- 5.1 Under the previous arrangements for Retained Business Rates, where a Council collects rates above an assessed baseline level set by the Government, a 50% levy was applied that was paid to Government. In order to avoid this levy a Business Rates Pool was adopted with the County and other Districts in Leicestershire.
- 5.2 Between 2013/14 and 2025/26, business rates pooling arrangements have delivered positive outcomes across England. Local authorities collectively retained a greater share of business rates growth by reducing the levy that would otherwise have been payable to Central Government. This approach enabled participating authorities to benefit from local economic growth and strengthen financial resilience, however, the reset of the Business Rate Retention Scheme in 2026/27 will introduce revised baseline targets for each authority. These targets will be uplifted to reflect actual conditions, effectively removing any growth from the system. As a result, there will be no levy payable and consequently, no financial advantage from pooling arrangements.
- It is therefore anticipated that business rate pools will not operate in England from 2026/27 onwards. This position is supported by external advisors and aligns with expectations from the Ministry of Housing, Communities and Local Government (MHCLG).
- 5.3 The Council is still expecting a number of rateable values appeals. A provision has been put aside based on intelligence from the Councils advisors to cover the estimated effects, but uncertainty remains in this area.
- 5.4 As well as the potential for the authority to attract additional income through retained business rates there is also the risk of uncertainty through the amount of business rates that it collects; this has been further exacerbated by economic impacts. Coupled with uncertainties relating to appeals against rateable values for business premises, with the potential for successful appeals being backdated, makes estimating income extremely challenging and potentially volatile.
- 5.5 The table below provides details of the anticipated business rates figure for 2026/27.

	<b>2026/27</b>
<b>Business Rates income/Expenditure</b>	<b>£</b>
Retained Business Rates	(5,522,665)
S31 Grants	(1,956,868)
Tariff	5,488,784
<b>Pre-Levy Income</b>	<b>(1,990,749)</b>
levy	58,061
Renewable Energy	(8,564)
<b>Net Retained Business Rates Income</b>	<b>(1,941,252)</b>

## 6. Funding Position 2026/27

- 6.1 The overall funding position including final settlement for 2026/27 is set out in **Table 2**

(Continued overleaf)

**Table 2 – 2026/27 Final Budget Funding Position**

	<b>Funding 25/26</b>	<b>Funding 26/27</b>
	£	£
Earmarked Reserves	514,239	479,000
Retained Business Rates	(2,434,256)	(1,941,252)
Collection Fund (Surplus)/Deficit – BR	178,840	(210,577)
Extended Producer Responsibility	(855,239)	(874,972)
NI increase funding	(72,628)	0
New Homes Bonus	(236,500)	0
Council Tax – OWBC	(4,864,982)	(5,121,130)
Collection Fund Balance – Council Tax	(56,245)	(25,130)
Revenue Support Grant	0	(1,768,240)
Green Plant and machinery	(7,351)	0
<b>Total Financing</b>	<b>(7,834,122)</b>	<b>(9,462,301)</b>

## 7. General Fund Reserves

- 7.1 The forecast position for the General Fund Reserve is shown in Table 3.
- 7.2 Closing balances are forecast to increase over the lifetime of the MTFP, reflecting the increased funding derived from the Fair Funding Review.

**Table 3**

<b>General Fund Reserve</b>	<b>£</b>
<b>Opening Balance 01/04/2025</b>	<b>(1,422,408)</b>
Forecast overspend for 2025/26 as at Quarter 3	454,000
Estimated return from Business rates pool 25/26	(538,000)
<b>Estimated Closing Balance 31 March 2026</b>	<b>(1,506,408)</b>
Estimated surplus for 26/27 per MTFP	(330,645)
<b>Estimated Closing Balance 31 March 2027</b>	<b>(1,837,053)</b>
Estimated surplus for 27/28 per MTFP	(12,670)
<b>Estimated Closing Balance 31 March 2028</b>	<b>(1,849,722)</b>

## 8. Scale of Fees and Charges

- 8.1 The Council charges for a number of its services that are provided to the public. All fees and charges are reviewed on an annual basis as part of the budget process. Charges set by the Council are increased in line with inflation or other factors taken into consideration, in line with the Corporate Charging Policy:

- Statutory obligations
- Policies objectives of the Council
- Local market research and competition (where relevant)

- The impact of price changes on activity level of demand
- Changes in taxation
- Budget position and any associated gap
- The cost of providing the service

8.2 Through member consultation it is proposed to increase all discretionary fees and charges by inflation as a minimum, which at September 2025 was 3.8% with the exception of Car Parking fees which are to increase by 10% (rounded), garages rent by 4.8% and Garden Waste where the charge for the first bin has been frozen. Other fees and charges may see slightly higher than the CPI increase due to benchmarking with neighbouring authorities and full cost recovery exercises. Included at **Appendix 4** is the final proposed charge position of individual fees and charges showing previous charges and the % of increase. It is recommended that Council approves the increase in Discretionary Fees and Charges by September's inflation going forwards each year.

8.3 **Table 4** shows the movement in fees and charges.

**Table 4 – General Fund Fees & Charges Budget 2026/27**

General Fund	Budget 2025/26	Final Budget 26/27	Variance
	£	£	£
Fees & Charges	(3,569,240)	(3,723,890)	(154,650)

## 9. Housing Revenue Account 2026/27

9.1 **Table 5** shows the 2025/26 revised budget and the final 2026/27 proposed budget for the HRA.

**Table 5 - Housing Revenue Account Final Budget 2026/27**

Housing Revenue Account	Revised Budget 2025/26	Budget 26/27	Variance
	£	£	£
Employee Expenses	1,177,400	1,387,450	210,050
Premises Expenses	1,228,100	1,362,000	133,900
Supplies and Services	269,300	248,900	(20,400)
Interest payable/(receivable)	761,400	776,900	15,500
Depreciation	1,580,000	1,550,000	(30,000)
Corporate overheads	1,391,300	1,426,000	34,700
Income	(6,164,600)	(6,450,100)	(285,500)
Capital appropriation	(171,500)	(173,100)	(1,600)
Contribution from reserves	(71,400)	(128,050)	(56,650)
<b>Net Revenue Expenditure</b>	<b>0</b>	<b>0</b>	<b>0</b>

9.2 The budget for 26/27 is £128k deficit which is £57k more than 25/26. This will be met from the HRA Reserve.

- 9.3 The assumption for the housing rents is an increase of 4.8%, in line with the national rent increase formula of CPI in September (3.8%) + 1%.
- 9.4 Employee expenses have increased by £210k. This is due to three new posts; Asset Management and Information Officer, Housing Inspector – Damp and Mould, and Compliance Assistant, along with a 3% assumption for the pay award. These posts are required due to work related to the Regulation of Social Housing inspection.

### **Rent Convergence**

- 9.5 Rent convergence is being reintroduced nationally as part of the new 10-year rent settlement commencing from April 2026. The purpose of convergence is to bring rents for existing social housing properties back in line with their respective formula rent levels, addressing historic disparities where comparable properties are let at different rents. These differences have built up over time following the suspension of convergence in 2015, meaning that many long-standing tenancies now sit below the benchmark rent for comparable properties.
- 9.6 Formula rent provides a consistent and transparent basis for setting social rents, reflecting property type and local earnings. While annual rent increases have continued in recent years on an inflation-linked basis, the absence of convergence has resulted in rents drifting further away from formula levels. Reintroducing convergence is therefore intended to correct this and bring those properties which are on social rent up to formula rents.
- 9.7 Under the proposed framework, annual rent increases would continue to be capped at CPI+ 1%, with an additional uplift applied to properties that are currently below formula rent until parity is reached. This approach is designed to be gradual and predictable, avoiding sudden increases for tenants while allowing landlords to move rents towards target levels over time. Once convergence is achieved, rents would revert to standard annual increases only.
- 9.8 From a HRA perspective, rent convergence strengthens the long-term sustainability of rental income. Bringing rents closer to formula levels improves the underlying income base, supporting investment in existing stock, building safety and long-term asset management, while also providing greater certainty for financial planning. At the same time, the phased nature of convergence helps balance financial sustainability with affordability considerations for tenants, ensuring that changes are implemented in a controlled and proportionate manner.

## **10. HRA Medium Term Financial Plan**

- 10.1 The forecast position for the General Fund Reserve is shown in Table 6.

**Table 6 – HRA Reserve**

<b>HRA Reserve</b>	<b>£</b>
<b>Opening Balance 01/04/2025</b>	<b>(1,674,678)</b>
Estimated deficit for 2025/26 per MTFP	<b>71,400</b>
<b>Estimated Closing Balance 31 March 2026</b>	<b>(1,603,278)</b>
Estimated deficit for 2026/27 per MTFP	<b>446,056</b>
<b>Estimated Closing Balance 31 March 2027</b>	<b>(1,157,222)</b>
Estimated surplus for 2027/28 per MTFP	<b>(62,267)</b>
<b>Estimated Closing Balance 31 March 2028</b>	<b>(1,219,489)</b>

- 10.2 The HRA Medium Term Financial Plan 2026/27 to 2030/31 as shown in **Table 7** forecasts a surplus for each year of the MTFP except 2026/27.

**Table 7 - HRA MTFP**

	2026/27	2027/28	2028/29	2029/30	2030/31
<b>Expenditure</b>					
Supervision and Management	1,012,990	957,630	885,670	903,310	921,060
Repairs and Maintenance	1,595,860	1,653,250	1,472,100	1,501,550	1,531,500
Rent Rates and Other Charges	176,400	183,100	187,670	191,430	195,260
Provision for Bad Debt	30,000	31,140	31,920	32,560	33,210
Depreciation	1,550,000	1,581,000	1,613,000	1,645,000	1,678,000
Debt Management Expenses	10,000	10,380	10,640	10,850	11,070
	<b>4,375,250</b>	<b>4,416,500</b>	<b>4,201,000</b>	<b>4,284,700</b>	<b>4,370,100</b>
<b>Income</b>					
Dwelling rents	-6,199,600	-6,519,200	-6,820,900	-7,103,800	-7,382,400
Non-Dwelling rents	-1,600	-1,700	-1,800	-1,900	-2,000
Charges for Services and Facilities	-248,900	-259,100	-268,200	-276,900	-286,000
	-	-	-	-	-
	<b>6,450,100</b>	<b>6,780,000</b>	<b>7,090,900</b>	<b>7,382,600</b>	<b>7,670,400</b>
<b>Net (income)/cost of services</b>	-	-	-	-	-
	<b>2,074,850</b>	<b>2,363,500</b>	<b>2,889,900</b>	<b>3,097,900</b>	<b>3,300,300</b>
Interest payable	806,900	815,500	812,400	841,000	849,100
Investment income	-30,000	-30,000	-30,000	-30,000	-30,000
Corporate and Democratic Core	1,426,000	1,480,000	1,517,000	1,547,000	1,578,000
<b>Net Operating Expenditure</b>	<b>128,050</b>	<b>-98,000</b>	<b>-535,700</b>	<b>-685,000</b>	<b>-848,300</b>
Capital Funded from Revenue	318,006	35,733	0	209,048	180,033
<b>Appropriations to/(from) reserves</b>	<b>-446,056</b>	<b>62,267</b>	<b>535,700</b>	<b>475,952</b>	<b>668,267</b>

## 11. Capital Programme 2026/27

- 11.1 The capital programme for 2026/27, and an indicative capital programme from 2027/28 to 2030/31, are shown in **Appendix 5**. The impact of this is incorporated into the capital financing charges included in the MTFP.
- 11.2 A number of capital bids have been prepared as part of the budget setting process. The capital bids received do not identify any funding. This means they would be required to be funded through 'prudential borrowing' or capital receipts. It is intended that they will be financed from capital receipts expected from the sale of Bushloe House and Oadby Pool.
- 11.3 Stock condition survey data forms the basis of the HRA capital programme for the next thirty years. The following items are proposed for the HRA capital programme for 26/27;

### Decent Homes Works - £2.330M

Planned investment focuses on maintaining Decent Homes standards and addressing key building components, including central heating systems, doors & windows, kitchens and bathrooms, roofing and fire safety works. Annual funding is also allocated for aids and adaptations, damp and mould works and housing block improvements.

### New Housing Initiatives - £2.213M

A scheme to help increase the availability of good quality, permanent homes within HRA stock. Growing demand for social housing, rising homelessness pressures and limited

turnover mean that current supply is not sufficient to meet demand. By purchasing additional properties the council can provide more households with safe, stable accommodation more quickly than through new developments. Expanding the stock in this way also strengthens the council's ability to respond flexibly to changing local housing pressures.

11.4 Capital bids received for the General Fund are outlined below;

#### **Vehicle Refurbishment and Replacement - £285K**

A refuse collection vehicle has reached the end of its life and requires replacement. Another will have its life extended two years through refurbishment. This is in line with the 10-year replacement plan that was approved as part of the 25/26 budget setting process.

#### **Boiler Replacement at Parklands Leisure Centre - £118K**

To replace the existing two aging main gas boilers with smaller modular boilers, and a like-for-like replacement of the hot water heater, with provisions to allow future connection to the already installed PV panels. The existing units, installed during the 2015 refurbishment, are becoming increasingly inefficient and prone to maintenance issues. These upgrades will deliver improved energy efficiency, reduce operational risks and enhance the overall resilience of the Centre's heating and hot water systems.

#### **Replacement of Play Park Equipment - £245K**

To replace play equipment that is at the end of its useful life.

#### **Pavillion/Community Building Refurbishment - £68.5k**

Capital refurbishment works across multiple buildings, most notably Uplands Park Pavillion.

#### **IT Replacements – £66K**

The Council started the journey to move its IT services in house in late 2020 and the project transition phase was completed in 2021. There has been no requirement since for capital investment in any hardware however, we have now entered the period where physical hardware that is due to be end of life will need replacing. This process began in 2025/26 and will continue through 2026/27 and future years.

This is to replace end of life or damaged equipment across the following key areas:

- Laptop Replacement – 25% of workforce
- Mobile Phones – 50% of workforce
- Apple Mac Mini – to manage Apple products across the whole estate
- Server room replacement and maintenance
- Accessories – replace keyboards, mouse and/or other minor end user devices.

#### **Footfall Counter - £14K**

The is an invest to save project to replace the existing footfall counters in the three town centres with a replacement with lower running costs. This should save circa £8K per year.

#### **Christmas Decorations - £8K**



New electricity points are needed to ensure lights continue to operate as the network of electrical points installed is now at capacity; additional icicle lights are needed to cover areas that have not already been covered.

#### **Litter Bins - £22K**

To replace approximately 40 litter bins and 20 dog waste bins across the borough that have come to the end of their life.

#### **Refuse Bins - £42K**

To purchase stock of spare bins that are used to replace damaged, lost or stolen bins as per the kerbside collection policy.

### **12. Medium Term Financial Plan 2026/27 to 2030/31**

- 12.1 The MTFP has been updated to reflect the on-going impact of the changes made to the 2025/26 budget and to include the latest funding forecasts following the provisional settlement and is shown below in **Table 8**.
- 12.2 **Table 8** below demonstrates the budget position from 2026/27 to 2030/31 and its effect on the General fund reserve balance. It does not apply any annual increases in fees and charges but does assume a 2.99% increase in Council Tax.
- 12.3 Annual pay inflation is assumed at 3% for 2026/27 and 2% thereafter. Supplies and services are subject to a 2% annual uplift, while utilities and insurance are subject to 5%, reflecting a long-term trend for increases greater than general inflation in those areas.

**Table 8 – General Fund MTFP**

	2026/27	2027/28	2028/29	2029/30	2030/31
	£	£	£	£	£
Salaries	9,294,390	9,568,033	9,849,886	10,140,194	10,439,211
Supplies & Services	3,034,050	2,480,278	2,527,646	2,575,962	2,625,244
Utilities	190,930	200,477	210,500	221,025	232,077
Insurances	273,240	286,902	301,247	316,309	332,125
Capital	914,600	943,700	1,020,900	1,082,000	1,095,800
Income	(3,694,554)	(3,586,943)	(3,639,157)	(3,692,415)	(3,746,738)
Selective Licensing	(403,000)	(200,000)	(150,000)	(100,000)	(450,000)
Leisure Management	(478,000)	(478,000)	(478,000)	(478,000)	(478,000)
<b>Net cost of Services</b>	<b>9,131,657</b>	<b>9,214,446</b>	<b>9,643,022</b>	<b>10,065,076</b>	<b>10,049,719</b>
Earmarked Reserves	479,000	655,000	395,000	225,000	605,000
Retained Business Rates	(1,941,252)	(1,992,768)	(2,044,953)	(2,097,810)	(2,151,347)

Collection Fund (Surplus)/Deficit – BR	(210,577)	0	0	0	0
Extended Producer Responsibility	(874,972)	(874,972)	(699,978)	(559,982)	(447,986)
Council Tax – OWBC	(5,121,130)	(5,319,386)	(5,563,335)	(5,810,481)	(6,074,214)
Collection Fund Bal – CTax	(25,130)	0	0	0	0
Revenue Support Grant	(1,768,240)	(1,869,984)	(1,959,937)	(2,013,479)	(2,068,660)
<b>Total Funding</b>	<b>(9,462,301)</b>	<b>(9,227,116)</b>	<b>(9,733,207)</b>	<b>(10,144,756)</b>	<b>(10,047,610)</b>
<b>Budget Gap/(Surplus)</b>	<b>(330,645)</b>	<b>(12,670)</b>	<b>(90,184)</b>	<b>(79,681)</b>	<b>2,109</b>
<b>General Fund Balance</b>	<b>(1,837,053)</b>	<b>(1,849,722)</b>	<b>(1,939,907)</b>	<b>(2,019,587)</b>	<b>(2,017,479)</b>

The table shows the increasing levels of reserves over the term of the MTFP.

#### 12.4 Robustness of Estimates and Adequacy of Reserves (Section 25 Statement)

It has been well established that balancing budgets and closing budget gaps through the utilisation of reserves is not sustainable and the Council needs to manage its expenditure within its funding and income means. This issue has been highlighted by the council's external auditors, Grant Thornton UK LLP.

- 12.5 At the Audit Committee meeting on 9 December 2025, Grant Thornton delivered their Provisional Annual Report for 2024/25 with the final report received on the 19 December 2025.
- 12.6 The 2024/25 Auditors Annual report has identified no significant weaknesses with our financial sustainability and has one improvement recommendation in terms of addressing any future budget gaps. This is a significant improvement on the 2023/24 report which had recommendations regarding the large budget gaps in the MTFP and how we were going to need to address the issues. Officers and members have made huge strides to improve the financial sustainability of the Council with long term savings plans implemented and further work still ongoing.
- 12.7 It is of fundamental importance that Members remain focused on the pledge not to use reserves to balance the budget and for Officers and Members to work collectively to continue to identify sustainable cost savings.
- 12.8 The Local Government Act 2003 requires the Council's Chief Financial Officer (Section 151 Officer) to comment on the robustness of the estimates and also on the adequacy of the proposed reserves. Members must have regard to these comments when deciding on the budget proposals for the forthcoming year.
- 12.9 The Section 151 Officer considers that the estimates which form the General Fund and Housing Revenue Account are robust and prudent and the proposals are deliverable for 2026/27, however it is essential that members, officers and staff maintain the momentum to continue to find savings in the long term.
- 12.10 It is noted that Council considered as part of the draft budget, increasing council tax by the maximum level available, representing 2.99%. This is a prudent decision given the government funding position.

- 12.11 The budget for 2026/27 shows no use of the general fund reserve to balance the budget as per the recommendation approved by Full Council at the meeting on the 12 December 2023.
- 12.12 There is no set formula for deciding what level of reserves is appropriate and councils are free to determine the level of reserves they hold. Where councils hold very low reserves there is little resilience to financial shocks and sustained financial challenges. It is proposed that any funding surplus is put into balances and reserves to rebuild levels and create resilience for the Council, placing O&W in a good financial position for Local Government Reorganisation.
- 12.13 The forecast general fund reserve position is set out at paragraph 6.1 in the report; this forecasts the closing reserves to be £1.837M at March 2026. The current level of reserves is forecast to be approximately 20% of the net revenue budget. It is felt that this is a reasonable level of reserve provision, and so this will be maintained over the duration of the MTFP, resulting in an increase in the absolute balance of £0.511M over the period. The remaining £2.76M surplus that has been forecast during the MTFP will be split 50:50 between the contingency reserve and a new LGR reserve, reflecting the uncertainty around the transition costs.
- 12.14 Added to the general reserves position, there is also a need to bolster more specific and earmarked reserves, which are only used for their identified purposes, from a Risk Management perspective. These include a specific reserve for NNDR/Business Rates equalisation reserve, due to the uncertainties around calculations with the Business Rates Retention Scheme and for areas such as Invest to Save schemes whereby formally approved income generating schemes can be initiated creating savings in the future.
- 12.15 Changes in grant funding present a further significant risk to the Council; the Section 151 Officer continues to work with key sector representatives to raise the profile of the unique issues faced by the Council and lobby for more financial freedoms around council tax precept levels and currently heavily regulated income streams.
- 12.16 The Housing Revenue Account position remains in a sustainable position. Financial risks exist around rising interest rates and the fact that the service needs to refinance debt on a regular basis and is therefore exposed to further increases in this regard; the need to decarbonise stock and the associated financial burden this presents; ongoing volatility in respect of energy costs which are highly susceptible to economic conditions; the level of properties sold through right to buy; additional burdens associated with new decency standards. Rent convergence (see paras 9.5-9.8) will be pivotal to meeting these financial challenges.

BUDGET PAPERS 2026/27

Revised Budget 2024/25	Actuals 2024/25	Variance 2024/25	Service	Original Budget 2025/26	Adjustments to Budget	Revised Budget 2025/26	Reverse 2025/26 Adjustments to Budget	2026/27 Base Budget	2026/27 Savings Plan	2026/27 Permenant Growth	2026/27 Inflationary Growth	2026/27 Salaries	2026/27 One-Off Growth & Savings	2026/27 Virement	2026/27 Proposed Budgets
				£	£	£	£	£	£	£	£	£	£	£	£
396,420	337,059	(59,361)	Senior Leadership Team	378,400	0	378,400	0	378,400	(2,400)	5,000	0	59,290	0	(20,000)	420,290
3,775,267	4,155,780	380,513	Finance , Law & Democracy	3,361,324	0	3,361,324	0	3,361,324	(1,806,417)	1,428,720	68,020	191,450	6,900	28,000	3,277,997
1,085,748	637,338	(448,410)	The Built Environment	1,229,914	(84,820)	1,145,094	0	1,145,094	(459,674)	461,680	955	376,310	130,000	88,100	1,742,465
1,464,385	2,522,989	1,058,604	Neighbourhood Services	1,669,865	89,620	1,759,485	72,100	1,831,585	(122,100)	112,545	11,250	505,500	0	0	2,338,781
1,388,938	1,476,410	87,472	Policy, Performance & Transformation	1,510,382	600	1,510,982	800	1,511,782	(7,000)	67,098	15,540	251,220	77,090	0	1,915,730
(1,364,003)	(1,341,881)	22,122	HRA Recharge	(1,364,003)	0	(1,364,003)	0	(1,364,003)	(26,103)	0	0	0	0	(88,100)	(1,478,206)
948,600	0	(948,600)	Capital Financing	941,500	0	941,500	0	941,500	(26,900)	0	0	0	0	0	914,600
7,695,355	7,787,696	92,341	NET COST OF SERVICES	7,727,382	5,400	7,732,782	72,900	7,805,682	(2,450,594)	2,075,043	95,765	1,383,770	213,990	8,000	9,131,657

## Appendix 2

Senior Leadership Team	Budget 2025/26	Draft Budget 26/27	Variance
	£	£	£
Employee Expenses	373,950	432,540	58,590
Premises Expenses	1,000	500	(500)
Transport Expenses	500	300	(200)
Supplies & Services	2,950	6,950	4,000
Transfer Payments	0	0	0
Income	0	(20,000)	(20,000)
Capital Financing	0	0	0
<b>Net Revenue Expenditure</b>	<b>378,400</b>	<b>420,290</b>	<b>41,890</b>

Finance , Law & Democracy	Budget 2025/26	Draft Budget 26/27	Variance
	£	£	£
Employee Expenses	2,875,450	2,433,270	(442,180)
Premises Expenses	4,800	2,800	(2,000)
Transport Expenses	5,853	24,900	19,047
Supplies & Services	(58,783)	41,404	100,187
Transfer Payments	6,893,454	6,457,817	(435,637)
Income	(7,723,453)	(7,072,300)	651,153
Capital Financing	941,500	914,600	(26,900)
<b>Net Revenue Expenditure</b>	<b>2,938,821</b>	<b>2,802,491</b>	<b>(136,330)</b>

The Built Environment	Budget 2025/26	Draft Budget 26/27	Variance
	£	£	£
Employee Expenses	1,158,295	1,509,690	351,395
Premises Expenses	164,600	203,900	39,300
Transport Expenses	1,600	1,600	0
Supplies & Services	1,198,273	1,475,385	277,112
Transfer Payments	397,500	397,500	0
Income	(1,775,174)	(1,933,710)	(158,536)
Capital Financing	0	0	0
<b>Net Revenue Expenditure</b>	<b>1,145,094</b>	<b>1,654,365</b>	<b>509,271</b>

Neighbourhood Services	Budget 2025/26	Draft Budget 26/27	Variance
	£	£	£
Employee Expenses	2,429,500	3,097,700	668,200
Premises Expenses	483,600	487,695	4,095
Transport Expenses	286,400	301,300	14,900
Supplies & Services	383,575	402,775	19,200
Transfer Payments	0	0	0
Income	(1,823,590)	(1,950,690)	(127,100)
Capital Financing	0	0	0
<b>Net Revenue Expenditure</b>	<b>1,759,485</b>	<b>2,338,781</b>	<b>579,296</b>

Policy, Performance & Transformation	Budget 2025/26	Draft Budget 26/27	Variance
	£	£	£
Employee Expenses	1,416,930	1,648,240	231,310
Premises Expenses	9,500	5,300	(4,200)
Transport Expenses	750	750	0
Supplies & Services	846,002	903,540	57,538
Transfer Payments	0	0	0
Income	(762,200)	(642,100)	120,100
Capital Financing	0	0	0
<b>Net Revenue Expenditure</b>	<b>1,510,982</b>	<b>1,915,730</b>	<b>404,748</b>

General Fund	Budget 2025/26	Draft Budget 26/27	Variance
	£	£	£
Employee Expenses	8,254,125	9,121,440	867,315
Premises Expenses	663,500	700,195	36,695
Transport Expenses	295,103	328,850	33,747
Supplies & Services	2,372,017	2,830,054	458,037
Transfer Payments	7,290,954	6,855,317	(435,637)
Income	(12,084,417)	(11,618,800)	465,617
Capital Financing	941,500	914,600	(26,900)
<b>Net Revenue Expenditure</b>	<b>7,732,782</b>	<b>9,131,657</b>	<b>1,398,875</b>

**Statement of Movement on Reserves**

	Opening Balance at 1st April 2025	Additions in 2025/26	Useage in 2025/26	Closing Balance as at 31 March 2026	Additions in 2026/27	Useage in 2026/27	Closing Balance as at 31 March 2027	Movements in 2027/28	Closing Balance as at 31 March 2028	Movements in 2028/29	Closing Balance as at 31 March 2029	Movements in 2029/30	Closing Balance as at 31 March 2030	Movements in 2030/31	Closing Balance as at 31 March 2031	
	£															
	<b>General Fund Earmarked Reserves</b>															
90017 7751	Contingency Reserve	(139,207)		(139,207)	(370,000)		(509,207)	(345,000)	(854,207)	(215,000)	(1,069,207)	(130,000)	(1,199,207)	(320,000)	(1,519,207)	
90019 7751	Budget C/F Reserve	(50,613)		(50,613)			(50,613)		(50,613)		(50,613)		(50,613)		(50,613)	
90038 7751	Land Valuation Reserve	(1,000)		(1,000)			(1,000)		(1,000)		(1,000)		(1,000)		(1,000)	
90045 7751	Local Elections Reserve	(17,500)		(17,500)			(17,500)		(17,500)		(17,500)		(17,500)		(17,500)	
90047 7751	GF Cost Of Living Reserve	(41,738)		(41,738)			(41,738)		(41,738)		(41,738)		(41,738)		(41,738)	
90049 7751	Lottery Reserve	(11,708)		(11,708)			(11,708)		(11,708)		(11,708)		(11,708)		(11,708)	
90015 7751	Local Plan Reserve	(429,406)		(429,406)		110,000	(319,406)		(319,406)		(319,406)		(319,406)		(319,406)	
	LGR Reserve	0		0	(370,000)		(370,000)	(345,000)	(715,000)	(215,000)	(930,000)	(130,000)	(1,060,000)	(320,000)	(1,380,000)	
	EPR Reserve	0	(855,239)	(855,239)			(855,239)		(855,239)		(855,239)		(855,239)		(855,239)	
	<b>Total GF</b>	<b>(691,172)</b>	<b>(855,239)</b>	<b>0</b>	<b>(1,546,411)</b>	<b>(740,000)</b>	<b>110,000</b>	<b>(2,176,411)</b>	<b>(690,000)</b>	<b>(2,866,411)</b>	<b>(430,000)</b>	<b>(3,296,411)</b>	<b>(260,000)</b>	<b>(3,556,411)</b>	<b>(640,000)</b>	<b>(4,196,411)</b>
	<b>General Fund Grants</b>															
90044 7751	Collection Fund Reserve	0		0			0		0		0		0		0	
90046 7751	Business Rates Retention Reserve	(382,358)		(76,358)			(76,358)		(76,358)		(76,358)		(76,358)		(76,358)	
90013 7751	Earmarked Revenue Grants Reserve	(235,751)	(116,000)	(351,751)		116,000	(235,751)		(235,751)		(235,751)		(235,751)		(235,751)	
90027 7751	Grounds Maintenance Reserve Balance	(413,907)		(378,907)		35,000	(343,907)	35,000	(308,907)	35,000	(273,907)	35,000	(238,907)	35,000	(203,907)	
	<b>Total GF Grants</b>	<b>(1,032,017)</b>	<b>(116,000)</b>	<b>341,000</b>	<b>(807,017)</b>	<b>0</b>	<b>151,000</b>	<b>(656,017)</b>	<b>35,000</b>	<b>(621,017)</b>	<b>35,000</b>	<b>(586,017)</b>	<b>35,000</b>	<b>(551,017)</b>	<b>35,000</b>	<b>(516,017)</b>
90001 7751	<b>General Fund Reserve</b>	<b>(1,422,408)</b>		<b>(84,000)</b>	<b>(1,506,408)</b>	<b>(330,645)</b>	<b>(1,837,053)</b>	<b>(12,670)</b>	<b>(1,849,722)</b>	<b>(90,184)</b>	<b>(1,939,907)</b>	<b>(79,681)</b>	<b>(2,019,587)</b>	<b>2,109</b>	<b>(2,017,479)</b>	
	<b>Total General Fund Revenue Reserves</b>	<b>(3,145,597)</b>	<b>(971,239)</b>	<b>257,000</b>	<b>(3,859,836)</b>	<b>(1,070,645)</b>	<b>261,000</b>	<b>(4,669,481)</b>	<b>(667,670)</b>	<b>(5,337,151)</b>	<b>(485,184)</b>	<b>(5,822,335)</b>	<b>(304,681)</b>	<b>(6,127,016)</b>	<b>(602,891)</b>	<b>(6,729,907)</b>
90005 7751	<b>General Fund Capital Receipts Reserve</b>	<b>(61,844)</b>	<b>(4,150,000)</b>	<b>1,832,914</b>	<b>(2,378,930)</b>	<b>800,309</b>	<b>(1,578,621)</b>	<b>307,500</b>	<b>(1,271,121)</b>	<b>823,500</b>	<b>(447,621)</b>	<b>393,500</b>	<b>(54,121)</b>	<b>0</b>	<b>(54,121)</b>	
	<b>HRA Revenue Reserves</b>															
90009 7751	Major Repairs Reserve Balance	(630,297)	(1,550,000)	1,238,203	(942,094)	(1,581,000)	2,523,094	(0)	(0)		(0)		(0)		(0)	
90011 7751	Regeneration Reserve	(361,443)		361,443	0		0	0	0		0		0		0	
90042 7751	Budgets Carried Forward HRA Reserve Balance	(8,500)		8,500	0		0	0	0		0		0		0	
90048 7751	HRA Cost Of Living Reserve	(50,000)		(50,000)			(50,000)		(50,000)		(50,000)		(50,000)		(50,000)	
	<b>Total HRA</b>	<b>(1,050,240)</b>	<b>(1,550,000)</b>	<b>1,608,146</b>	<b>(992,094)</b>	<b>(1,581,000)</b>	<b>2,523,094</b>	<b>(50,000)</b>	<b>0</b>	<b>(50,000)</b>	<b>0</b>	<b>(50,000)</b>	<b>0</b>	<b>(50,000)</b>	<b>0</b>	<b>(50,000)</b>
90002 7751	<b>HRA Reserve</b>	<b>(1,674,678)</b>		<b>71,400</b>	<b>(1,603,278)</b>	<b>446,056</b>	<b>(1,157,222)</b>	<b>(62,267)</b>	<b>(1,219,489)</b>	<b>(535,700)</b>	<b>(1,755,189)</b>	<b>(475,952)</b>	<b>(2,231,141)</b>	<b>(668,267)</b>	<b>(2,899,408)</b>	
	<b>Total HRA</b>	<b>(2,724,918)</b>	<b>(1,550,000)</b>	<b>1,679,546</b>	<b>(2,595,372)</b>	<b>(1,581,000)</b>	<b>2,969,150</b>	<b>(1,207,222)</b>	<b>(62,267)</b>	<b>(1,269,489)</b>	<b>(535,700)</b>	<b>(1,805,189)</b>	<b>(475,952)</b>	<b>(2,281,141)</b>	<b>(668,267)</b>	<b>(2,949,408)</b>
	<b>HRA Capital Reserves</b>															
90005 7751	HRA Capital Receipts Reserve	(296,918)		(296,918)			(296,918)		(296,918)		(296,918)		(296,918)		(296,918)	
90012 7751	1-4-1 Housing Reserve	(1,421,450)	(1,776,000)	(3,197,450)	(255,000)	479,400	(2,973,050)	1,211,400	(1,761,650)	1,234,600	(527,050)	242,600	(284,450)	247,000	(37,450)	
		<b>(1,718,368)</b>	<b>(1,776,000)</b>	<b>0</b>	<b>(3,494,368)</b>	<b>(255,000)</b>	<b>479,400</b>	<b>(3,269,968)</b>	<b>1,211,400</b>	<b>(2,058,568)</b>	<b>1,234,600</b>	<b>(823,968)</b>	<b>242,600</b>	<b>(581,368)</b>	<b>247,000</b>	<b>(334,368)</b>



DESCRIPTION OF CHARGE	VAT	GL ACCOUNT CODE	UNIT	Notes			
				2025-2026 £	2026-2027 £	Percentage increase	£ increase
1 BUILDING CONTROL & PLANNING - COMMON CHARGES							
1.1 BUILDING AND PLANNING RECORDS SEARCH							
Domestic development enquiries*	SR	40001 9356	Each enquiry	70.00	70.00	0.00%	0.00
Commercial development enquiries*	SR	40001 9356	Each enquiry	110.00	110.00	0.00%	0.00
Section 106 and / or Tree Preservation Order document request	OS	40001 9356	Each document	70.00	70.00	0.00%	0.00
Section 106 document enquiry (i.e obligation compliance)	OS	40001 9356	Per hour	0.00	70.00	NEW	NEW
Tree Preservation Order or Conservation Area enquiry	OS	40001 9356	Each enquiry	25.00	25.00	0.00%	0.00
1.2 COPY OF PLANS, DOCUMENTS & DECISIONS**							
A4 size per sheet	OS	40001 9206	Each	3.00	3.00	0.00%	0.00
A3 size per sheet	OS	40001 9206	Each	3.00	3.00	0.00%	0.00
A2 size per sheet	OS	40001 9206	Each	10.00	10.00	0.00%	0.00
A1 size per sheet	OS	40001 9206	Each	10.00	10.00	0.00%	0.00
A0 size per sheet	OS	40001 9206	Each	10.00	20.00	100.00%	10.00
1.3 PRE APPLICATION CHARGES - HOUSEHOLDER, COMMERCIAL AND CHANGES OF USE ENQUIRIES							
Written Householder Advice – small scale extensions / alterations to one house or a single flat; small scale development within the curtilage of the property.***	SR	40001 9395	Each enquiry	200.00	200.00	0.00%	0.00
Written Householder Advice (where heritage or arboricultural advice is required) – small scale. Additional charge per expertise (in addition to related fee).***	SR	40001 9395	Each enquiry	60.00	60.00	0.00%	0.00
Small Scale Development Advice (commercial) - Small scale extensions / alterations to commercial or similar premises, below 100 m2.***	SR	40001 9395	Each enquiry	225.00	225.00	0.00%	0.00
Small scale development advice (commercial) (where heritage or arboricultural advice is required) Additional charge per expertise (in addition to related fee).***	SR	40001 9395	Each enquiry	60.00	60.00	0.00%	0.00
Small to Medium scale development advice (commercial) - small to medium scale extensions / alterations to commercial or similar premises, between 100 and 499 m2.***	SR	40001 9395	Each enquiry	350.00	350.00	0.00%	0.00
Small to Medium scale development advice (commercial) (where heritage or arboricultural advice is required) - Additional charge per expertise (in addition to related fee).***	SR	40001 9395	Each enquiry	60.00	60.00	0.00%	0.00
Medium scale development advice (commercial) - medium scale extensions / alterations to commercial or similar premises, between 500 and 999 m2.***	SR	40001 9395	Each enquiry	1,000.00	1,000.00	0.00%	0.00
Medium scale development advice (commercial) (where heritage or arboricultural advice is required) - Additional charge per expertise (in addition to related fee).***	SR	40001 9395	Each enquiry	100.00	100.00	0.00%	0.00
Larger scale development advice (commercial) - larger scale extensions / alterations to commercial or similar premises, over 1,000 m2.***	SR	40001 9395	Each enquiry	2,200.00	2,500.00	13.64%	300.00
Larger scale development advice (commercial) (where heritage or arboricultural advice is required) - Additional charge per expertise (in addition to related fee).***	SR	40001 9395	Each enquiry	100.00	100.00	0.00%	0.00
Advertising related advice - relates to all advertising proposals.***	SR	40001 9395	Each enquiry	400.00	400.00	0.00%	0.00
Small scale changes of use not relating to any other fee and charge on this schedule.***	SR	40001 9395	Each enquiry	500.00	500.00	0.00%	0.00
Larger scale changes of use not relating to any other fee and charge on this schedule.***	SR	40001 9395	Each enquiry	0.00	1,000.00	NEW	NEW

Telecommunications equipment and apparatus advice.***	SR	40001 9395	Each enquiry	500.00	500.00	0.00%	0.00
1.4 PRE APPLICATION CHARGES - NEW RESIDENTIAL UNIT ENQUIRIES							
1-3 new dwellings.***	SR	40001 9395	Each enquiry	600.00	600.00	0.00%	0.00
1- 3 new dwellings (where heritage or arboricultural advice is required). Additional charge per expertise (in addition to related fee).***	SR	40001 9395	Each enquiry	100.00	100.00	0.00%	0.00
4-9 new dwellings.***	SR	40001 9395	Each enquiry	1,100.00	1,100.00	0.00%	0.00
4-9 new dwellings (where heritage or arboricultural advice is required). Additional charge per expertise (in addition to related fee).***	SR	40001 9395	Each enquiry	100.00	100.00	0.00%	0.00
10-49 new dwellings.***	SR	40001 9395	Each enquiry	2,250.00	2,250.00	0.00%	0.00
10-49 new dwellings (where heritage or arboricultural advice is required). Additional charge per expertise (in addition to related fee).***	SR	40001 9395	Each enquiry	150.00	150.00	0.00%	0.00
50-199 new dwellings.***	SR	40001 9395	Each enquiry	3,500.00	3,500.00	0.00%	0.00
50-199 new dwellings (where heritage or arboricultural advice is required). Additional charge per expertise (in addition to related fee).***	SR	40001 9395	Each enquiry	200.00	200.00	0.00%	0.00
200-399 new dwellings.***	SR	40001 9395	Each enquiry	5,000.00	6,000.00	20.00%	1,000.00
200-399 new dwellings (where heritage or arboricultural advice is required). Additional charge per expertise (in addition to related fee).***	SR	40001 9395	Each enquiry	250.00	250.00	0.00%	0.00
400 - 799 new dwellings.***	SR	40001 9395	Each enquiry	6,500.00	7,500.00	15.38%	1,000.00
400 - 799 new dwellings (where heritage or arboricultural advice is required). Additional charge per expertise (in addition to related fee).***	SR	40001 9395	Each enquiry	300.00	300.00	0.00%	0.00
800 or more new dwellings.***	SR	40001 9395	Each enquiry	9,000.00	10,000.00	11.11%	1,000.00
800 or more new dwellings (where heritage or arboricultural advice is required). Additional charge per expertise (in addition to related fee).***	SR	40001 9395	Each enquiry	300.00	300.00	0.00%	0.00
Site visit / meeting (additional fee) relating to any planning related enquiry.	SR	DC - 40001 9395 PP - 40101 9201	Each site visit or meeting	300.00	300.00	0.00%	0.00
Strategic sites (approximately 1,000 homes or more).	SR	40001 9395	Each enquiry	NEW	POA	NEW	NEW
Planning Performance Agreement (PPA).	SR	40001 9201	Fee per agreement	NEW	POA	NEW	NEW
1.5 HIGH HEDGE COMPLAINTS							
Complaints via written means (electronic or hard copy)	OS	40001 9369	Each enquiry	550.00	550.00	0.00%	0.00
Those on means tested benefits and war pensions will receive a 33% discount	OS	40001 9369	Each enquiry	368.50	368.50	0.00%	0.00
1.6 WEEKLY LIST OF ALL PLANNING APPLICATIONS							
1.7 OADBY AND WIGSTON LOCAL PLAN							
New Local Plan DPD (non resident or local group)**	OS	40101 9206	Each	45.00	45.00	0.00%	0.00
New Local Plan DPD (resident or local group)**	OS	40101 9206	Each	20.00	20.00	0.00%	0.00
1.8 OTHER DOCUMENTS							
Annual Monitoring Documents (Published Annually)**	OS	40101 9206	Each	20.00	20.00	0.00%	0.00
Supplementary Planning Document / Statements of Consultation**	OS	40101 9206	Each	20.00	20.00	0.00%	0.00
Employment Land Availability Study (Published Annually)**	OS	40101 9206	Each	20.00	20.00	0.00%	0.00
Landscape Character Assessment**	OS	40101 9206	Each	35.00	35.00	0.00%	0.00
Oadby & Wigston Green Wedge Management Strategy	OS	40101 9206	Each	35.00	35.00	0.00%	0.00
Oadby & Wigston Phase 1 Habitat Survey & Biodiversity Audit**	OS	40101 9206	Each	35.00	35.00	0.00%	0.00
Oadby and Wigston Employment Land and Premises Study**	OS	40101 9206	Each	35.00	35.00	0.00%	0.00
Statement of Community Involvement**	OS	40101 9206	Each	35.00	35.00	0.00%	0.00
Nature Conservation Strategy	OS	40101 9206	Each	35.00	35.00	0.00%	0.00
Local Development Scheme**	OS	40101 9206	Each	10.00	10.00	0.00%	0.00
HEDNA**	OS	40101 9206	Each	35.00	35.00	0.00%	0.00
Retail Study**	OS	40101 9206	Each	35.00	35.00	0.00%	0.00
Faith Community Study & Places of Worship Needs Assessment**	OS	40101 9206	Each	35.00	35.00	0.00%	0.00
Play & Recreational Facilities Study	OS	40101 9206	Each	35.00	35.00	0.00%	0.00
Affordable Housing Viability Assessment**	OS	40101 9206	Each	35.00	35.00	0.00%	0.00
Whole Plan Viability Assessment**	OS	40101 9206	Each	35.00	35.00	0.00%	0.00

Assessment of Highways and Transportation Implications	OS	40101 9206	Each	35.00	35.00	0.00%	0.00
Employment Sites & Brownfield Land Study	OS	40101 9206	Each	35.00	35.00	0.00%	0.00
Adopted Policies Map	OS	40101 9206	Each	20.00	20.00	0.00%	0.00

**Notes:**

- \* Relating to all chargeable enquiries not mentioned below; for example, Permitted Development right check, lawful use check, and planning permission check.
- \*\* Documents are available on the Council's website free of charge. [www.oadby-wigston.gov.uk](http://www.oadby-wigston.gov.uk)
- \*\*\* Does not include a site visit or meeting.

**VAT Key:**

- EX Exempt
- OS Non Business
- SR Standard Rated
- ZR Zero Rated

DESCRIPTION OF CHARGE		VAT	GL ACCOUNT CODE	UNIT	2025-2026 £	2026-2027 £	Percentage increase	£ increase	Notes
2	LICENCES								
2.1	PRIVATE HIRE OPERATOR'S LICENCE (5 YEARS)								
	1 to 5 Vehicles	OS	42001 9331	Each	1,050.00	1,090.00	3.81%	40.00	
	6 to 10 Vehicles	OS	42001 9331	Each	1,550.00	1,610.00	3.87%	60.00	
	11+ Vehicles	OS	42001 9331	Each	2,060.00	2,140.00	3.88%	80.00	
	Replacement paper licence for operator	SR	42001 9373	Each	25.00	27.50	10.00%	2.50	
	Changes to your operator licence (variations) - plus the difference in fee bracket	OS	42001 9388	Each	NEW	80.00	NEW	NEW	
	Competency Test	OS	42001 9389	Each	55.00	60.00	9.09%	5.00	
2.2	DRIVER'S LICENCE FEES (3 YEARS)								
	Hackney Carriage & Private Hire Driver Licence	OS	42001 9333	Each	350.00	365.00	4.29%	15.00	
	Replacement driver I.D. badge	SR	42001 9373	Each	35.00	37.50	7.14%	2.50	
	Replacement paper licence for driver	SR	42001 9373	Each	25.00	27.50	10.00%	2.50	
	Changes to your driver licence (variations)	OS	42001 9388	Each	NEW	25.00	NEW	NEW	
	Competency Test	OS	42001 9389	Each	55.00	60.00	9.09%	5.00	
2.3	VEHICLE LICENCE FEES (1 YEAR)								
	Hackney Carriage & Private Hire Vehicle Licence	OS	42001 9335	Each	350.00	365.00	4.29%	15.00	
	Electric Vehicle (50% discount)	OS	42001 9335	Each	175.00	182.50	4.29%	7.50	
	Ultra Low Emission Vehicle (25% discount)	OS	42001 9335	Each	262.50	274.00	4.38%	11.50	
	Wheelchair Accessible Vehicle (25% discount)	OS	42001 9335	Each	262.50	274.00	4.38%	11.50	
	Transfer of Hackney Carriage & Private Hire Vehicle Licence (change of owner)	OS	42001 9377	Each	62.00	65.00	4.84%	3.00	
	Replacement of external plate (holder, bracket and secure fixings)	SR	42001 9373	Each	36.00	37.50	4.17%	1.50	
	Replacement internal vehicle licence	SR	42001 9373	Each	26.00	27.50	5.77%	1.50	
	Replacement paper licence for vehicle	SR	42001 9373	Each	25.00	27.50	10.00%	2.50	
	Changes to your vehicle licence (variations)	OS	42001 9388	Each	NEW	20.00	NEW	NEW	
	HPI checks (new applicants)	SR	42001 9383	Each	22.00	22.50	2.27%	0.50	
	Certificate of Compliance	OS	42001 9201	Each	25.00	27.50	10.00%	2.50	
2.4	GAMBLING ACT 2005								
	Premises Licence								
	New Applications								
	Bingo	OS	42004 9410	Each	3,500.00	3,500.00	0.00%	0.00	
	Betting Shop	OS	42004 9400	Each	3,000.00	3,000.00	0.00%	0.00	
	Adult Gaming Centre	OS	42004 9414	Each	2,000.00	2,000.00	0.00%	0.00	
	Track	OS	42004 9404	Each	2,500.00	2,500.00	0.00%	0.00	
	Family Entertainment Centre	OS	42004 9323	Each	2,000.00	2,000.00	0.00%	0.00	
	New Applications - where provisional statement already issued								
	Bingo	OS	42004 9410	Each	1,200.00	1,200.00	0.00%	0.00	
	Betting Shop	OS	42004 9400	Each	1,200.00	1,200.00	0.00%	0.00	
	Adult Gaming Centre	OS	42004 9414	Each	1,200.00	1,200.00	0.00%	0.00	
	Track	OS	42004 9404	Each	950.00	950.00	0.00%	0.00	
	Family Entertainment Centre	OS	42004 9323	Each	950.00	950.00	0.00%	0.00	
	Provisional Statement Applications								
	Bingo	OS	42004 9410	Each	3,500.00	3,500.00	0.00%	0.00	
	Betting Shop	OS	42004 9400	Each	3,000.00	3,000.00	0.00%	0.00	
	Adult Gaming Centre	OS	42004 9414	Each	2,000.00	2,000.00	0.00%	0.00	
	Track	OS	42004 9404	Each	2,500.00	2,500.00	0.00%	0.00	
	Family Entertainment Centre	OS	42004 9323	Each	2,000.00	2,000.00	0.00%	0.00	
	Transfer Applications								
	Bingo	OS	42004 9410	Each	1,200.00	1,200.00	0.00%	0.00	
	Betting Shop	OS	42004 9400	Each	1,200.00	1,200.00	0.00%	0.00	
	Adult Gaming Centre	OS	42004 9414	Each	1,200.00	1,200.00	0.00%	0.00	
	Track	OS	42004 9404	Each	950.00	950.00	0.00%	0.00	
	Family Entertainment Centre	OS	42004 9323	Each	950.00	950.00	0.00%	0.00	
	Existing Casino	OS	42004 9201	Each	1,350.00	1,350.00	0.00%	0.00	



<b>Small Society Lotteries</b>							
New	OS	42004 9420	Each	40.00	40.00	0.00%	0.00
Annual fee	OS	42004 9420	Each	20.00	20.00	0.00%	0.00
<b>2.5 LICENSING ACT 2003</b>							
New premises application (subject to NNDR band)							
Band A	OS	42003 9364	Each	100.00	100.00	0.00%	0.00
Band B	OS	42003 9364	Each	190.00	190.00	0.00%	0.00
Band C	OS	42003 9364	Each	315.00	315.00	0.00%	0.00
Band D	OS	42003 9364	Each	450.00	450.00	0.00%	0.00
Band E	OS	42003 9364	Each	635.00	635.00	0.00%	0.00
Band D primary alcohol x2	OS	42003 9364	Each	900.00	900.00	0.00%	0.00
Band E primary alcohol x3	OS	42003 9364	Each	1,905.00	1,905.00	0.00%	0.00
Annual renewal fees (subject to NNDR band)							
Band A	OS	42003 9381	Each	70.00	70.00	0.00%	0.00
Band B	OS	42003 9381	Each	180.00	180.00	0.00%	0.00
Band C	OS	42003 9381	Each	295.00	295.00	0.00%	0.00
Band D	OS	42003 9381	Each	320.00	320.00	0.00%	0.00
Band E	OS	42003 9381	Each	350.00	350.00	0.00%	0.00
Band D primary alcohol x2	OS	42003 9381	Each	640.00	640.00	0.00%	0.00
Band E primary alcohol x3	OS	42003 9381	Each	1,050.00	1,050.00	0.00%	0.00
Other fees							
Personal licence (grant)	OS	42003 9371	Each	37.00	37.00	0.00%	0.00
Personal licence change of details	OS	42003 9375	Each	10.50	10.50	0.00%	0.00
Temporary event notices (TEN)	OS	42003 9372	Each	21.00	21.00	0.00%	0.00
Theft/loss of premises licence/club certificate, summary, personal licence or TEN	OS	42003 9373	Each	10.50	10.50	0.00%	0.00
Application for provisional statement	OS	42003 9374	Each	315.00	315.00	0.00%	0.00
Change of name and address	OS	42003 9375	Each	10.50	10.50	0.00%	0.00
Variation of designated premises supervisors (DPS)	OS	42003 9376	Each	23.00	23.00	0.00%	0.00
Variation to include alternative condition (no DPS)	OS	42003 9376	Each	23.00	23.00	0.00%	0.00
Application for transfer of premises license	OS	42003 9377	Each	23.00	23.00	0.00%	0.00
Interim authority notice	OS	42003 9378	Each	23.00	23.00	0.00%	0.00
Right of freeholder to be notified of licensing matters	OS	49901 9356	Each	21.00	21.00	0.00%	0.00
Minor variation	OS	42003 9393	Each	89.00	89.00	0.00%	0.00
<b>2.6 LICENCE FEES</b>							
<b>Street Trading</b>							
Street Trading per outlet - fixed							
Half a day (5 hours)	OS	42002 9440	Each	75.00	80.00	6.67%	5.00
1 day a week	OS	42002 9440	Each	150.00	155.00	3.33%	5.00
1 month	OS	42002 9440	Each	200.00	210.00	5.00%	10.00
3 month	OS	42002 9440	Each	300.00	315.00	5.00%	15.00
6 month	OS	42002 9440	Each	580.00	600.00	3.45%	20.00
12 month	OS	42002 9440	Each	770.00	800.00	3.90%	30.00
Street Trading per outlet - mobile							
1 day a week	OS	42002 9440	Each	150.00	155.00	3.33%	5.00
1 month	OS	42002 9440	Each	200.00	210.00	5.00%	10.00
3 month	OS	42002 9440	Each	300.00	310.00	3.33%	10.00
6 month	OS	42002 9440	Each	580.00	600.00	3.45%	20.00
12 month	OS	42002 9440	Each	770.00	800.00	3.90%	30.00
One off event licence	OS	42002 9440	Each	125.00	130.00	4.00%	5.00
Dual 12 month licence	OS	42002 9440	Each	1,240.00	1,285.00	3.63%	45.00
Transfer of consent (fixed or mobile)	OS	42002 9440	Each	100.00	105.00	5.00%	5.00
<b>Sex Establishments</b>							
Sex shop / sexual entertainment venue	OS	42002 9323	Each	4,000.00	4,150.00	3.75%	150.00
Renewal	OS	42002 9323	Each	4,000.00	4,150.00	3.75%	150.00
Transfer of licence	OS	42002 9323	Each	NEW	750.00	NEW	NEW
Variation of licence	OS	42002 9323	Each	NEW	250.00	NEW	NEW

<b>Pavement Licences (2 years)</b>							
New licence	OS	42002 9442	Each	256.00	500.00	95.31%	244.00
Renewal of licence	OS	42002 9442	Each	200.00	350.00	75.00%	150.00
<b>Scrap Metal Dealers</b>							
Site licence - New & Renewal	OS	42002 9337	Each	500.00	520.00	4.00%	20.00
Collectors licence - New & Renewal	OS	42002 9337	Each	400.00	415.00	3.75%	15.00
Variation of licence	OS	42002 9337	Each	110.00	115.00	4.55%	5.00
Change of name	OS	42002 9337	Each	60.00	65.00	8.33%	5.00
Replacement of documentation	OS	42002 9337	Each	NEW	27.50	NEW	NEW
<b>Animal Activity - New Application Fees</b>							
Application Fee:							
Selling animals as pets	OS	42002 9327	Each	180.00	185.00	2.78%	5.00
Selling animals as pets where Dangerous Wild Animals (DWA) are also sold	OS	42002 9334	Each	250.00	260.00	4.00%	10.00
Hiring out 1 to 5 horses	OS	42002 9325	Each	440.00	455.00	3.41%	15.00
Hiring out 6 to 10 horses	OS	42002 9325	Each	500.00	520.00	4.00%	20.00
Hiring out 11 to 20 horses	OS	42002 9325	Each	560.00	580.00	3.57%	20.00
Breeding	OS	42002 9326	Each	500.00	520.00	4.00%	20.00
Boarding of animals	OS	42002 9327	Each	320.00	330.00	3.13%	10.00
Training of animals for exhibition	OS	42002 9386	Each	180.00	185.00	2.78%	5.00
Grant Fee:							
Selling animals as pets	OS	42002 9327	Each	300.00	310.00	3.33%	10.00
Selling animals as pets where Dangerous Wild Animals (DWA) are also sold	OS	42002 9334	Each	150.00	155.00	3.33%	5.00
Hiring out 1 to 5 horses	OS	42002 9325	Each	290.00	300.00	3.45%	10.00
Hiring out 6 to 10 horses	OS	42002 9325	Each	340.00	355.00	4.41%	15.00
Hiring out 11 to 20 horses	OS	42002 9325	Each	395.00	410.00	3.80%	15.00
Breeding	OS	42002 9326	Each	150.00	155.00	3.33%	5.00
Boarding of animals	OS	42002 9327	Each	150.00	155.00	3.33%	5.00
Training of animals for exhibition	OS	42002 9386	Each	150.00	155.00	3.33%	5.00
<b>Animal Activity - Renewal Application Fees</b>							
Application Fee:							
Selling animals as pets	OS	42002 9327	Each	180.00	185.00	2.78%	5.00
Selling animals as pets where Dangerous Wild Animals (DWA) are also sold	OS	42002 9334	Each	250.00	260.00	4.00%	10.00
Hiring out 1 to 5 horses	OS	42002 9325	Each	440.00	455.00	3.41%	15.00
Hiring out 6 to 10 horses	OS	42002 9325	Each	500.00	520.00	4.00%	20.00
Hiring out 11 to 20 horses	OS	42002 9325	Each	560.00	580.00	3.57%	20.00
Breeding	OS	42002 9326	Each	450.00	465.00	3.33%	15.00
Boarding of animals	OS	42002 9327	Each	280.00	290.00	3.57%	10.00
Training of animals for exhibition	OS	42002 9386	Each	180.00	185.00	2.78%	5.00
Grant Fee:							
Selling animals as pets	OS	42002 9327	Each	300.00	310.00	3.33%	10.00
Selling animals as pets where Dangerous Wild Animals (DWA) are also sold	OS	42002 9334	Each	150.00	155.00	3.33%	5.00
Hiring out 1 to 5 horses	OS	42002 9325	Each	290.00	300.00	3.45%	10.00
Hiring out 6 to 10 horses	OS	42002 9325	Each	340.00	355.00	4.41%	15.00
Hiring out 11 to 20 horses	OS	42002 9325	Each	395.00	410.00	3.80%	15.00
Breeding	OS	42002 9326	Each	150.00	155.00	3.33%	5.00
Boarding of animals	OS	42002 9327	Each	150.00	155.00	3.33%	5.00
Training of animals for exhibition	OS	42002 9386	Each	150.00	155.00	3.33%	5.00
Re-assessment of star rating	OS	42002 9388	Each	200.00	210.00	5.00%	10.00
Minor variation - no visit	OS	42002 9388	Each	120.00	125.00	4.17%	5.00
Major variation - visit	OS	42002 9388	Each	150.00	155.00	3.33%	5.00
Additional licensable activity	OS	42002 9387	Each	80.00	85.00	6.25%	5.00
<b>Tattooists, Ear Piercing, Acupuncture, Semi- Permanent Make-up &amp; Electrolysis</b>							
Premises licence	OS	42002 9329	Each	300.00	310.00	3.33%	10.00
Personal licence	OS	42002 9329	Each	120.00	125.00	4.17%	5.00
Combined	OS	42002 9329	Each	370.00	385.00	4.05%	15.00
<b>Hairdresser</b>							
Premises licence	OS	42002 9336	Each	200.00	210.00	5.00%	10.00
Personal licence	OS	42002 9336	Each	120.00	125.00	4.17%	5.00



Combined	OS	42002 9336	Each	370.00	385.00	4.05%	15.00
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**VAT Key:**  
EX Exempt  
OS Non Business  
SR Standard Rated  
ZR Zero Rated

DESCRIPTION OF CHARGE		VAT	GL ACCOUNT CODE	UNIT	2025-2026 £	2026-2027 £	Percentage increase	£ increase	Notes
<b>3 ENVIRONMENTAL HEALTH</b>									
<b>3.1 ENVIRONMENTAL HEALTH SERVICES</b>									
<b>Environment &amp; Safety Information Act 1988</b>									
Copies of entries in register		SR	14001 9200	Each	16.00	17.00	6.25%	1.00	
<b>Food Safety</b>									
Copies of register of food businesses		SR	14001 9200	Each	750.00	779.00	3.87%	29.00	
<b>Environmental Protection</b>									
Copies of register of authorisations		SR	14001 9200	Each	70.00	73.00	4.29%	3.00	
<b>Food Export Certificate</b>									
Certificate		OS	14001 9200	Each	170.00	200.00	17.65%	30.00	
Amendments		OS	14001 9200	Each	NEW	25.00	NEW	NEW	
<b>Food Hygiene Inspections (Food Hygiene Rating Scheme)</b>									
Food hygiene re-rating inspections		OS	14001 9200	Each	200.00	220.00	10.00%	20.00	
<b>Works in default</b>									
Works in default - recovery of costs		SR	14001 9104	-	Cost	Cost	-	-	
Works in default - administrative expenses and officer time - Hourly Rate		SR	14001 9104	-	Hourly Rate	Hourly Rate	-	-	
<b>Fixed Penalty Notices - Statutory Charges</b>									
Full list of FPNs can be found on <a href="http://www.oadby-wigston.gov.uk/pages/fixed_penalty_notices_and_fines">www.oadby-wigston.gov.uk/pages/fixed_penalty_notices_and_fines</a>									
<b>Dog Control</b>									
Stray dogs - statutory charge		OS	14007 9200	Each	25.00	26.00	4.00%	1.00	
Collect & return to owner/ take to kennels		OS	14007 9200	Each	87.50	91.00	4.00%	3.50	
Collect & return if dog strays >1 (in 6 month period)		OS	14007 9200	Each	129.00	134.00	3.88%	5.00	
Kennelling fee		OS	14007 9200	Per Day	14.50	15.00	3.45%	0.50	
Emergency vets fee (plus 10% admin fee) - recovery of costs		SR	14007 9200	Visit	Cost	Cost	-	-	
<b>3.2 PRIVATE SECTOR HOUSING</b>									
<b>Private Sector Housing</b>									
Accommodation Certificates		OS	42005 9360	Each	185.00	195.00	5.41%	10.00	
Change of details on certificate		OS	42005 9360	Each	35.00	40.00	14.29%	5.00	
New Application 5 year Licensing of Houses in Multiple Occupation (HMO)		OS	42005 9392	Each	800.00	550.00	-31.25%	-250.00	Original fee was not structured in line with Hemming
Additional Fee for Unlicensed Premises		OS	42005 9392	Each	400.00	450.00	12.50%	50.00	Amended to reflect additional work required
Enforcement fee		OS	42005 9392	Each	400.00	450.00	12.50%	50.00	Amended in line with fees agreed by L&RC
Deductions for:									
Second house to be licensed		OS	42005 9392	Each	-30.00	-50.00	66.67%	-20.00	Amended in line with Selective Licensing
Membership of approved accreditation schemes		OS	42005 9392	Each	-100.00	-100.00	0.00%	0.00	Fixed in line with Selective Licensing
Membership of approved landlord scheme		OS	42005 9392	Each	-100.00	-100.00	0.00%	0.00	Fixed in line with Selective Licensing
Notices served under Housing Act 2004		OS	42005 9392	Per Hour	52.00	55.00	5.77%	3.00	
Expenses incurred in determining Enforcement Action		OS	42005 9392	-	Cost	Cost	-	-	
<b>3.3 SELECTIVE LICENSING SCHEME</b>									
<b>Selective Licensing Scheme Fees</b>									
Application Fee									
Standard Fee		OS	42005 9441	Each	450.00	450.00	0.00%	0.00	
Accredited Fee		OS	42005 9441	Each	350.00	350.00	0.00%	0.00	

Multi-Property Discount	OS	42005 9441	Each	400.00	400.00	0.00%	0.00
Previous Applicant Discount	OS	42005 9441	Each	400.00	400.00	0.00%	0.00
Subsistence Fee							
Standard Fee	OS	42005 9441	Each	400.00	400.00	0.00%	0.00
Accredited Fee	OS	42005 9441	Each	400.00	400.00	0.00%	0.00
Multi-Property Discount	OS	42005 9441	Each	400.00	400.00	0.00%	0.00
Previous Applicant Discount	OS	42005 9441	Each	300.00	300.00	0.00%	0.00
Supplementary Fees							
Application Fee							
Accredited and Multi-Property	OS	42005 9441	Each	300.00	300.00	0.00%	0.00
Accredited and Previous Applicant	OS	42005 9441	Each	300.00	300.00	0.00%	0.00
Identified Property/Late Application Fee	OS	42005 9441	Each	750.00	750.00	0.00%	0.00
Variation to Licence	OS	42005 9441	Each	30.00	30.00	0.00%	0.00
One year Licence (Following Inspection)	OS	42005 9441	Each	As per appropriate fee above	As per appropriate fee above	-	-
Subsistence Fee							
Accredited and Multi-Property	OS	42005 9441	Each	400.00	400.00	0.00%	0.00
Accredited and Previous Applicant	OS	42005 9441	Each	300.00	300.00	0.00%	0.00
Identified Property/Late Application Fee	OS	42005 9441	Each	400.00	400.00	0.00%	0.00
One year Licence (Following Inspection)	OS	42005 9441	Each	800.00	800.00	0.00%	0.00
3.4 ABANDONED VEHICLE							
Abandoned vehicle charge	OS	14001 9200	Each	150.00+	150.00+	-	-
Per day storage - maximum of 15 days storage & only if vehicle is worth >£1000 in value	SR	14001 9200	Daily	10.00+	10.00+	-	-
Disposal fee	SR	14001 9200	Each	50.00+	50.00+	-	-
3.5 CONTAMINATED LAND ENQUIRIES							
Written correspondence	OS	14001 9200	Per Letter	82.00	85.00	3.66%	3.00
Additional hourly charge	OS	14001 9200	Per Hour	72.00	75.00	4.17%	3.00
3.6 CCTV							
Request for viewing	SR	14001 9200	Each	POA	POA	-	-
3.7 SOLICITOR/ BUSINESS REQUESTS INCLUDING FACTUAL REPORTS							
Written correspondence	SR	14001 9200	Per Letter	82.00	85.00	3.66%	3.00
Additional hourly charge	SR	14001 9200	Per Hour	72.00	75.00	4.17%	3.00

- VAT Key:
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DESCRIPTION OF CHARGE		VAT	GL ACCOUNT CODE	UNIT	2025-2026 £	2026-2027 £	Percentage increase	£ increase	Notes
4 CORPORATE RESOURCES									
4.1 COPIES OF OFFICIAL / CERTIFIED COUNCIL DOCUMENTS									
Annual Report & Budget Book (Hard-Copy Only)		ZR	30201 9206	Each set	56.00	58.00	3.57%	2.00	
Agendas, Reports & Background Documents (Hard-Copy Only)		ZR	30201 9206	Each set	24.00	25.00	4.17%	1.00	
Minutes (Hard-Copy Only)		ZR	30201 9206	Each set	18.00	19.00	5.56%	1.00	
Miscellaneous Legal Contracts, Agreements, Deeds, Instruments etc.		SR	39904 9206	Each doc	52.00	54.00	3.85%	2.00	
4.2 LEGAL / ADMINISTRATIVE SERVICES									
Simple Transfers, Charges, Leases, Licences, Other Agreements etc.		SR	39904 9105	Each set	POA	POA	-	-	
Complex Transfers, Charges, Leases, Licences, Other Agreements etc.		SR	39904 9105	Each set	POA	POA	-	-	
Commercial Transfers, Charges, Leases, Licences, Other Agreements etc.		SR	39904 9105	Each set	POA	POA	-	-	
Freehold / Leasehold Property Enquires		SR	39904 9105	Each set	258.00	268.00	3.88%	10.00	
Statutory Declarations, Statements, Affidavits, Certificates		SR	39904 9105	Each doc	POA	POA	-	-	
Certification of Original Documents		SR	39904 9356	Each doc	POA	POA	-	-	
Miscellaneous Hourly Rates (Qualified over 8ys)		SR	39904 9105	Per hour	200.00	208.00	4.00%	8.00	
Miscellaneous Hourly Rates (Non-Qualified)		SR	39904 9105	Per hour	138.00	143.00	3.62%	5.00	
4.3 LOCAL LAND CHARGES (LLC) <span>Set by BDC</span>									
Full Search (LLC and Con29R) (Residential / Commercial)		OS	30101 9200	Per Search	External	External	0.00%	0.00	
LLC1 Search		OS	30101 9200	Each	External	External	0.00%	0.00	
CON29R Search		OS	30101 9200	Each	External	External	0.00%	0.00	
CON29 Optional (Questions 4-22 each)		OS	30101 9200	Each	External	External	0.00%	0.00	
CON29 Building Regs (Q1.1j-l and 3.8 each)		OS	30101 9200	Each	External	External	0.00%	0.00	
LLC1 Additional parcel fee		OS	30101 9200	Each	External	External	0.00%	0.00	
CON29R Additional parcel fee (up to a maximum of 10)		OS	30101 9200	Each	External	External	0.00%	0.00	
Own written questions		OS	30101 9200	Each	External	External	0.00%	0.00	
4.4 COPIES OF BYLAWS (Statutory max 20p per 100 words)									
		SR	39904 9206	Each	External	External	0.00%	0.00	
4.5 ELECTORAL SERVICES									
Written proof of registration		OS	30401 9203	Each	POA	POA	-	-	
Forwarding of documents		OS	30401 9203	Each	POA	POA	-	-	
Written proof of historical registration		OS	30401 9203	Each	POA	POA	-	-	
Sale of registers (open register, marked register etc.).		OS	30401 9203	Each	POA	POA	-	-	
4.6 ENVIRONMENTAL INFORMATION REGULATIONS (EIR) CHARGES									
Photocopy or printing, standard, black and white, normal paper - min A4		SR	39904 9356	Per Page	0.10	3.00	2900.00%	2.90	
Photocopy or printing, standard, black and white, normal paper - A3		SR	39904 9356	Per Page	0.15	3.00	1900.00%	2.85	
Photocopy or printing, standard, black and white, normal paper - A2		SR	39904 9356	Per Page	0.21	10.00	4661.90%	9.79	
Photocopy or printing, standard, black and white, normal paper - A1		SR	39904 9356	Per Page	0.26	10.00	3746.15%	9.74	
Photocopy or printing, standard, black and white, normal paper - A0		SR	39904 9356	Per Page	0.52	10.00	1823.08%	9.48	
Reproduction of data onto other Portal / Cloud Device etc.		SR	39904 9356	Each	POA	POA	-	-	
Miscellaneous Expenses and Disbursements		EX	39904 9054	-	POA	POA	-	-	
4.7 FREEDOM OF INFORMATION ACT (FOIA) CHARGES UNDER SECTION 12									
Price on Application (POA) for requests that exceed the cost limit of £450.00/ 18 hours		OS	39904 9356	-	POA	POA	-	-	

VAT Key:  
EX Exempt  
OS Non Business  
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DESCRIPTION OF CHARGE		VAT	GL ACCOUNT CODE	UNIT	2025- 2026 £	2026- 2027 £	Percentage increase	£ increase	Notes
5	HOUSING								
5.1	HOUSING FEES								
	Use of Guest Rooms								
	Chartwell House	EX	11501 9552	Night	26.00	27.00	3.85%	1.00	
	Marriott House	EX	11502 9552	Night	26.00	27.00	3.85%	1.00	
	William Peardon Court	EX	11503 9552	Night	26.00	27.00	3.85%	1.00	
	Room Hire Communal Lounge								
	Chartwell House	EX	11501 9554	Hourly	23.00	24.00	4.35%	1.00	
	Marriott House	EX	11502 9554	Hourly	23.00	24.00	4.35%	1.00	
	William Peardon Court	EX	11503 9554	Hourly	23.00	24.00	4.35%	1.00	
	Hostel Charge	EX	14202 9600	Weekly	251.55	263.63	4.80%	12.07	Rent increase of 4.8%
	Replacement Key	SR	10001 9362	Each	10.00	15.00	50.00%	5.00	
	Key Fob Deposits - Refundable	OS	62023 9629	Each	10.00	15.00	50.00%	5.00	
	Rechargeable Repairs - Recovery of Costs	SR	10001 9200	-	Cost	Cost	-	-	Cost of a repair that is due to tenant neglect or misuse. Invoices need to show total cost of works, the outstanding balance due, administration fee and any VAT applied as appropriate.
	Rechargeable Repairs - Adminstrative Expenses	SR	10001 9200	-	NEW	20.00	NEW	NEW	
	Personal contribution for emergency accommodation								
	Households on JSA/IS (weekly charge)	EX	14201 9104	Weekly	24.00	24.00	0.00%	0.00	
	Employed households (daily charge)	EX	14201 9104	Weekly	108.50	108.50	0.00%	0.00	

VAT Key:

- EX
- OS
- SR
- ZR
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DESCRIPTION OF CHARGE		VAT	GL ACCOUNT CODE	UNIT	2025-2026 £	2026-2027 £	Percentage increase	£ increase	Notes
6	CEMETERIES								
The charges below are to be read in conjunction with the Cemetery Rules and Regulations which are available at <a href="http://www.oadby-wigston.gov.uk/cemeteries">www.oadby-wigston.gov.uk/cemeteries</a> or from the Cemeteries Office.									
The Cemeteries are open for interments from 9:30am to 3.45pm (2.30pm on Fridays); the latest time that an interment can be booked is 3.15pm (Monday to Thursday) and 2.00pm (Friday). For bookings outside of these hours the interment fee will be doubled.									
All children's burial fees are free to bereaved parents and will be reclaimed from the Children's Funeral Fund for England.									
6.1 PURCHASE OF GRAVE AND EXCLUSIVE RIGHT OF BURIAL									
Borough Resident									
Adult grave (over 12 years)		EX	20102 9200		1,166.00	1,210.00	3.77%	44.00	
Child's grave (up to and including 12 years)		EX	20102 9200		324.00	336.00	3.70%	12.00	
Cremated remains plot (Garden of Remembrance)		EX	20102 9200		596.00	619.00	3.86%	23.00	
Non-Resident									
The above charges are trebled in the case of a Non Resident of the Borough of Oadby and Wigston									
Adult grave (over 12 years)		EX	20102 9200		3,498.00	3,630.00	3.77%	132.00	
Child's grave (up to and including 12 years)		EX	20102 9200		972.00	1,008.00	3.70%	36.00	
Cremated remains plot (Garden of Remembrance)		EX	20102 9200		1,788.00	1,857.00	3.86%	69.00	
The fees above include the issue of the Deed of Grant of Burial which is given for a period of 100 years									
To extend the exclusive right of burial in a grave previously purchased for a further 50 years.		EX	20102 9200		233.00	242.00	3.86%	9.00	
NOTE:									
Purchase of burial or cremation plots in advance is not permitted at Oadby Cemetery									
Purchase of burial plots or cremation plots in Wigston Cemetery is limited to a maximum of 2 per applicant									
6.2 INTERMENT - IN A PRIVATE OR COMMON GRAVE									
Borough Resident									
Child (up to one month in age)*		EX	20102 9200		-	-	-	-	
Child (over one month in age up to and including 12 years)*		EX	20102 9200		194.00	201.00	3.61%	7.00	
A person over the age of 12 years*		EX	20102 9200		674.00	700.00	3.86%	26.00	
Interment of cremated remains*		EX	20102 9200		233.00	242.00	3.86%	9.00	
A scattering of Ashes		EX	20102 9200		104.00	108.00	3.85%	4.00	
Non-Resident									
The above charges are double in the case of a non resident of the Borough of Oadby and Wigston.									
Child (up to one month in age)*		EX	20102 9200		-	-	-	-	
Child (over one month in age up to and including 12 years)*		EX	20102 9200		388.00	402.00	3.61%	14.00	
A person over the age of 12 years*		EX	20102 9200		1,348.00	1,400.00	3.86%	52.00	
Interment of cremated remains*		EX	20102 9200		466.00	484.00	3.86%	18.00	
A scattering of Ashes		EX	20102 9200		208.00	216.00	3.85%	8.00	
*Additional charge for burial with less than 48 hours notice or cremated remains with less than 24 hours notice over and above charges for both residents and non residents.									
		EX	20102 9200		311.00	323.00	3.86%	12.00	
6.3 WALLED GRAVES AND VAULTS									
For the right to construct a walled grave or vault									
9ft x 9ft		EX	20102 9200		1,556.00	1,615.00	3.79%	59.00	
9ft x 4ft		EX	20102 9200		1,258.00	1,306.00	3.82%	48.00	
6.4 MONUMENTS, HEADSTONES, TABLETS AND INSCRIPTIONS - PERMIT FEES									
A memorial permit must be obtained before any memorial is installed or modified. Permit fees cover administration and memorial safety inspections by the cemetery. For further information on memorials, including permitted sizes in each section of the cemeteries see the Cemetery Rules and Regulations.									
Up to and including 1ft in height (300mm)		EX	20102 9200		104.00	108.00	3.85%	4.00	
Over 1ft but not exceeding 2ft 6in. (300mm to 750mm)		EX	20102 9200		143.00	148.00	3.50%	5.00	
Over 2ft 6in (over 750mm)		EX	20102 9200		272.00	282.00	3.68%	10.00	
Kerbstone, Borderstone or Flatstone enclosing or over a grave									
		EX	20102 9200		311.00	323.00	3.86%	12.00	

For the right to place an inscribed plaque on the memorial at the Garden of Remembrance at Oadby Cemetery						
Up to and including 6ins x 4ins (150mm x 100mm)	EX	20102 9200	91.00	94.00	3.30%	3.00
Over 6ins x 4ins (150mm x 100mm)	EX	20102 9200	130.00	135.00	3.85%	5.00
For each inscription after the first inscription	EX	20102 9200	78.00	81.00	3.85%	3.00
Replacement of existing memorial - administration fee	EX	20102 9200	78.00	81.00	3.85%	3.00
6.5 MISCELLANEOUS						
Transfer of Grave Ownership	OS	20102 9200	78.00	81.00	3.85%	3.00
For Searches of registers, copies and extracts						
Search of registers by Council staff - per hour or part hour	OS	20102 9200	39.00	40.00	2.56%	1.00
Search of registers - in person - per hour or part hour (by prior appointment only)	OS	20102 9200	39.00	40.00	2.56%	1.00
Certificated copies of entry	OS	20102 9200	39.00	40.00	2.56%	1.00
Notice of Interment Forms						
Use of the Chapel at Wigston Cemetery - per funeral	EX	20102 9200	213.00	221.00	3.76%	8.00
Memorial Tree - purchased and planted by Council - donation	EX	20102 9200	285.00	296.00	3.86%	11.00
Memorial bench - purchased and installed by Council - donation	EX	20102 9200	998.00	1,036.00	3.81%	38.00
Exhumation (where requested by Deed Holder - subject to the required statutory approvals) - burial plot	EX	20102 9200	1,011.00	1,049.00	3.76%	38.00
Exhumation (where requested by Deed Holder - subject to the required statutory approvals) - casket plot	EX	20102 9200	350.00	363.00	3.71%	13.00

* DEFINITION OF THE TERM RESIDENT *						
For Purchase of Grant of Right of Burial a <b>RESIDENT</b> is defined as: A person who, at the time of applying, has a permanent home address within the Borough						
For Interments a <b>RESIDENT</b> is defined as: A person who had resided at a private address within the Borough for 5 consecutive years immediately preceding the date of death <b>OR</b> A person who had at the time of death, resided in a residential or nursing home (or similar establishment) outside of the Borough for 3 years or less but had resided at an address within the Borough for the 5 consecutive years (or more) immediately preceding moving to the residential or nursing home <b>OR</b> A person who had resided within the Borough for 5 consecutive years (or more) but had within the 6 months immediately preceding the date of death moved from the Borough.						

VAT Key:	
EX	Exempt
OS	Non Business
SR	Standard Rated
ZR	Zero Rated



DESCRIPTION OF CHARGE				VAT	GL ACCOUNT CODE	UNIT	2025-2026 £	2026-2027 £	Percentage increase	£ increase	Notes
7 ADVERTISING & SPONSORSHIPS											
7.1 ADVERTISING ON THE DIGITAL DISPLAY SCREENS											
Community Groups/ Charity not-for-profit advert											
First advert in quarter				SR	30001 9201	First screen only	0.00	0.00	0.00%	0.00	
First advert in quarter on all three screens				SR	30001 9201	Additional screens	52.00	54.00	3.85%	2.00	
Additional adverts in same quarter				SR	30001 9201	Per screen	26.00	27.00	3.85%	1.00	
Business within the Borough, community groups outside the borough or Community Groups/ Charities from within the borough with a for-profit advert											
Advert shown for up to one month				SR	30001 9201	Per screen	52.00	54.00	3.85%	2.00	
Advert shown for between one and three months				SR	30001 9201	Per screen	129.00	134.00	3.88%	5.00	
Advert shown for between three months and six months				SR	30001 9201	Per screen	258.00	268.00	3.88%	10.00	
Advert shown for between six and 12 months				SR	30001 9201	Per screen	464.00	482.00	3.88%	18.00	
Businesses outside the Borough											
Advert shown for up to one month				SR	30001 9201	Per screen	103.00	107.00	3.88%	4.00	
Advert shown for between one and three months				SR	30001 9201	Per screen	258.00	268.00	3.88%	10.00	
Advert shown for between three months and six months				SR	30001 9201	Per screen	515.00	535.00	3.88%	20.00	
Advert shown for between six and 12 months				SR	30001 9201	Per screen	927.00	962.00	3.78%	35.00	
NOTE: A 20% discount will be offered to any advertiser that wishes to display their advert on all three town centre screens at once (Oadby, Wigston and South Wigston)											
7.2 ADVERTISING ON THE COUNCIL'S INTERNAL INTRANET AND STAFF NEWSLETTER											
All advertisers				SR	30001 9201	Per week	52.00	54.00	3.85%	2.00	
NOTE: A 20% discount will be applied for subsequent weeks featuring the same advert											
7.3 ADVERTISING ALONGSIDE THE COUNCIL'S OUR BOROUGH LEAFLET											
All advertisers											
Single sided A5 leaflet				SR	30001 9201	Per edition	1,803.00	1,872.00	3.83%	69.00	
Doubled sided A5 leaflet				SR	30001 9201	Per edition	2,009.00	2,085.00	3.78%	76.00	
7.4 ADVERTISING WITHIN EMAILS SENT THROUGH THE COUNCIL'S EMAIL SUBSCRIPTION SERVICE											
Promotion of a not-for-profit community event within the borough to 2,700+ what's on and events subscribers				SR	30001 9201	Per email	103.00	107.00	3.88%	4.00	
Promotion of a for-profit community event within the borough 2,700+ what's on and events subscribers				SR	30001 9201	Per email	412.00	428.00	3.88%	16.00	
Promotion of a not-for-profit community event outside of the borough 2,700+ what's on and events subscribers				SR	30001 9201	Per email	206.00	214.00	3.88%	8.00	
Promotion of a for-profit community event outside of the borough 2,700+ what's on and events subscribers				SR	30001 9201	Per email	824.00	855.00	3.76%	31.00	
Inclusion of square/rectangle advert in 5 emails to subscribers in a one-month period (guaranteed to be delivered to a minimum of 10,000 times*).				SR	30001 9201	Per month	258.00	268.00	3.88%	10.00	
Inclusion of banner advert in a 5 emails to subscribers in a one-month period (guaranteed to be delivered a minimum of 10,000 times*).				SR	30001 9201	Per month	412.00	428.00	3.88%	16.00	

Notes:

\* Prices for adhoc requests are available

VAT Key:

EX Exempt

DESCRIPTION OF CHARGE		VAT	GL ACCOUNT CODE	UNIT	2025-2026 £	2026-2027 £	Percentage increase	£ increase	Notes
8	RECREATION GROUNDS, PAVILION, OFFICES & GREEN SPACES HIRE								
8.1	BROCKS HILL COUNCIL OFFICES								
	Civic suite combined (large - accommodates 80 with row seating)								
	Commercial								
	First hour	SR	39917 9201		52.00	54.00	3.85%	2.00	
	Subsequent/ part hour	SR	39917 9201		41.00	43.00	4.88%	2.00	
	Non-commercial								
	First hour	SR	39917 9201		41.00	43.00	4.88%	2.00	
	Subsequent/ part hour	SR	39917 9201		31.00	32.00	3.23%	1.00	
	Civic suite 2 (medium - accommodates 20), Civic suite 1 (small - accommodates 16)								
	Commercial								
	First hour	SR	39917 9201		37.00	38.00	2.70%	1.00	
	Subsequent/ part hour	SR	39917 9201		25.00	26.00	4.00%	1.00	
	Non-commercial								
	First hour	SR	39917 9201		29.00	30.00	3.45%	1.00	
	Subsequent/ part hour	SR	39917 9201		22.00	23.00	4.55%	1.00	
	Campfire room (accommodates 5):								
	Commercial								
	First hour	SR	39917 9201		26.00	27.00	3.85%	1.00	
	Subsequent/ part hour	SR	39917 9201		16.00	17.00	6.25%	1.00	
	Non-commercial								
	First hour	SR	39917 9201		21.00	22.00	4.76%	1.00	
	Subsequent/ part hour	SR	39917 9201		13.00	13.00	0.00%	0.00	
8.2	BROCKS HILL COUNTRY PARK (EDUCATION VISITS)								
	Each activity for up to 20 children maximum - schools located within the borough. There is no charge for teachers/ leaders.	EX	20201 9201		72.00	75.00	4.17%	3.00	
	Each activity for up to 20 children maximum - schools located outside the borough. There is no charge for teachers/ leaders.	EX	20201 9201		82.00	85.00	3.66%	3.00	
	Self-led activity kits. The loss or damage of any of the equipment provided will be recharged.	EX	20201 9201		52.00	54.00	3.85%	2.00	
8.3	ROOM HIRE PER HOUR - VAT EXEMPT PAVILIONS								
	Freer Centre		20004 ****						
	Sheila Mitchell Pavilion		20005 ****						
	Uplands Park Pavilion		20012 ****						
	Freer Centre								
	Freer Centre room hire (Fri) - first hour	EX	20004 9201		46.00	48.00	4.35%	2.00	
	Freer Centre room hire (Fri) - subsequent/part hour	EX	20004 9201		19.00	20.00	5.26%	1.00	
	Freer Centre room hire (Sat) - first hour	EX	20004 9201		53.00	55.00	3.77%	2.00	
	Freer Centre room hire (Sat) - subsequent/part hour	EX	20004 9201		19.00	20.00	5.26%	1.00	
	Freer Centre room hire (Sun) - first hour	EX	20004 9201		59.00	61.00	3.39%	2.00	
	Freer Centre room hire (Sun) - subsequent/part hour	EX	20004 9201		19.00	20.00	5.26%	1.00	
	NOTE: Room hire fee includes an inspection fee (Fri £20; Sat £26, Sun £32)								
	Non-commercial								
	First hour	EX	***** 9539	First Hour	26.00	27.00	3.85%	1.00	
	Each subsequent hour or part hour	EX	***** 9539	Per Hour	19.00	20.00	5.26%	1.00	
	Commercial								
	First hour	EX	***** 9538	First Hour	31.00	32.00	3.23%	1.00	
	Each subsequent hour or part hour	EX	***** 9538	Per Hour	22.00	23.00	4.55%	1.00	

Refundable deposit per booking (full or part)	EX	62023 9627	Deposit	100.00	100.00	0.00%	0.00
Charge for lost keys - in relation to late return fee below	EX	***** 9539	Each	23.00	24.00	4.35%	1.00
Late return of keys	EX	***** 9539	Per working day	15.00	16.00	6.67%	1.00
NOTE: Saturday evening hire - minimum charge of 4 hours booking from 5pm onwards							
8.4 ROOM HIRE PER HOUR - VATABLE PAVILIONS							
Thythorn Hill		20013 ****					
Coombe Park Pavilion		20015 ****					
Non-commercial							
First hour	SR	***** 9539	Per Hour	29.00	30.00	3.45%	1.00
Each subsequent hour or part hour	SR	***** 9539	Per Hour	22.00	23.00	4.55%	1.00
Commercial							
First hour	SR	***** 9538	Per Hour	37.00	38.00	2.70%	1.00
Each subsequent hour or part hour	SR	***** 9538	Per Hour	25.00	26.00	4.00%	1.00
Refundable deposit per booking (full or part)	EX	62023 9627	Deposit	100.00	100.00	0.00%	0.00
Charge for lost keys - in relation to late return fee below	EX	***** 9539	Each	23.00	24.00	4.35%	1.00
Late return of keys	EX	***** 9539	Per working day	15.00	16.00	6.67%	1.00
NOTE: Saturday evening hire - minimum charge of 4 hours booking from 5pm onwards							
CANCELLATION OF ROOM HIRE							
Cancellation with more than 8 weeks notice - return 100% of hire fee							
Cancellation less than 8 weeks but more than 6 weeks - return 75% of hire fee							
Cancellations less than 6 weeks but more than 14 days- return 50% of hire fee							
Cancellations less than 14 days but more than 7 days - return 25% of hire fee							
Cancellations with less than 7 days notice - hire fee not returned							
8.5 RECREATION GROUNDS							
Peace Memorial Park		20005 ****					
Uplands Park		20012 ****					
Thythorn Hill		20013 ****					
Willow Park		20014 ****					
Coombe Park		20015 ****					
Bowls							
Sheila Mitchell Pavilion		20005 ****					
Ellis Park Pavilion		20011 ****					
Season Ticket - Adult	SR	***** 9530	Each	115.00	119.00	3.48%	4.00
Half Season Ticket - Adult	SR	***** 9530	Each	57.00	59.00	3.51%	2.00
Season Ticket - Junior (under 18)	SR	***** 9530	Each	36.00	37.00	2.78%	1.00
Hourly Ticket - per person	SR	*****9532	Per Person	5.00	5.00	0.00%	0.00
Season Ticket - New member (one year introductory offer)	SR	***** 9530	Each	38.00	39.00	2.63%	1.00
Cricket							
Uplands Park		20012 ****					
Per match Vatable	SR	***** 9533	Per Match	96.00	100.00	4.17%	4.00
Per match Non Vatable	EX	***** 9534	Per Match	80.00	83.33	4.17%	3.33
Football - Junior Clubs (Under 10's and below)							
With shower facilities Vatable	SR	***** 9536	Per Booking	28.00	29.00	3.57%	1.00
With shower facilities non Vatable	EX	***** 9537	Per Booking	23.33	24.17	3.57%	0.83
Without shower facilities Vatable	SR	***** 9536	Per Booking	15.00	16.00	6.67%	1.00
Without shower facilities non Vatable	EX	***** 9537	Per Booking	12.50	13.33	6.67%	0.83

Academy (Coombe Park - subject to VAT at Standard Rate)	SR	*****	9536	Per Booking	210.00	218.00	3.81%	8.00
<b>Football - Youths (10 - 18 years)</b>								
With shower facilities Vatable	SR	*****	9536	Per Booking	51.00	53.00	3.92%	2.00
Without shower facilities Non Vatable	EX	*****	9537	Per Booking	25.00	26.00	4.00%	1.00
<b>Football - Senior Clubs (Over 18s)</b>								
With shower facilities Vatable	SR	*****	9536	Per Booking	76.00	79.00	3.95%	3.00
With shower facilities non Vatable	EX	*****	9537	Per Booking	63.33	65.83	3.95%	2.50
Without shower facilities Vatable	SR	*****	9536	Per Booking	38.00	39.00	2.63%	1.00
Without shower facilities non Vatable	EX	*****	9537	Per Booking	31.67	32.50	2.63%	0.83
Coombe Park & Thythorn Hill (Horsewell Lane) - subject to VAT at Standard Rate	SR	*****	9536	Per Booking	76.00	79.00	3.95%	3.00
<b>NOTE:</b> Bookings of 10 matches or more booked together are exempt from VAT (except Coombe Park & Thythorn)								
<b>Rounders - Senior Clubs (Over 18s)</b>								
Willow Park Vatable with changing rooms/showers	SR	20014	9536	Per booking	76.00	79.00	3.95%	3.00
Willow Park Non Vatable with changing rooms/showers	EX	20014	9537	Per booking	63.33	65.83	3.95%	2.50
Willow Park Vatable pitch only	SR	20014	9536	Per booking	38.00	39.00	2.63%	1.00
Willow Park Non Vatable pitch only	EX	20014	9537	Per booking	31.67	32.50	2.63%	0.83
<b>Rounders - Junior / Youth teams (under 18s)</b>								
Willow Park Vatable with changing rooms/showers	SR	20014	9536	Per booking	51.00	53.00	3.92%	2.00
Willow Park Non Vatable with changing rooms/showers	EX	20014	9537	Per booking	42.50	44.17	3.92%	1.67
Willow Park Vatable pitch only	SR	20014	9536	Per booking	25.00	26.00	4.00%	1.00
Willow Park Non Vatable pitch only	EX	20014	9537	Per booking	20.83	21.67	4.00%	0.83
<b>NOTE:</b> Bookings of 10 matches or more booked together are exempt from VAT (except Coombe Park and Thythorn Hill)								
<b>Fetes and Galas - Activities for commercial gain</b>								
Use of ground - per day	EX	*****	9552	Per Day	728.00	756.00	3.85%	28.00
Deposit - to be returned in part or whole dependent on condition of ground	OS	62023	9624	Deposit	1,213.00	1,259.00	3.79%	46.00
<b>Fetes and Galas - Community events supportive of Council priorities</b>								
Use of ground - per day	EX	*****	9552	Per Day	Free	Free	-	-
Deposit - to be returned in part or whole dependent on condition of ground	OS	62023	9624	Deposit	243.00	252.00	3.70%	9.00
Personal trainers and instructors - licence for use of parks	EX	*****	9552	12 months	182.00	189.00	3.85%	7.00
Personal trainers and instructors - licence for use of parks	EX	*****	9552	1 month	24.00	25.00	4.17%	1.00

NOTES

Deposits may be withheld in part or full for any damage caused and / or where the hirer fails to leave the building clean and tidy for the next user and / or where a hirer fails to remove and dispose of waste arising from their hire. An additional charge (over and above the deposit) is levied for the late return / non return of keys.

VAT Key:

EX Exempt

DESCRIPTION OF CHARGE		VAT	GL ACCOUNT CODE	UNIT	2025-2026 £	2026-2027 £	Percentage increase	£ increase	Notes
9	ALLOTMENTS								
9.1	RESIDENTS								
	Rent of plot to residents of the Borough*								
	Wigston Road	OS	20001 9552	Each	0.27	0.30	10.98%	0.03	
	Aylestone Lane	OS	20001 9552	Each	0.27	0.30	10.98%	0.03	
	Manchester Gardens - Rectangle	OS	20001 9552	Each	0.25	0.30	22.28%	0.05	
	Manchester Gardens - Triangle	OS	20001 9552	Each	0.22	0.25	13.45%	0.03	
	Brabazon Road	OS	20001 9552	Each	0.25	0.30	22.28%	0.05	
	<b>NOTE:</b> Allotment rent year runs from 29 September to 28 September the following year								
	<b>Senior Citizens</b>								
	25% reduction on the above charge								
9.2	DEPOSIT - REFUNDABLE	OS	20001 9622	Each	62.00	65.00	4.84%	3.00	
9.3	KEY - REPLACEMENT	SR	20001 9362	Each	23.00	25.00	8.70%	2.00	

\* Per square yard from 2023/24

DESCRIPTION OF CHARGE		VAT	GL ACCOUNT CODE	UNIT	2025-2026 £	2026-2027 £	Percentage increase	£ increase	Notes
10	SPECIAL COLLECTION OF HOUSEHOLD REFUSE								
10.1	COLLECTION OF HOUSEHOLD REFUSE								
For full details of non-electrical items that can be collected please refer to our website:									
www.oadby-wigston.gov.uk/pages/bulky_waste_collection									
or telephone the Customer Services Hotline (0116) 288 8961									
3 items	OS	20801 9310	Each	41.00	45.00	9.76%	4.00		
Each additional item	OS	20801 9310	Each	5.00	5.00	0.00%	0.00		
For full details of electrical items that can be collected please refer to our website:									
www.oadby-wigston.gov.uk/pages/bulky_waste_collection									
or telephone the Customer Services Hotline (0116) 288 8961									
1 Item	OS	20801 9310	Each	41.00	45.00	9.76%	4.00		
Each additional item	OS	20801 9310	Each	5.00	5.00	0.00%	0.00		
Residents on certain benefits can apply for an exemption, which will then entitle them to two collections during the financial year with up to a maximum of four items on each collection. For further details please refer to our website:									
www.oadby-wigston.gov.uk/pages/bulky_waste_collection									
or telephone the Customer Services Hotline (0116) 288 8961									
Contaminated Bins	OS	20801 9201	Each	56.00	60.00	7.14%	4.00		
10.2	GARDEN WASTE COLLECTION SERVICE								
This charge applies to 1 x 240 litre bin or up to 2 x 140 litre bins (also applies if there is only 1 x 140 litre bin)	OS	20805 9318	Each	60.00	60.00	0.00%	0.00		
This provides a fortnightly collection for 9 months during the year.									
Additional bins: 140Litres	OS	20805 9217	Each	25.00	27.50	10.00%	2.50		
Additional Bins: 240Litres	OS	20805 9217	Each	35.00	37.50	7.14%	2.50		
*See separate terms & conditions for further details									
Introduction of bin swaps	OS	20805 9217	Each	30.00	30.00	0.00%	0.00		
10.3	BULKY WASTE COLLECTION SERVICE								
Bulky waste charge	OS	20801 9310		41.00	45.00	9.76%	4.00		
10.4	DISPOSAL OF DECEASED DOMESTIC ANIMALS								
	SR	20701 9200	Each	75.00	80.00	6.67%	5.00		

VAT Key:  
EX Exempt  
OS Non Business  
SR Standard Rated  
ZR Zero Rated

DESCRIPTION OF CHARGE		VAT	GL ACCOUNT CODE	UNIT					Notes
					2025-2026 £	2026-2027 £	Percentage increase	£ increase	
11	COUNCIL CAR PARKS								TBC
11.1	COUNCIL CAR PARKS								
Pay and Display									
	Parking charge for stays of over 3 hours (where applicable)	SR	20501 9500	Each					
	Parking charge in 30 minute quick shop bays	SR	20501 9500	Each	FREE	FREE	-	-	
	Pay and Display - Town Centre car parks for up to 2 hours	SR	20501 9500	Each	1.50	1.60	6.67%	0.10	
	Pay and Display - Town Centre car parks for up to 2 - 4 hours	SR	20501 9500	Each	4.00	4.50	12.50%	0.50	
	Pay and Display - Town Centre car parks for over 4 hours	SR	20501 9500	Each	6.00	6.50	8.33%	0.50	
	Pay and Display - Leisure Centre Car Parks 2 hours	SR	20501 9500	Each	1.00	1.10	10.00%	0.10	
	Pay and Display - Leisure sites Car Parks for up to 4 hours	SR	20501 9500	Each	2.00	2.20	10.00%	0.20	
	Pay and Display - Leisure sites Car Parks over 4 hours	SR	20501 9500	Each	6.00	6.50	8.33%	0.50	
Parking Permits									
	Annual parking permit for all council car parks - Borough residents	SR	20501 9501	Each	150.00	165.00	10.00%	15.00	
	Annual parking permit for all council car parks - Non residents	SR	20501 9501	Each	300.00	330.00	10.00%	30.00	
	Annual parking permit for all town centre car parks only - Borough Residents	SR	20501 9501	Each	100.00	110.00	10.00%	10.00	
	Annual parking permit for all town centre car parks only - non residents	SR	20501 9501	Each	200.00	220.00	10.00%	20.00	
	Annual parking permit for Oadby town centre car parks only - Borough residents	SR	20501 9501	Each	50.00	55.00	10.00%	5.00	
	Annual parking permit for Oadby town centre car parks only - Non residents	SR	20501 9501	Each	100.00	110.00	10.00%	10.00	
	Annual parking permit for Wigston & South Wigston town centre car parks only - Borough residents	SR	20501 9501	Each	50.00	55.00	10.00%	5.00	
	Annual parking permit for Wigston & South Wigston town centre car parks only - Non residents	SR	20501 9501	Each	100.00	110.00	10.00%	10.00	
	Annual parking permit for Leisure sites car parks only - Borough residents	SR	20501 9501	Each	50.00	55.00	10.00%	5.00	
	Annual parking permit for Leisure sites car parks only - Non residents	SR	20501 9501	Each	100.00	110.00	10.00%	10.00	
	Annual parking permit Countesthorpe Road Car park only - Monday to Friday before 9.30am and 2.30pm to 4.00pm term time only - Borough residents and non residents	SR	20501 9501	Each	20.00	22.00	10.00%	2.00	
	6 month parking permit for all council car parks - Borough residents	SR	20501 9501	Each	75.00	83.00	10.67%	8.00	
	6 month parking permit for all council car parks - Non residents	SR	20501 9501	Each	150.00	165.00	10.00%	15.00	
	6 month parking permit for all town centre car parks only - Borough Residents	SR	20501 9501	Each	50.00	55.00	10.00%	5.00	
	6 month parking permit for all town centre car parks only - non residents	SR	20501 9501	Each	100.00	110.00	10.00%	10.00	
	6 month parking permit for Oadby town centre car parks only - Borough residents	SR	20501 9501	Each	25.00	28.00	12.00%	3.00	
	6 month parking permit for Oadby town centre car parks only - Non residents	SR	20501 9501	Each	50.00	55.00	10.00%	5.00	
	6 month parking permit for Wigston & South Wigston town centre car parks only - Borough residents	SR	20501 9501	Each	25.00	28.00	12.00%	3.00	
	6 month parking permit for Wigston & South Wigston town centre car parks only - Non residents	SR	20501 9501	Each	50.00	55.00	10.00%	5.00	
	6 month parking permit for Leisure sites car parks only - Borough residents	SR	20501 9501	Each	25.00	28.00	12.00%	3.00	
	6 month parking permit for Leisure sites car parks only - Non residents	SR	20501 9501	Each	50.00	55.00	10.00%	5.00	

VAT Key:  
EX Exempt  
OS Non Business  
SR Standard Rated  
ZR Zero Rated



OADBY AND WIGSTON BOROUGH COUNCIL CAPITAL PROGRAMME				2025/26										Funding									
Project Code Reference	Scheme	Budget Holder	Responsible Person	2025/26 Approved Budget	2024/25 Final C/F	Additions/Removals/Transfers	Slippage to 2026/27	2025/26 Total Budget	2026/27 Preliminary	2027/28 Preliminary	2028/29 Preliminary	2029/30 Preliminary	2030/31 Preliminary	Grant & S106	Capital Receipts GF	Capital Receipts HRA	1-4-1	Major Repairs Reserve	Reserves/Other Reserves	Revenue	Leasing Borrowing		
	Funding Available B/F Estimated Additions in Year																						
	Total Funding Available																						
	Housing Revenue Account																						
50003	Central Heating	Chris Eyre	James Waterton/ Darren Bates	0	(58,906)	258,906	0	200,000	200,000	175,000	175,000	175,000	175,000	0	0	0	0	1,100,000	0	0	0		
50006	Front & Rear Doors	Chris Eyre	James Waterton/ Darren Bates	125,000	1,264	223,736	(260,000)	90,000	145,000	145,000	145,000	145,000	145,000	0	0	0	0	815,000	0	0	0		
50009	Fire Safety Marriott House	Chris Eyre	James Waterton/ Darren Bates	0	(12,077)	12,077	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
50016	Decent Homes Work	Chris Eyre	James Waterton/ Darren Bates	1,500,000	(59,369)	(1,190,642)	0	250,000	250,000	0	0	0	0	0	0	0	0	250,000	0	0	0		
50017	Major Adaptations	Chris Eyre	James Waterton/ Darren Bates	0	91,482	108,518	0	200,000	200,000	200,000	200,000	200,000	200,000	0	0	0	0	1,200,000	0	0	0		
50019	Fire Safety	Chris Eyre	James Waterton/ Darren Bates	0	296,294	103,706	(150,000)	250,000	400,000	0	0	0	0	0	0	0	0	434,703	0	215,297	0		
50024	Ventilation Insulation	Chris Eyre	James Waterton/ Darren Bates	0	(13,394)	13,394	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
50029	New Housing Initiatives	Chris Eyre	Chris Eyre	1,772,499	(23,020)	121,208	(870,687)	1,000,000	2,213,400	1,466,400	1,197,682	507,600	517,000	1,304,000	0	0	4,168,082	19,994	0	472,652	937,350		
50041	Stock Condition Survey	Chris Eyre	James Waterton/ Darren Bates	0	130,000	(130,000)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
50046	Kitchen Replacements Decent Homes, incl Bathrooms	Chris Eyre	James Waterton/ Darren Bates	0	(12,490)	12,490	0	0	510,000	490,000	490,000	490,000	490,000	0	0	296,918	0	1,599,000	0	41,081	533,001		
50047	Housing Block Improvements	Chris Eyre	James Waterton/ Darren Bates	0	0	300,000	(100,000)	200,000	150,000	150,000	150,000	150,000	150,000	0	0	0	0	950,000	0	0	0		
50049	Horsewell Lane housing development, Modular Build	Chris Eyre	James Waterton/ Darren Bates	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
50050	Decarbonisation of Housing Stock	Chris Eyre	Chris Eyre	198,453	(101,559)	(96,894)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
50051	Boulter Crescent Housing	Chris Eyre	James Waterton/ Darren Bates	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
50052	Damp & Mould Works	Chris Eyre	James Waterton/ Darren Bates	0	0	100,000	0	100,000	100,000	100,000	100,000	100,000	100,000	0	0	0	0	600,000	0	0	0		
	Windows	Chris Eyre	James Waterton/ Darren Bates	0	0	0	0	0	225,000	225,000	225,000	225,000	225,000	0	0	0	0	1,125,000	0	0	0		
	Lift replacement/ refurbishment	Chris Eyre	James Waterton/ Darren Bates	0	0	0	0	0	75,000	55,000	55,000	55,000	55,000	0	0	0	0	185,000	0	0	0		
	Roof replacement	Chris Eyre	James Waterton/ Darren Bates	0	0	0	0	0	325,000	325,000	325,000	325,000	325,000	0	0	0	0	1,625,000	0	0	0		
	Capitalisation Of Salaries			0	0	163,500	0	163,500	173,100	177,400	169,000	172,300	175,700	0	0	0	0	505,600	0	383,733	141,667		
	Total - HRA			3,595,952	238,236	0	(1,380,687)	2,453,501	4,716,500	3,508,800	3,231,682	2,489,900	2,502,700	1,304,000	0	296,918	4,168,082	10,409,297	0	1,112,763	1,612,022		
	General Fund - Service Delivery																						
52002	Disabled Facilities Grant	Adrian Thorpe		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
52092	Oadby Pool Housing Project	Adrian Thorpe		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
52094	Boulter Crescent Flat Conversion	Adrian Thorpe		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
53910	UKSPF Street Furniture New Equipment	Trish Hutton	Tom Maccabe	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
53916	UKSPF Play Area	Trish Hutton	Tom Maccabe	81,000	0	0	0	81,000	0	0	0	0	0	81,000	0	0	0	0	0	0	0		
53917	UKSPF Green Initiatives	Trish Hutton	Tom Maccabe	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
54003	Brocks Hill Drainage	Ben Wilson		30,000	0	11,400	0	41,400	0	0	0	0	0	0	0	41,400	0	0	0	0	0		
54010	Play Area Refurbishments	Ben Wilson		0	0	0	0	0	244,850	0	0	7,500	0	0	0	252,350	0	0	0	0	0		
54017	Christmas Decoration Infrastructure	Adrian Thorpe	Mark Hyniwi	7,500	0	0	0	7,500	8,000	7,500	7,500	0	0	0	0	30,500	0	0	0	0	0		
54068	Parklands Improvements	Ben Wilson	Tom Maccabe	70,500	0	0	0	70,500	0	0	0	0	0	0	0	70,500	0	0	0	0	0		
54094	Website accessibility	Trish Hutton	Robert Hellwell	0	5,000	(5,000)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
54108	Toro Triple Mower rep 7032	Ben Wilson		0	0	50,125	0	50,125	0	0	0	0	0	0	0	50,125	0	0	0	0	0		
54128	Ride on Mower Cemeteries	Ben Wilson		0	0	10,692	0	10,692	0	0	0	0	0	0	0	10,692	0	0	0	0	0		
54133	Replacement RCV	Ben Wilson	Brian Kew	0	0	503,596	0	503,596	0	0	0	0	0	0	0	503,596	0	0	0	0	0		
54147	Recycling Wheelie Bins	Ben Wilson	Brian Kew	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
54150	CCTV Cameras	Ben Wilson	Jon Wells	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
54151	Air Quality Monitoring	Ben Wilson	Jon Wells	0	0	39,805	0	39,805	0	0	0	0	0	0	0	39,805	0	0	0	0	0		
54159	Pay & Display Scheme	Ben Wilson		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
54192	Vehicle Refurbishment	Ben Wilson	Brian Kew / Jon Faulconbridge	1,164,199	42,290	(852,103)	0	354,387	285,000	250,000	750,000	320,000	0	0	1,959,387	0	0	0	0	0	0		
54199	Waste Transformation	Ben Wilson		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
54203	Food Waste Project	Ben Wilson		0	0	579,690	0	579,690	0	0	0	0	0	0	0	579,690	0	0	0	0	0		
54204	Cemetery Rear Tipper	Ben Wilson		0	22,000	3,582	0	25,582	0	0	0	0	0	0	0	25,582	0	0	0	0	0		
54205	SCARAB Merlin 62 Road Sweeper	Ben Wilson		0	0	169,381	0	169,381	0	0	0	0	0	0	0	169,381	0	0	0	0	0		
54206	KARCHER MC250 Road Sweeper	Ben Wilson		0	0	86,000	0	86,000	0	0	0	0	0	0	0	86,000	0	0	0	0	0		
54207	Alotment Improvement Works	Ben Wilson		0	0	115,000	0	115,000	0	0	0	0	0	0	0	115,000	0	0	0	0	0		
54222	New Facility at Uplands Park	Ben Wilson		0	134,363	149,893	0	284,256	0	0	0	0	0	0	0	284,256	0	0	0	0	0		
54276	Repairs to play area surface various play areas	Ben Wilson		0	9,510	35,000	0	44,510	0	0	0	0	0	0	0	9,510	0	0	35,000	0	0		
54579	Willow Park Skate Park	Ben Wilson		0	0	11,982	0	11,982	0	0	0	0	0	0	0	11,982	0	0	0	0	0		
54590	Wigston Pool Photovoltaics	Ben Wilson		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
54592	Brooks Hill Barn Portacabin	Ben Wilson		0	18,000	0	0	18,000	0	0	0	0	0	0	0	18,000	0	0	0	0	0		
54594	Wigston Cemetery Mess Room	Ben Wilson		0	15,000	0	0	15,000	0	0	0	0	0	0	0	15,000	0	0	0	0	0		
54595	Parklands Photovoltaics	Ben Wilson	Tom Maccabe	0	0	156,704	0	156,704	0	0	0	0	0	0	0	156,704	0	0	0	0	0		
54596	Fortis Mower	Ben Wilson		0	0	28,727	0	28,727	0	0	0	0	0	0	0	28,727	0	0	0	0	0		
56003	Customer Services	Trish Hutton		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
56010	IT replacements	Trish Hutton	Ravinder Gill	66,000	0	3,560	0	69,560	66,000	50,000	66,000	66,000	0	0	0	317,560	0	0	0	0	0		
56027	41 Canal St CPO	Colleen Warren	Colleen Warren / Sam Ball	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
56055	Document Management System Software	Trish Hutton		0	6,454	0	0	6,454	0	0	0	0	0	0	0	6,454	0	0	0	0	0		
56072	South Wigston Shop Fronts	Adrian Thorpe	Mark Hyniwi	1,992	(1,992)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
56085	New Council Offices	Adrian Thorpe	Ben Wilson	10,000	5,277	0	0	15,277	0	0	0	0	0	0	0	15,277	0	0	0	0	0		
56092	Laptop Renewal	Ben Wilson	Ravinder Gill	0	3,560	(3,560)	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
56101	Sale of Bushloe House	Ben Wilson		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
56102	Webpay 2 Implementation	Colleen Warren		26,000	(8,000)	0	0	18,000	0	0	0	0	0	0	0	18,000	0	0	0	0	0		
56103	Server Host Refresh	Ben Wilson	Ravinder Gill	0	0	39,966	0	39,966	0	0	0	0	0	0	0	39,966	0	0	0	0	0		
56104	Sale of Bushloe House	Ben Wilson		0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0		
	Cricknet Nets at Uplands Park	Ben Wilson		40,000	0	20,000	0	60,000	0	0	0	0	0	60,000	0	0	0	0	0	0	0		
	Finance System Upgrade	Colleen Warren	Simon Ball	80,000	0	0	0	80,000	0	0	0	0	0	0	0	80,000	0	0	0	0	0		
	Invest to Save	Ben Wilson		212,589	(80,365)	(39,966)	0	92,258	0	0	0	0	0	0	0	92,258	0	0	0	0	0		
	Replacement of cemeteries vehicles- Mower trailer	Ben Wilson		0	25,000	0	0	25,000	0	0	0	0	0	0	0	25,000	0	0	0	0	0		
	Replacement of Grounds Maintenance Dennis bowling green mower	Ben Wilson		0	15,000	0	0	15,000	0														



<b>Policy, Finance and Development Committee</b>	<b>Tuesday, 03 February 2026</b>	<b>Matter for Decision</b>
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**Report Title:** **Leicester & Leicestershire Authorities - Statement of Common Ground Relating to Housing Distribution Following NPPF and New Standard Method**

**Report Author(s):** **Ed Morgan (Senior Planning Policy Officer)**

<b>Purpose of Report:</b>	The purpose of this report is to seek Committee's approval on the Leicester and Leicestershire Statement of Common Ground relating to Housing Distribution that has been jointly prepared by Local Authorities within the Leicester and Leicestershire (L&L) Housing Market Area (HMA). It represents an up-to-date factual statement of the current position in Leicester and Leicestershire.
<b>Report Summary:</b>	This report provides information on a Statement of Common Ground (SoCG) which has been prepared by the Leicester and Leicestershire authorities to demonstrate co-operation in plan making. The key strategic matters covered are Leicester and Leicestershire housing needs to 2046; unmet need to 2046; and apportioning any unmet need to 2046.
<b>Recommendation(s):</b>	<b>That the Committee approves the signing of the Statement of Common Ground (SoCG) which has been prepared by the Leicester and Leicestershire authorities.</b>
<b>Senior Leadership, Head of Service, Manager, Officer and Other Contact(s):</b>	<p>Teresa Neal (Strategic Director) (0116) 257 2642 <a href="mailto:teresa.neal@oadby-wigston.gov.uk">teresa.neal@oadby-wigston.gov.uk</a></p> <p>Adrian Thorpe (Head of The Built Environment) (0116) 257 2645 <a href="mailto:adrian.thorpe@oadby-wigston.gov.uk">adrian.thorpe@oadby-wigston.gov.uk</a></p> <p>Jamie Carr (Planning Policy &amp; Development Manager) (0116) 257 2652 <a href="mailto:jamie.carr@oadby-wigston.gov.uk">jamie.carr@oadby-wigston.gov.uk</a></p> <p>Ed Morgan (Senior Planning Policy Officer) (0116) 257 2650 <a href="mailto:ed.morgan@oadby-wigston.gov.uk">ed.morgan@oadby-wigston.gov.uk</a></p>
<b>Strategic Objectives:</b>	<p>Our Council (SO1)</p> <p>Our Communities (SO2)</p> <p>Our Economy (SO3)</p> <p>Our Environment (SO4)</p> <p>Our Partners (SO5)</p>
<b>Vision and Values:</b>	<p>"Our Borough - The Place To Be" (Vision)</p> <p>Customer &amp; Community Focused (V1)</p>
<b>Report Implications:-</b>	

Legal:	There are no implications arising from this report.
Financial:	There are no implications arising from this report.
Corporate Risk Management:	Political Dynamics (CR3) Reputation Damage (CR4) Key Supplier / Partnership Failure (CR2) Economy / Regeneration (CR9)
Equalities and Equalities Assessment (EA):	There are no implications arising from this report. EA not applicable
Human Rights:	There are no implications arising from this report.
Health and Safety:	There are no implications arising from this report.
<b>Statutory Officers' Comments:-</b>	
Head of Paid Service:	The report is satisfactory.
Chief Finance Officer:	The report is satisfactory.
Monitoring Officer:	The report is satisfactory.
<b>Consultees:</b>	None.
<b>Background Papers:</b>	None.
<b>Appendices:</b>	<b>1.</b> Leicester & Leicestershire Authorities - Statement of Common Ground Relating to Housing Distribution Following NPPF and New Standard Method.

## 1. Information

- 1.1 As part of the Local Plan process, local planning authorities must cooperate with their neighbouring local authority areas on strategic matters, including housing growth. A Statement of Common Ground (SoCG) is one of the mechanisms available to evidence that this has been achieved. Across Leicester and Leicestershire (L&L), the local planning authorities are progressing their respective plans, although each is currently at a different stage of development.
- 1.2 It should be noted that whilst the Minister of State for Housing and Planning wrote to Local Planning Authorities on 27 November 2025 stating the intention that the Duty to Co-operate is to be removed from Legislation the letter also says that 'LPAs should continue to collaborate across their boundaries, including on unmet development needs from neighbouring areas' and therefore this SoCG meets that requirement.
- 1.3 In December 2024, the new Standard Method was published alongside the revised National Planning Policy Framework (NPPF, 12 December 2024). While this resulted in only a modest change to the overall housing need for the Leicester and Leicestershire (L&L) Housing Market Area (HMA), the distribution of that need shifted significantly due to the removal of the 35% urban uplift for Leicester City. As a result, the Local Housing Need (LHN) in Leicester City reduced substantially,

whereas the LHN increased markedly across most other Districts and Boroughs within the HMA.

- 1.4 The L&L Housing and Economic Needs Assessment (HENA) 2022 was prepared using the Standard Method as it applied in March 2022, identifying a requirement for 5,713 dwellings per annum across the Housing Market Area (HMA). The accompanying HENA 2022 Housing Distribution Paper set out an agreed methodology for distributing Leicester City's unmet housing need, then assessed at 18,700 homes, alongside 23 hectares of unmet employment land need for the period 2020–2036.
- 1.5 Members will be aware that a SoCG was produced in 2022 to set out the process for apportioning Leicester's unmet housing need across the Housing Market Area (HMA). The SoCG stated: "*The key strategic matters covered in this statement under the Duty to Cooperate are: Leicester and Leicestershire Housing and Employment Needs to 2036, Unmet Need to 2036, and the process of apportioning unmet need to 2036. This statement will be reconfirmed and updated as necessary, including for subsequent authorities' Local Plans.*" The Council approved the signing of the previous version of the SoCG in 2022.
- 1.6 Following publication of the revised Standard Method in December 2024, Leicester City's Local Housing Need (LHN) reduced substantially, resulting in a significant reduction in the scale of unmet housing need to be addressed elsewhere in the HMA. Consequently, it became necessary to revisit the HENA Housing Distribution Paper to provide an up-to-date basis for Local Plans that are using the new Standard Method and are due for submission by the December 2026 deadline, as well as for future Local Plan reviews across the HMA.
- 1.7 The authorities agreed to commission an update to the HENA 2022 Housing Distribution Paper to inform the apportionment of unmet housing need under the revised Standard Method (December 2024).

#### **Key Strategic Matters on Which the Authorities Agree**

- 1.8 The authorities agree that there is a long-established and effective track record of joint working on cross-boundary strategic matters across L&L. This collaborative approach has consistently encompassed the key strategic issues identified in this statement. The authorities have maintained ongoing engagement with one another on these matters throughout the preparation of Local Plans across the HMA.
- 1.9 The authorities agree that the LHN is derived using the new standard method for the 2024-2046 period, although it is accepted that individual local plans may have a shorter plan period than to 2046.
- 1.10 It is also agreed that the NPPF 2023 and L&L Statement of Common Ground relating to Housing and Employment Land Needs (June 2022) apply to local plans that reached examination or Regulation 19 on or before 12 March 2025. This is set out in the L&L Duty to Cooperate Statement (February 2025). For local plans that reach Regulation 19 after 12 March 2025 but before 31 December 2026, the NPPF 2024 (or relevant future iterations) and this Statement of Common Ground will

apply. These two Statements of Common Ground will co-exist to enable full local plan coverage across L&L.

### **Statement of Common Ground (2025-26)**

- 1.11 This L&L Statement of Common Ground is supported by evidence from the HENA Updated Housing Distribution Paper (UHDP), produced by Iceni on behalf of the authorities. The update provides a new Housing Distribution Paper to replace the version that accompanied the L&L HENA published in June 2022. The authorities agree that the UHDP sets out the apportionment of Leicester City's unmet housing need across the L&L Housing Market Area (HMA), arising from application of the new Standard Method up to 2046.
- 1.12 The UHDP recalculates Leicester City's unmet housing need for the period 2024–2036 as 2,455 dwellings, based on the revised Standard Method and the housing provision figures in the Leicester Local Plan. It also sets out the approach used to identify post-2036 housing capacity within the City. Leicester City continues to experience unmet housing need; using a proportionate evidence base, the UHDP estimates that between 2036 and 2046 the City will have an additional unmet need of 8,230 dwellings.
- 1.13 In the case of Oadby and Wigston, the Council has undertaken additional evidence gathering on housing capacity to assess developable and deliverable land within the Borough in light of the increase in LHN from 189 to 389 homes per year. Based on the evidence available at the stage of writing this Statement of Common Ground, and for the purposes of this Statement of Common Ground only, it is assumed that Oadby and Wigston can meet its own housing need from a land supply perspective but cannot accommodate any unmet need from Leicester City. Further work is still being carried out by the Council to assess the Borough's ability to accommodate the uplifted LHN, and once complete, the HMA authorities will need to consider its implications.
- 1.14 It is therefore agreed that at such time, the SoCG will be reconfirmed and updated accordingly through the joint working of the L&L authorities.

## **2. Conclusion**

- 2.1 Officers have been working with their counterparts from the other local planning authorities within the L&L HMA in the apportionment and management of housing growth for the period 2024-2046.
- 2.2 It is therefore important that Councils sign the SoCG to enable continued progression of Local Plan work. It should be noted that the LHN figure referenced in paragraph 1.13 of this Report and in the attached SoCG is the figure that will be fully tested through the Local Plan process, such that the requirement set out in the Local Plan is entirely evidence-led.
- 2.3 It should be noted by Members that the appendices to the SoCG are existing documents that have previously been published.
- 2.4 The SoCG is also being considered by all other local authorities in L&L with the same recommendation for approval.

## **Leicester & Leicestershire Authorities - Statement of Common Ground relating to Housing Distribution following NPPF and new Standard Method published December 2024 (December 2025)**

### **1.0 The Leicester and Leicestershire HMA and FEMA**

- 1.1 The Leicester and Leicestershire Housing Market Area (HMA) and Functional Economic Market Area (FEMA) covers the administrative areas of eight local planning authorities and two transport authorities. The eight local planning authorities responsible for plan making are:
- Blaby District Council
  - Charnwood Borough Council
  - Harborough District Council
  - Hinckley & Bosworth Borough Council
  - Leicester City Council (Unitary)
  - Melton Borough Council
  - North West Leicestershire District Council
  - Oadby & Wigston Borough Council
- 1.2 The two upper tier authorities in Leicester and Leicestershire (L&L), with statutory responsibilities for transportation, education, social care, flooding, minerals & waste planning and public health are:
- Leicester City Council (Unitary)
  - Leicestershire County Council
- 1.3 This Statement has been prepared jointly by the eight plan making authorities and Leicestershire County Council as an additional signatory given their statutory responsibilities, hereafter referred to as “the authorities”. The Map in Appendix 1 shows the location and administrative areas covered by this statement. The Leicester & Leicestershire Housing & Economic Needs Assessment (June 2022), to which the Updated Housing Distribution Paper (November 2025) relates, identifies this area as the Leicester & Leicestershire HMA and FEMA.

### **2.0 Background and Context**

- 2.1 In December 2024 the new Standard Method was published alongside a new National Planning Policy Framework (NPPF, 12 December 2024). This changed the overall scale of housing to be provided for in the L&L Housing Market Area (HMA) by a relatively small amount, however, the distribution across the L&L HMA significantly changed due to the deletion of the 35% urban uplift. The effect of this was to significantly reduce Local Housing Need (LHN) in Leicester City, whilst the LHN in most other Districts and Boroughs significantly increased.
- 2.2 Following the publication of the new NPPF, the authorities prepared the “Duty to Co-operate Statement – Transitional arrangements in respect of unmet need” (February 2025). This confirms and clearly sets out how all partners are progressing local plans, and in particular how to deal with the matter of unmet need in the absence of specific

reference to this issue in the Transitional arrangements<sup>1</sup>. This Duty to Cooperate Statement (DtC Statement February 2025) is available at Appendix 2.

- 2.3 The L&L Housing & Economic Needs Assessment June 2022 (HENA 2022) was based on the assessment of local housing need using the Standard Method in March 2022. This showed a need for 5,713 dpa across the HMA. The HENA 2022 Housing Distribution Paper set out an agreed methodology for apportioning Leicester City's unmet housing need (at the time of 18,700 homes) and 23ha of employment need (2020 to 2036). Following publication of the new Standard Method and the reduction in Leicester City's LHN, the scale of unmet housing need was significantly reduced. It was therefore necessary to revisit the HENA's Housing Distribution Paper to inform the Local Plans which are utilising the new Standard Method and will be submitted by the December 2026 deadline, together with future Local Plan reviews within the HMA.
- 2.4 The authorities agreed to commission an update to the HENA 2022 Housing Distribution Paper to inform the apportionment of unmet need under the new Standard Method (December 2024).

### **3.0 Purpose**

- 3.1 In accordance with paragraph 25 of the NPPF (2024), the key strategic matters addressed in this statement are: Duty to Cooperate and joint working; L&L housing needs to 2046 under the new Standard Method (December 2024); unmet need to 2046; and apportionment of unmet need to 2046. This statement has been prepared in accordance with paragraph 28 of the NPPF (2024) and will support the submission of four local plans in Leicestershire directly affected by these matters – Blaby District Council, Hinckley & Bosworth Borough Council, North West Leicestershire District Council and Oadby & Wigston Borough Council – by the 31 December 2026 deadline. These four local plans are referred to as Tranche 3 Local Plans in the DtC Statement (February 2025) and hereafter in this statement. This statement will be reconfirmed and updated for subsequent authorities' local plans.

### **4.0 Key Strategic Matters on which the Authorities agree**

#### Duty to Cooperate and Joint Working

- 4.1 The authorities agree there is a long track record of effective joint working on cross-boundary strategic matters across L&L and that these include the key strategic matters identified in this statement. The authorities have continuously engaged with each other on the strategic matters set out in this statement and throughout the preparation of Local Plans across the area. This is most clearly evidenced by:
- The continued function of the L&L Members Advisory Group and Strategic Planning Group
  - The joint preparation of evidence, including the update to the 2022 Housing and Economic Needs Assessment (2025), L&L Strategic Distribution Floorspace Needs Update and Apportionment (2025), South Leicestershire Joint Transport Evidence

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<sup>1</sup> As set out in Annex 1 of the December 2024 NPPF.



(2025), Strategic Growth Options and Constraints Mapping Study (2023), and Strategic Transport Assessment Stage 1 (2023).

- The adoption of a non-statutory Strategic Growth Plan 2018
- The L&L Authorities - Statement of Common Ground relating to Housing and Employment Land Needs (June 2022) (Appendix 3)<sup>2</sup>
- The agreement of Joint Statements of Cooperation in 2017, 2018, 2020 and 2021 (available on the [Strategic Growth Plan website](#))

- 4.2 More information and details of engagement will be set out in individual authority's Duty to Cooperate/Maintaining Effective Cooperation Statements that accompany local plans. Authorities will continue to engage on an ongoing basis.

L&L Housing Needs to 2046 under the new Standard Method (Dec 2024)

- 4.3 The authorities agree that local housing need is derived using the standard method and that for the 2024-2046 period is as set out in Table 1 below. This table does not apply for local plans being prepared in accordance with the Transition Arrangements set out in Annex 1 of the NPPF (2024) where the previous standard method calculation applies. Individual local plans may have a shorter plan period than to 2046.

**Table 1: Local Housing Need, Standard Method, May 2025**

Local Planning Authority	Total Housing Need	Houses per year
	2024-2046	2024-2046
Blaby District Council	11,858	539
Charnwood Borough Council	21,824	992
Harborough District Council	16,170	735
Hinckley and Bosworth Borough Council	14,586	663
Leicester City Council	34,936	1,588
Melton Borough Council	8,118	369
North West Leicestershire District Council	13,574	617
Oadby and Wigston Borough Council	8,558	389
Leicester and Leicestershire HMA Total	129,624	5,892

- 4.4 The authorities agree that the NPPF 2023 and L&L Statement of Common Ground relating to Housing and Employment Land Needs (June 2022) apply to local plans that reached examination or Regulation 19 on or before 12 March 2025. This is set out in the DtC Statement (February 2025). For local plans that reached Regulation 19 after 12 March 2025 but before 31 December 2026, the NPPF 2024 (or relevant future iterations)

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<sup>2</sup> Appendices E to J of the June 2022 Statement of Common Ground are available on the Strategic Growth Plan website

and this Statement of Common Ground will apply. These two Statements of Common Ground will co-exist to enable full local plan coverage across L&L.

- 4.5 Leicester City Council will begin a Local Plan Review immediately following the adoption of the Leicester City Local Plan 2020 to 2036. This will be informed by additional evidence in due course that will be used to identify the full housing capacity for that review.

#### Housing Distribution Update and Unmet Need to 2046

- 4.6 This L&L Statement of Common Ground is supported by evidence from the HENA Updated Housing Distribution Paper (UHDP) produced by Iceni on behalf of the authorities and published on the [Strategic Growth Plan website](#). The update provides a new Housing Distribution Paper to that published to accompany the L&L HENA published in June 2022. The authorities agree that the UHDP sets out the apportionment of Leicester City's unmet housing need in the L&L HMA arising from the use of the new Standard Method up to 2046.
- 4.7 The UHDP recalculates the level of unmet need for Leicester City from 2024 to 2036 to be a total of 2,455 dwellings, based on the new standard method and housing provision figures set out in the Leicester Local Plan. The UHDP also sets out the approach that has been used to identify a housing capacity for the City after 2036. Leicester City has a continuing unmet need for housing; using a proportionate evidence base the UHDP indicates that for the period 2036 – 2046 Leicester City has an estimated unmet need of 8,230 dwellings.
- 4.8 Oadby & Wigston Borough Council has undertaken further evidence to assess the housing capacity and developable and deliverable land within the Borough to accommodate the increase in Local Housing Need from 189 to 389 homes per year. From the evidence available at this time, for the purpose of this Statement of Common Ground, it has been assumed that Oadby & Wigston will just be able to meet its own need from a land supply position but not be able to accept any unmet need from Leicester. Evidence gathering is still being undertaken by the Council in relation to accommodation of the uplifted LHN and when complete, consideration will need to be given to the outcome of this by the HMA authorities.

#### Housing Requirement Figures for Tranche 3 Local Plans – Apportionment of Unmet Need to 2046

- 4.9 The authorities agree that the apportioned contributions to unmet need established through the UHDP and set out in Table 2 below will be used by those authorities submitting a local plan for examination under the NPPF December 2024 using the current planning system as governed by the Town and Country Planning Act 1990 (as amended).
- 4.10 As circumstances change through the availability of new evidence this will be considered by the authorities and future Statements of Common Ground may be needed. However, to enable proactive, timely local plan-making for the four Tranche 3

Local Plans, the figures in Table 2 below will be used and remain in place for the submission of the four Tranche 3 Local Plans before 31 December 2026. The housing requirement for individual Tranche 3 Local Plans will depend on their plan periods, as the contribution to unmet need is different for the period *to* 2036 and the period *after* 2036.

**Table 2: Annualised Apportionment of Unmet Need from 2024 over relevant plan periods**

	<b>Revised Standard Method dpa (December 2024)</b>	<b>Proposed Housing Requirement dpa</b>	<b>Contribution to Unmet Need dpa</b>	<b>% Contribution</b>	<b>Plan End Date*</b>
<b>Blaby</b>	539	654	115	25.1	2042
<b>Charnwood</b>	992	1,133	141	30.8	2046
<b>Harborough</b>	735	797	62	13.5	2046
<b>Hinckley &amp; Bosworth</b>	663	711	48	10.5	2045
<b>Melton</b>	369	388	19	4.2	2046
<b>NW Leicestershire</b>	617	690	73	15.9	2042
<b>Oadby &amp; Wigston</b>	389	389	0	0	2042
<b>Leicestershire Total</b>	4,304	4,762	458	100	

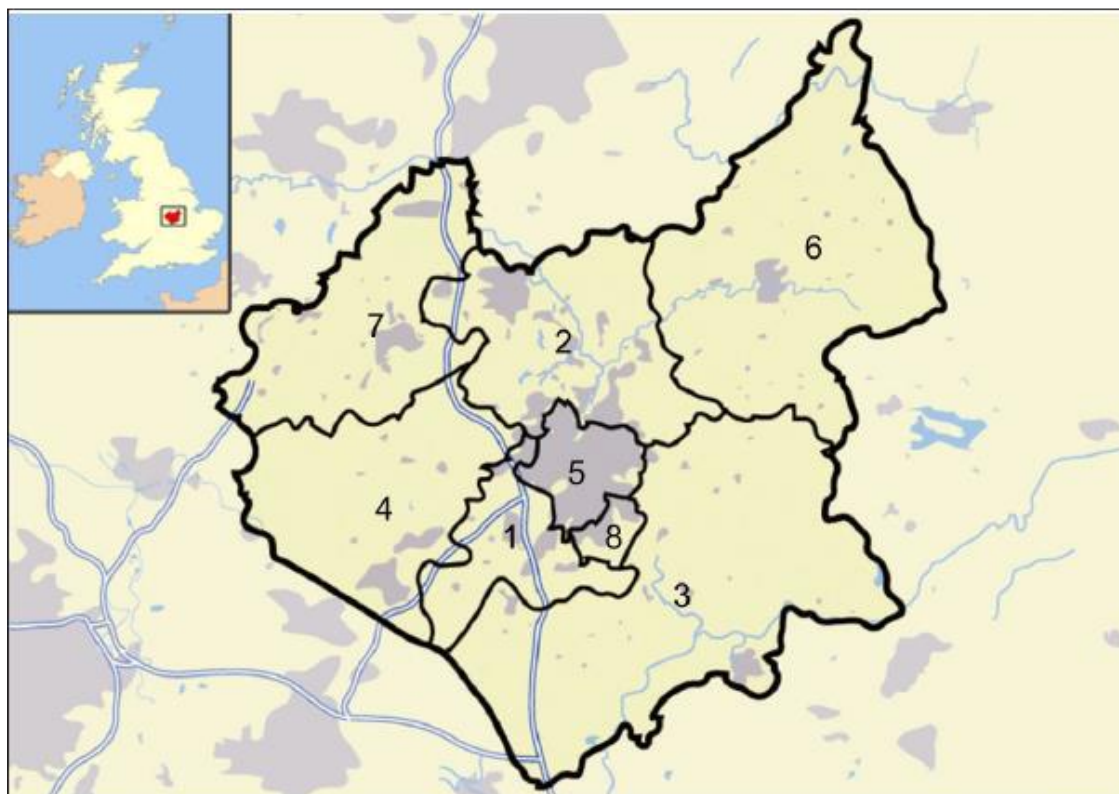
\*NB 2046 is used as the default plan end date in the UHDP for non-Tranche 3 local plans.

## **5.0 Maintaining and Updating this Statement**

- 5.1 The authorities acknowledge that this statement is necessary to progress the four Tranche 3 local plans under the current planning system as governed by the Town and Country Planning Act 1990 (as amended).
- 5.2 A new local planning system will be introduced early in 2026 together with the introduction of Spatial Development Strategies, through which local housing needs will be distributed across a geography that is yet to be determined. The formal duty to produce Spatial Development Strategies is expected in Spring 2026 through secondary legislation, following the expected royal assent of the Planning and Infrastructure Bill.
- 5.3 Government is seeking full coverage of up-to-date local plans, and the Tranche 3 local plans are at an advanced stage of preparation. The authorities agree that the figures set out in Table 2 will be tested through each Tranche 3 authority's local plan process.
- 5.4 This statement will be reconfirmed and updated for subsequent authorities' local plans through the joint working of the authorities.

## Appendix 1

**Map showing administrative areas covered by 2025 Statement of Common Ground relating to Housing Distribution under the new Standard Method**



### Key to Map

- |  |   |
|--|---|
| 1. Blaby District Council                | 5. Leicester City Council                     |
| 2. Charnwood Borough Council             | 6. Melton Borough Council                     |
| 3. Harborough District Council           | 7. North West Leicestershire District Council |
| 4. Hinckley and Bosworth Borough Council | 8. Oadby and Wigston Borough Council          |

## Appendix 2

### **DUTY TO CO-OPERATE STATEMENT TRANSITIONAL ARRANGEMENTS IN RESPECT OF UNMET NEED**

**BLABY DISTRICT COUNCIL**  
**CHARNWOOD BOROUGH COUNCIL**  
**HARBOROUGH DISTRICT COUNCIL**  
**HINCKLEY AND BOSWORTH BOROUGH COUNCIL**  
**LEICESTER CITY COUNCIL**  
**LEICESTERSHIRE COUNTY COUNCIL**  
**MELTON BOROUGH COUNCIL**  
**NORTH-WEST LEICESTERSHIRE DISTRICT COUNCIL**  
**OADBY AND WIGSTON BOROUGH COUNCIL**

#### **1. Purpose**

- 1.1 The purpose of this joint statement is to support the progression and adoption of our current and future Local Plans and Spatial Development Strategy (SDS).
- 1.2 To confirm the agreed position of all partner councils on arrangements to deal with existing unmet need and to confirm the agreed way forward through the Dec 2024 NPPF transitional period into the new Planning system.
- 1.3 This statement will be used to provide an updated position to appointed Inspectors for Plans currently being Examined, and for use in preliminary discussions with PINs for emerging Plans.

#### **2. Background**

- 2.1 L&L councils have a long standing and exemplary track record in joint planning as evidenced by the preparation and adoption of the [Strategic Growth Plan LCC](#) and the 2022 [Publication of Statement of Common Ground relating to Housing and Employment Land Needs - Strategic Growth Plan LCC | Strategic Growth Plan LCC](#)
- 2.2 L&L councils are keen to maintain momentum on Local Plan making, are committed to supporting plan progression through the changing legislative context and to begin to make preparations for emerging SDS requirements.
- 2.3 This statement confirms how all partners have agreed to progress plans, and in particular how to deal with the matter of unmet need in the absence of specific reference to this issue in the Transitional arrangements as set out in Annex 1 of the December 2024 [National Planning Policy Framework - GOV.UK](#)

#### **3. Current position**

- 3.1 The current position in respect of Plan preparation and adoption in the area is set out in Table 1 Plan Tracker below:

<b>Table 1: L&amp;L DtC Plan Tracker</b>					
<b>Tranche</b>	<b>Council</b>	<b>Plan stage/LDS Position</b>	<b>Relevant NPPF/Plan system</b>	<b>Agreed Mechanism to determine Unmet Need to support Plan</b>	<b>Comments</b>
<b>Tranche 1: Already Submitted.</b>  <b>Projected adoption 2025</b>	Charnwood Borough Council	Main Examination Hearings completed 2024; to be reconvened early 2025 Adoption Spring/Summer 2025	Dec 2023 NPPF	June 2022 SoCG Examination Document EX43	Reconvened hearing session to consider CIL Viability Assessment report in early 2025
	Leicester City	Main Examination Hearings completed November 2024  Modifications Consultation planned Spring 2025  Adoption Summer 2025	Dec 2023 NPPF	June 2022 SoCG Examination Document SCG/1	Commitment to Immediate Review on adoption of Plan
<b>Tranche 2: Submission anticipated 2025.</b> <b>Projected Adoption 2026</b>	Melton	Partial Review Reg 19 Consultation to be concluded by February 2025	Dec 2023 NPPF (Transition Period Under para 234 of 2024 NPPF)	June 2022 SoCG	
	Harborough	Reg 19 Consultation March 2025	Dec 2023 NPPF (Transition Period Under para 234 of 2024 NPPF)	June 2022 SoCG	

Tranche	Council	Plan stage/LDS Position	Relevant NPPF/Plan system	Agreed Mechanism to determine Unmet Need to support Plan	Comments
<b>Tranche 3: Submission anticipated 2026, Projected Adoption 2027/28+</b>	Blaby	Reg 19 Consultation: July 2025	December 2024 NPPF (post transition)	Future SoCG to replace 2022 SoCG based upon new Standard methodology and L&L HENA/capacity evidence	Provisions of 2022 SoCG remain valid until replaced by new SoCG
	Hinckley & Bosworth	Reg 19 Consultation: to be confirmed	December 2024 NPPF (post transition)	Future SoCG to replace 2022 SoCG based upon new Standard methodology and L&L HENA/capacity evidence	Provisions of 2022 SoCG remain valid until replaced by new SoCG
	North- West Leicestershire	Reg 19 Consultation to be confirmed	December 2024 NPPF (post transition)	Future SoCG to replace 2022 SoCG based upon new Standard methodology and L&L HENA/capacity evidence	Provisions of 2022 SoCG remain valid until replaced by new SoCG
	Oadby & Wigston	Consultation on Regulation 19 Plan concluded February 2025	January/February 2025 Reg 19 consultation carried out under Nov 2023 NPPF.  Call for Sites and new capacity assessment work to be undertaken during 2025 to inform new Plan/further Reg 19 under December 2024 NPPF (post transition)	2025 Reg 19 carried out under 2023 NPPF; complies with 2022 SoCG commitments which remain valid until replaced with future SoCG based upon new Standard methodology and HENA/L&L capacity evidence	Provisions of 2022 SoCG remain valid until replaced by new SoCG/new Plan



Tranche	Council	Plan stage/LDS Position	Relevant NPPF/Plan system	Agreed Mechanism to determine Unmet Need to support Plan	Comments
<b>Tranche 4: Future Plans</b>	New Spatial Development Strategy (SDS)	2025 1) Geography Scoping 2) Initial evidence gathering	New Planning system TBC	Strategic Plan will supersede SoCG approach and confirm Strategic Housing distribution	Potential Funding/Pilot Bid to MHCLG?
	Plans delayed or deferred due to LGR/Devolution	Not currently anticipated	New LURA/ P&Inf Bill/Devolution Bill Planning system TBC	In line with future SDS	
	Plans failed to be found sound from Tranches 1-3	Not currently anticipated	New LURA/ P&Inf Bill/Devolution Bill Planning system TBC	In line with future SDS	

#### **4. Agreed Position**

- 4.1 The partners **agree** that for Local Plans progressing and adopted under the 2023 NPPF (Tranche 1 of Table 1 above) and those under the transitional arrangements as set out in Para 234 of Annex 1 of the 2024 NPPF (Tranche 2 of Table 1 above), the scale and distribution provisions for unmet need as set out in the 2022 Statement of Common Ground remain valid and in force.
- 4.2 The partners **agree** that progression of Local plans beyond the Transitional arrangements of the December 2024 NPPF will need to be informed by updated needs and capacity assessments relevant to those plans and the partners commit to working together to accommodate the area's needs once those results are known.

**Leicester & Leicestershire Authorities - Statement of Common Ground  
relating to Housing and Employment Land Needs (June 2022)**

**1.0 The Leicester and Leicestershire HMA and FEMA**

1.1 The Leicester and Leicestershire Housing Market Area (HMA) and Functional Economic Area (FEMA) covers the administrative areas of eight local planning authorities and two transport authorities. The eight local planning authorities responsible for plan making are:

- Blaby District Council
- Charnwood Borough Council
- Harborough District Council
- Hinckley & Bosworth Borough Council
- Leicester City Council (Unitary)
- Melton Borough Council
- North West Leicestershire District Council
- Oadby & Wigston Borough Council

1.2 The two upper tier authorities in Leicester and Leicestershire (L&L), with statutory responsibilities for transportation, education, social care, flooding, minerals & waste planning and public health are:

- Leicester City Council (Unitary)
- Leicestershire County Council

1.3 This Statement has been prepared jointly by the eight plan making authorities and Leicestershire County Council as an additional signatory given their statutory responsibilities, hereafter referred to as “the authorities”. The Map in Appendix D shows the location and administrative areas covered by this statement. The Housing & Economic Needs Assessment 2022 (HENA) identifies this area as the Leicester & Leicestershire HMA and FEMA.

**2.0 Purpose**

2.1 The key strategic matters addressed in this statement are; Duty to Cooperate; L&L Housing and Employment Needs to 2036; Unmet Need to 2036; and the Apportionment of unmet need to 2036. This statement will be reconfirmed and updated as necessary for subsequent authorities’ Local Plans.

**3.0 Key Strategic Matters on which Authorities Agree**

**Duty to Cooperate**

3.1 The authorities agree there is a long track record of effective joint working on strategic matters across L&L. The authorities have continuously engaged with each other on the strategic matters set out in this statement and throughout the preparation of Local Plans across the area. This is most clearly evidenced through:

- The establishment of the Leicester & Leicestershire Members Advisory Group
- The joint preparation of evidence, including the Housing & Economic Needs Assessment (2022), Strategic Growth Options & Constraints Study (2022), and Strategic Transport Assessment (2022).

- The adoption of a non-statutory [Strategic Growth Plan 2018](#) which includes 'notional' housing figures.
- The preparation of a Joint Sustainability Appraisal to consider reasonable alternatives for apportionment of Leicester's unmet need to 2036.
- The agreement of Joint Statements of Cooperation in 2017, 2018, 2020 and 2021 (Appendix E, F, G and H)

3.2 More information and details of engagement will be set out in individual authorities Duty to Cooperate Statements that accompany Local Plans. Authorities will continue to engage on an ongoing basis.

The June 2021 Statement of Common Ground (Appendix H)

3.3 The June 2021 Statement (Appendix H) was agreed by all authorities and included the following:

*"The authorities agree to carry out the following programme of work to inform the apportionment of unmet need from Leicester to the L&L Districts/Boroughs:*

- *Housing and Economic Needs Assessment*
- *Strategic Growth Options and Constraints Mapping*
- *Strategic Transport Assessment*
- *Sustainability Appraisal*

*This work will be commissioned in Spring 2021 and used to inform a Statement of Common Ground apportioning unmet need which is anticipated to be completed in Winter 2021/2022."*

3.4 The Housing & Economic Needs Assessment (HENA) and the Sustainability Appraisal are now complete. These are the key pieces of evidence informing this Statement of Common Ground apportioning Leicester's unmet need to 2036.

3.5 The Strategic Transport Assessment and the Strategic Growth Options & Constraints Mapping take a longer-term perspective that will inform the next steps for the [Strategic Growth Plan](#) to 2050 and will form part of the strategic evidence for Local Plans. This work will be completed later this year.

L&L Housing Need to 2036

3.6 The authorities agree the appropriate way to calculate local housing need is using the current standard method set out in government guidance which currently uses the 2014 based household projections. The authorities agree that local housing need (2020 - 2036) is as follows:

Table 1: Local Housing Need

Local Planning Authority	Total Housing Need 2020 – 2036	Houses per year 2020 - 2036
Blaby District Council	5,456	341
Charnwood Borough Council	17,776*	1,111*
Harborough District Council	8,544	534
Hinckley and Bosworth Borough Council	7,552	472
Leicester City Council	39,424	2,464
Melton Borough Council	3,696	231
North West Leicestershire District Council	5,952	372
Oadby and Wigston Borough Council	3,008	188
Leicester and Leicestershire HMA Total	91,408	5,713

\* In accordance with government guidance Charnwood's Local Housing Need is set using the data from 2021 (including household growth for the 2021-31 and 2020 affordability ratio) as it submitted its Local Plan for Examination in December 2021.

- 3.7 The Government's current standard method for calculating housing need suggests L&L need to provide 91,408 homes (5,713 per year 2020 to 2036).
- 3.8 The NPPF requires authorities to have a clear understanding of the land available in their area to meet housing need through the preparation of a strategic housing land availability assessment (SHLAA). In L&L, the SHLAAs have been prepared using an agreed methodology across the HMA as a whole.
- 3.9 Appendix A and B to this Statement have been prepared using the outputs of the standard method for calculating housing need and SHLAAs. It provides a summary of the need for new homes, and the theoretical capacity of both the HMA and each local authority.
- 3.10 To 2036 there is a theoretical capacity for some 173,721 homes across the HMA as a whole (Appendix B). When set against the need of 91,408 (2020-36), the authorities agree there is flexibility to meet L&L housing need within the HMA, including unmet need.

#### L&L Employment Need to 2036

- 3.11 The authorities agree the appropriate way to calculate employment need is using the jointly prepared Housing and Economic Needs Assessment 2022 (HENA) unless an up-to-date local assessment has been undertaken. Based on the HENA and local assessments of employment land need the authorities agree the need is as follows:

Table 2: Employment Land Needs

	Need		Total	Source
	B1	B2/B8 (small)		
<b>Blaby</b>	9.1	29.0	38.1	2021-36 need, HENA 2022
<b>Charnwood</b>	7.5	35.7	43.2	2021-36 need, HENA 2022
<b>Harborough</b>	6.8	39.3	46.1	2021-36 need, HENA 2022
<b>H&amp;B</b>	4.2	53.4	57.6	2021-36 need, HENA 2022
<b>Leicester</b>	46,100 sqm (2.3 ha)	67.3	69.6	2019-36 need, City EDNA 2020
<b>Melton</b>	2	38.1	40.1	2021-36 need, HENA 2022
<b>NWL</b>	8.9	31.8	40.7	2021-36 need, HENA 2022
<b>O&amp;W</b>	1	3.1	4.1	2021-36 need, HENA 2022
<b>L&amp;L Total</b>	41.8	297.7	339.5	

- 3.12 Table 2 above shows L&L have to provide 340 hectares of employment land to 2036. Appendix C has been prepared using outputs from the HENA and local assessments of employment need, and employment land supply. It provides a summary of the need for new employment land, and the supply of both the FEMA and each local authority. To 2036 there is a supply for some 354 hectares across the FEMA as a whole (Appendix C). When set against the need of 340 (2021-36), the authorities agree there is flexibility to meet L&L Employment Need within the FEMA, including unmet need.

#### Unmet need to 2036

- 3.13 The authorities agree that Leicester City Council is the only authority in the HMA to have declared and quantified (with evidence) an unmet need 2020 to 2036. Assisting Leicester to meet its unmet need is therefore a key element of the Duty to Co-operate across the HMA.
- 3.14 Leicester City Council consulted on a Draft Local Plan (regulation 18) in September to December 2020, with a view to publishing the Submission Version (regulation 19) in 2021. Leicester City declared an unmet housing need in February 2017 (Appendix I) which remained unquantified while further evidence was gathered to support the publication of their Draft Local Plan. During this time several authorities have adopted local plans.
- 3.15 The L&L authorities were made aware of the potential scale of unmet need in December 2019. Consultation on the Leicester Draft Local Plan (and associated evidence) was delayed due to the COVID-19 Pandemic until September to December 2020.
- 3.16 Leicester's Draft Local Plan consultation indicates a potential unmet need of 7,742 homes and 23 Hectares of employment land (B2 General Industrial and B8 Small Warehousing Units less than 9,000 sq.m) 2019 to 2036.
- 3.17 However, immediately after the consultation closed in December 2020 the Government published a new standard method for calculating housing need. The new method increased Leicester's housing need by 35%, adding a further 9,712 homes to their need between 2020 and 2036 (607 homes per year).

- 3.18 Although the supply of homes in Leicester may evolve as their local plan progresses, providing for this amount of additional homes in the City would require more than a doubling of the allocations set out in their recent Draft Local Plan. In this context the City consider that it will not be possible to meet NPPF policy obligations of a sound and deliverable plan, and so in the revised PPG context (Paragraph: 035 Reference ID: 2a-035-20201216) it will be necessary to seek to agree a Statement of Common Ground to deal with the recent increase in housing need.
- 3.19 Leicester's standard method Local Housing Need figure is now 2,464 homes per year generating a need for 39,424 dwellings over the 2020-36 period (see Table 1 above). This includes the 'cities and urban areas uplift' and the 2021 affordability ratios published in March 2022. Appendix A and B, and the June 2021 Statement of Common Ground (Appendix H) was informed by the evidence from the Leicester's Draft Local Plan which sets out the City's capacity to accommodate growth over this period as 20,721 dwellings. An unmet need of 18,700 dwellings is therefore identified based on the evidence at the current time. An unmet need figure of 18,700 dwellings is a reasonable working assumption for the City's unmet housing need to 2036.
- 3.20 The authorities acknowledge that the quantity of Leicester's unmet need may change as the Local Plan progresses (e.g. as evidence on land supply is developed further or the need for homes changes (see section 4.0 below)). The authorities therefore agree a working assumption of Leicester's unmet need of 18,700 homes and 23 Hectares of employment land (2020 – 2036). These figures are subject to testing through the Leicester Local Plan.

Apportionment of Leicester's Unmet Need (2020 – 2036)

- 3.21 The authorities agree the L&L Statement of Common Ground Sustainability Appraisal (2022), the Housing & Economic Needs Assessment (2022) and the associated Housing and Employment Distribution Papers provide the latest cooperatively produced evidence to inform the apportionment of Leicester's unmet needs.
- 3.22 This work is based on the agreed working assumption of an unmet need from Leicester of 18,700 homes. The work considers housing provision across the HMA as a whole having regard to a range of factors including, the functional relationship of each District/Borough with Leicester City, the balance of jobs and homes in each district/borough, and deliverability of the distribution of development. When all of these factors are brought together, they address the unmet need and result in a redistributed housing provision that differs from the standard method starting point. This evidence has informed the following apportionment:

Table 3: Apportionment of Leicester City's Unmet Local Housing Need 2020 to 2036

Local Planning Authority	Average Annual unmet housing need contribution 2020 to 2036 (dwellings)*
Blaby District Council	346
Charnwood Borough Council	78
Harborough District Council	123
Hinckley and Bosworth Borough Council	187
Melton Borough Council	69
North West Leicestershire District Council	314
Oadby and Wigston Borough Council	52
Total	1,169

\*Note: the figures are presented as annual averages 2020-36. This does not imply that an authority's unmet need apportionment must be phased evenly over this period. It will be for each Local Plan to determine appropriate phasing.

- 3.23 The authorities agree that the figures in the Table 3 above represent the agreed apportionment by District/Borough (apart from Hinckley & Bosworth – see Matters Not Agreed in Section 4 below), of the unmet housing need for Leicester, in order to meet the overall objectively assessed need for additional housing within the Leicester and Leicestershire Housing Market Area to 2036. These figures are subject to testing through each individual Local Planning Authority's plan making.
- 3.24 Based on the agreed working assumption of an unmet need from Leicester of 23 hectares of employment land (B2 - General Industrial and B8 - Small Warehousing units less than 9,000sq.m), the joint evidence has informed the following apportionment:

Table 4: Apportionment of Leicester City's Unmet Employment Need 2020 to 2036

Local Planning Authority	Apportionment (Hectares)
Blaby District Council	0
Charnwood Borough Council	23
Harborough District Council	0
Hinckley and Bosworth Borough Council	0
Melton Borough Council	0
North West Leicestershire District Council	0
Oadby and Wigston Borough Council	0
Total	23



- 3.25 The authorities agree that the figures in the Table 4 above represent the agreed apportionment by District/Borough, of the unmet employment need for Leicester, in order to meet the overall objectively assessed need for employment land within the Leicester and Leicestershire FEMA to 2036. These figures are subject to testing through each individual Local Planning Authority's plan making.

#### **4.0 Key Strategic Matters on which Authorities Do Not Agree**

- 4.1 Hinckley & Bosworth Borough Council (HBBC) do not agree to the step in the HENA Housing Distribution Paper (2022) methodology from paragraph 6.21 to 6.24 and the subsequent table 6.9 which apportions 187 dwellings per year of Leicester's unmet housing need. HBBC note the capping of the redistribution of Charnwood's numbers to 1189 and believe that the accommodation of the resulting 187 dpa shortfall should be tested as part of each LPAs Local Plan process, including the current Charnwood Local Plan. HBBC consider that an apportionment of 102 dwellings per year (85 dwellings per year lower than the apportionment in Table 3) to be an initial justified apportionment of Leicester's unmet need for HBBC to test through their Local Plan work and through further strategic work. HBBC disagrees with the methodology from para 6.21 to 6.24 and the subsequent table 6.9 as it is not suitably justified and does not follow the evidence. The use of stock growth is not a measure of deliverability. It does not consider housing need, does not reflect market demand or the deliverability of developing housing in a particular area. The capping of redistribution based on 1.4% stock growth levels is considered to be arbitrary and is not supported by the evidence. Para 6.24 seeks to justify the uplift for HBBC by referencing job opportunities but this has already been considered earlier in the methodology.
- 4.2 HBBC is of the view that the June 2021 SoCG was clear that the apportionment of unmet need would be informed by 4 pieces of work. Only two of these pieces have been completed, the HENA and the SA. Therefore, as reflected in this Statement, the apportionment is a starting point for testing and may be amended based on the completion of the Strategic Growth Options and Constraints mapping work and the Strategic Transport Assessment and the subsequently updated Sustainability Appraisal and the outcome of any local plan 'testing'.
- 4.3 The other authorities do not agree with HBBC and consider the apportionment of 187 dwellings per year in Table 3 is justified by the evidence.

#### **5.0 Maintaining and Updating this Statement**

- 5.1 The authorities acknowledge the Government intend to reform the planning system and have previously consulted on potential future changes, including the Planning for the Future - White Paper (August 2020). The Levelling Up and Regeneration Bill, introduced to Parliament on 11<sup>th</sup> May 2022, proposes a number of reforms to the planning system, including potentially repealing the 'duty to cooperate' contained in existing legislation.
- 5.2 At present these reforms do not impact housing need or emerging Local Plans as they are proposals (rather than legislation) and could be subject to significant change before achieving Royal Assent and becoming law.
- 5.3 Government advice is that authorities should get up-to-date Local Plans in place (Appendix J) and some authorities in L&L are at an advanced stage of plan preparation.

- 5.4 The authorities agree the Duty to Cooperate is an ongoing process, and should the amount of unmet need change significantly, the apportionment of unmet need will be jointly reviewed to assess whether it needs updating. The process for updating and maintaining this statement will be managed through ongoing joint work between the authorities.
- 5.5 The above apportionment (Table 3 and 4 above) is intended to be implemented through individual local plans. These figures will therefore need to be tested through each authority's Local Plan process. The authorities agree that if an authority's local plan process identifies that it is not able to provide for their own objectively assessed needs as well as any unmet need apportioned in this statement (as set out in paragraph 11b of the NPPF), the apportionment of unmet need will need to be jointly reviewed and updated as necessary. The process used for this review will be proportionate to the scale of the issue and should not cause undue delay to the preparation of Local Plans.

## **Appendix A - Leicester and Leicestershire Housing Land Supply, 2020 to 2031**

The table below compares housing land supply to local housing need based on the Governments Standard Method.

	A	B	C	D	E	F	G	H
Authority	Local Housing Need 2020 - 2031	Commitments <sup>1</sup> projected for delivery 2020 to 2031	Allocations in an adopted Plan <sup>2</sup>	Emerging allocations in a draft plan <sup>2</sup>	Allowance for small site or windfall development to 2031	Total Projected Delivery to 2031 (B+C+D+E)	SHLAA Capacity to 2031 <sup>3</sup>	Total Theoretical Capacity to 2031 (F+G)
Blaby	3,751	4,467	758		240	5,465	5,408	10,873
Charnwood	12,221	7,080	1,385	7,894	640	16,999	10,529	27,528
Harborough	5,874	3,693	4,332		864	8,889	5,873	14,762
Hinckley & Bosworth	5,192	2,692	557		584	3,833	15,902	19,735
Leicester City	27,104	9,047		6,602	1,650	17,299	0	17,299
Melton	2,541	2,704	3,145		189	6,038	1,108	7,146
NW Leics	4,092	5,862	790		320	6,972	3,821	10,793
Oadby & Wigston	2,068	1,010	1,203		189	2,402	0	2,402
<b>HMA total</b>	<b>62,843</b>	<b>36,555</b>	<b>12,173</b>	<b>14,496</b>	<b>4,676</b>	<b>67,897</b>	<b>42,041</b>	<b>109,938</b>

<sup>1</sup> Includes sites under construction; with planning permission (including sites with a resolution to grant), as at 31/03/2020

<sup>2</sup> projected delivery up to 31/03/2031; includes allocated sites from local and neighbourhood plans

<sup>3</sup> To avoid duplication SHLAA sites that have planning permission or are allocated in an adopted or emerging plan have been removed from this figure

## **Appendix B - Leicester and Leicestershire Housing Land Supply, 2020 to 2036**

The table below compares housing land supply to local housing need based on the Governments Standard Method.

	<b>A</b>	<b>B</b>	<b>C</b>	<b>D</b>	<b>E</b>	<b>F</b>	<b>G</b>	<b>H</b>
<b>Authority</b>	<b>Local Housing Need 2020 - 2036</b>	<b>Commitments<sup>1</sup> projected for delivery 2020 to 2036</b>	<b>Allocations in an adopted Plan<sup>2</sup></b>	<b>Emerging allocations in a draft plan<sup>2</sup></b>	<b>Allowance for small site or windfall development to 2036</b>	<b>Total Projected Delivery to 2036 (B+C+D+E)</b>	<b>SHLAA Capacity to 2036<sup>3</sup></b>	<b>Total Theoretical Capacity to 2036 (F+G)</b>
<b>Blaby</b>	5,456	4,918	984		440	6,342	18,956	25,298
<b>Charnwood</b>	17,776	8,820	1,990	9,024	1,040	20,874	19,938	40,812
<b>Harborough</b>	8,544	3,693	5,679		864	10,236	9,819	20,055
<b>Hinckley &amp; Bosworth</b>	7,552	2,992	1,497		949	5,438	23,130	28,568
<b>Leicester City</b>	39,424	9,865		8,456	2,400	20,721	0	20,721
<b>Melton</b>	3,696	2,704	3,891		334	6,929	3,635	10,564
<b>NW Leics</b>	5,952	7,013	1,427		520	8,960	13,281	22,241
<b>Oadby &amp; Wigston</b>	3,008	1,010	1,203		189	2,402	3,060	2,402
<b>HMA total</b>	91,408	41,015	16,671	17,480	6,736	81,902	91,819	173,721

<sup>1</sup> Includes sites under construction; with planning permission (including sites with a resolution to grant), as at 31/03/2020

<sup>2</sup> projected delivery up to 31/03/2036; includes allocated sites from local and neighbourhood plans

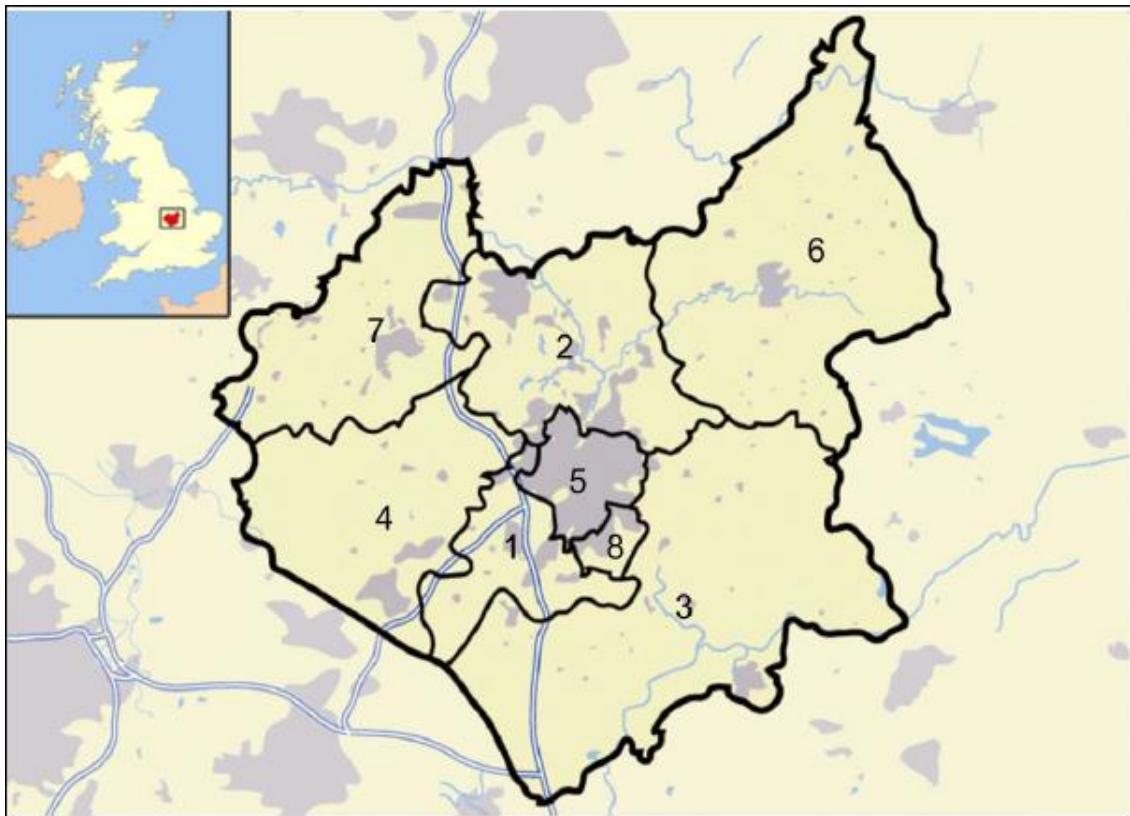
<sup>3</sup> To avoid duplication SHLAA sites that have planning permission or are allocated in an adopted or emerging plan have been removed from this figure

## **Appendix C - Employment Demand and Supply Balance 2021 to 2036 (excluding Strategic Warehousing)**

	Need		Supply		Balance		Notes*
	B1	B2/B8 (small)	B1	B2/B8 (small)	B1	B2/B8 (small)	
<b>Blaby</b>	9.1	29.0	10.5	13.3	1.4	-15.7	2021-36 need, HENA '21 . Supply based on permissions pipeline. Mixed permissions divided by use class. Supply at April 2020
<b>Charnwood</b>	7.5	35.7	15.1	66.7	7.6	31.0	2021-36 need, HENA '21. Supply based on Local Plan trajectory Exc. Loughborough Science and Enterprise Park.
<b>Harborough</b>	6.8	39.3	18.0	41.7	11.2	2.4	2021-36 need, HENA '21 . Supply based on net permissions pipeline at April 2020
<b>H&amp;B</b>	4.2	53.4	4.2	38.9	0.0	-14.5	2021-36 need, HENA '21. Supply based on Local Plan Reg19 Feb '22
<b>Leicester</b>	46,100 sqm (2.3 ha)	67.3	43,000 sqm (2.1 ha)	44.0	-3,100 sqm (-0.2 ha)	-23.3	2019-36 need / office supply, City EDNA '20 (sqm, converted to ha at 2.0 ratio) Industrial supply based on Local Plan Reg19 Feb '22.
<b>Melton</b>	2	38.1	2.6	34.4	0.6	-3.7	2021-36 need, HENA '21 . Supply based on permissions and allocations pipeline. Supply at April 2020
<b>NWL</b>	8.9	31.8	17.1	36.5	8.2	4.7	2021-36 need, HENA '21 . Supply based on permissions and allocations pipeline. Supply at April 2020
<b>O&amp;W</b>	1	3.1	2.8	5.7	1.8	2.6	2021-36 need, HENA '21 . Supply based on permissions and allocations pipeline. Supply at April 2020
<b>L&amp;L Total</b>	41.8	297.7	72.4	281.2	30.6	-16.5	Excludes 50 ha at Loughborough Science and Enterprise Park. Excludes -44,600 sqm offices for Leicester

Source: Various as identified in notes

## Appendix D – Location and Administrative Areas



### Key to Map Two

- |  |   |
|--|---|
| 1. Blaby District Council                | 5. Leicester City Council                     |
| 2. Charnwood Borough Council             | 6. Melton Borough Council                     |
| 3. Harborough District Council           | 7. North West Leicestershire District Council |
| 4. Hinckley and Bosworth Borough Council | 8. Oadby and Wigston Borough Council          |