



**Dinas a Sir Abertawe**

**Hysbysiad o Gyfarfod**

Fe'ch gwahoddir i gyfarfod

## **Panel Perfformiad Craffu - Gwella Gwasanaethau, Adfywio a Chyllid**

**Lleoliad:** Cyfarfod Aml-Leoliad - Ystafell Gloucester, Neuadd y Ddinas / MS Teams

**Dyddiad:** Dydd Mawrth, 16 Ionawr 2024

**Amser:** 10.00 am

**Cynullydd:** Y Cynghorydd Chris Holley OBE

**Aelodaeth:**

Cynghorwyr: P M Black, C M J Evans, E W Fitzgerald, T J Hennegan, P R Hood-Williams, L James, D H Jenkins, M H Jones, M Jones, S M Jones, J W Jones, M W Locke, B J Rowlands, W G Thomas, M S Tribe a/ac T M White

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### **Agenda**

**Rhif y Dudalen.**

- 1 Ymddiheuriadau am absenoldeb**
- 2 Datgeliadau o fuddiannau personol a rhagfarnol**  
[www.abertawe.gov.uk/DatgeliadauBuddiannau](http://www.abertawe.gov.uk/DatgeliadauBuddiannau)
- 3 Gwahardd Pleidleisiau Chwip a Datgan Chwipiau'r Pleidiau**
- 4 Cofnodion** **1 - 3**  
Derbyn nodiadau'r cyfarfod(ydd) blaenorol a chytuno eu bod yn gofnod cywir.
- 5 Cwestiynau gan y Cyhoedd**  
Gellir cyflwyno cwestiynau'n ysgrifenedig i'r adran graffu [craffu@abertawe.gov.uk](mailto:craffu@abertawe.gov.uk) tan ganol dydd ar y diwrnod gwaith cyn y cyfarfod. Cwestiynau ysgrifenedig sy'n cael blaenoriaeth. Gall y cyhoedd ddod i'r cyfarfod a gofyn cwestiynau'n bersonol os oes digon o amser. Mae'n rhaid bod cwestiynau'n berthnasol i eitemau ar ran agored yr agenda a byddwn yn ymdrin â hwy o fewn cyfnod o 10 munud.
- 6 Cynigion y Gyllideb Ddrafft** **4 - 42**

Y Cynghorydd Rob Stewart - Aelod y Cabinet dros yr Economi, Cyllid a

Strategaeth  
Ben Smith – Cyfarwyddwr Cyllid / Swyddog A151

- |           |   |                  |
|-----------|---|------------------|
| <b>7</b>  | <b>Monitro Refeniw a'r Gyllideb Gyfalaf - Chwarter 2 2023/24</b><br>Y Cynghorydd Rob Stewart - Aelod y Cabinet dros yr Economi, Cyllid a Strategaeth<br>Ben Smith – Cyfarwyddwr Cyllid / Swyddog A151                 | <b>43 - 60</b>   |
| <b>8</b>  | <b>Adroddiad Monitro Perfformiad Chwarter 2 2023/24</b><br>Y Cynghorydd David Hopkins - Aelod y Cabinet dros Wasanaethau Corfforaethol a Pherfformiad<br>Richard Rowlands - Rheolwr Cyflwyno Strategol a Pherfformiad | <b>61 - 114</b>  |
| <b>9</b>  | <b>Cynllun Rheoli Cyrchfannau Twristiaeth</b><br>Y Cynghorydd Robert Francis-Davies – Aelod y Cabinet dros Fuddsoddi, Adfywio, Digwyddiadau a Thwristiaeth<br>Steve Hopkins – Rheolwr Twristiaeth a Marchnata         | <b>115 - 156</b> |
| <b>10</b> | <b>Cynllun Gwaith</b>   | <b>157 - 159</b> |

**Cyfarfod nesaf:** Dydd Mawrth, 13 Chwefror 2024 am 10.00 am

*Huw Evans*

**Huw Evans**  
**Pennaeth y Gwasanaethau Democrataidd**  
**Dydd Mawrth, 9 Ionawr 2024**  

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**Cyswllt: Swyddog Craffu - 01792 636292**

# Agenda Item 4



City and County of Swansea

## Minutes of the **Scrutiny Performance Panel - Service Improvement, Regeneration and Finance**

**Multi-Location Meeting - Gloucester Room, Guildhall / MS**

**Teams**

**Tuesday, 12 December 2023 at 10.00 am**

**Present:** Councillor C A Holley (Chair) Presided

**Councillor(s)**

P M Black  
P R Hood-Williams  
M W Locke  
T M White

**Councillor(s)**

C M J Evans  
D H Jenkins  
B J Rowlands

**Councillor(s)**

E W Fitzgerald  
M Jones  
M S Tribe

**Other Attendees**

Cllr Rob Stewart  
Cllr Cyril Anderson

Cabinet Member for Economy Finance and Strategy  
Cabinet Member for Community Services

**Officer(s)**

Ben Smith  
Chris Howell  
Sarah Lackenby  
Rachel Percival

Director of Finance / Section 151 Officer  
Head of Waste Management  
Head of Digital and Customer Services  
Scrutiny Officer

**Apologies for Absence**

Councillor(s): L James, M H Jones, S M Jones, J W Jones and W G Thomas

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**39 Disclosure of Personal and Prejudicial Interests**

In accordance with the provisions of the Code of Conduct adopted by the City and County of Swansea the following interests were declared:

Councillor Chris Holley declared a personal interest in Minute Item 45.

**40 Prohibition of Whipped Votes and Declaration of Party Whips**

None.

**41 Minutes**

Minutes of the previous meeting were agreed.

#### **42 Public Questions**

There were no public questions received.

#### **43 Review of Revenue Reserves**

Cllr Rob Stewart and Ben Smith attended and the report which was presented to Council on 7 December was noted.

#### **44 Mid Term Budget Statement 2023/24 (Verbal)**

Cllr Rob Stewart and Ben Smith attended, and the following was discussed.

- There are budget monitoring pressures in the current year. The 2<sup>nd</sup> Quarter Budget Monitoring report will be presented to Cabinet on 21 December.
- The Welsh Government budget will be announced next week followed by the Local Government settlement.
- The Council continue to lobby Welsh Government through the Welsh Local Government Association.

#### **45 Recycling and Landfill - Annual Performance Monitoring Report**

Cllr Cyril Anderson and Chris Howell shared the report, the following was noted.

- In 2022, the Council adopted a new waste strategy setting out a range of principles and actions to achieve the statutory recycling targets set out in Welsh Government plans by 2024/25.
- In 2022/23 the Council exceeded the current statutory recycling target of 64% by achieving 71.8%. This was an increase of 6.7% on the previous year. This increase was principally due to switching black bag disposal from landfill to energy from waste. Swansea Council is first in the recycling performance league table across Wales.
- Welsh Local Government Association financial benchmarking from 2021/22 showed Swansea Council to have the lowest net expenditure per household-on-household waste services across Wales.
- Welsh Government are considering the introduction of several schemes including a deposit return scheme, workplace recycling legislation and extended producer responsibility.
- Swansea Council are currently trialling reusable containers for cans/glass and paper/cardboard in the St Thomas area which so far has been received positively. If rolled out across Swansea, the cost would be neutral.

#### **46 Audit Wales Report - Digital Strategy Review**

Sarah Lackenby attended to share the Councils response to the Audit Wales report. The following was discussed.

- The report highlights the Audit Wales review of all Council digital strategies across Wales. It looked to seek assurance that digital strategies are delivering well-being objectives in accordance with the Future Generations Act.

- There was one recommendation for improvement which was to bring any review findings to relevant committees. This does normally occur, but normal process was affected by the pandemic.

The digital strategy is reviewed annually, the Panel requested that this review is also brought to scrutiny.

**47 Work Plan**

The work plan was noted.

**48 Letters**

The meeting ended at 11.08 am

**Chair**

# Agenda Item 6



## Report of the Leader and Cabinet Member for Economy, Finance & Strategy

Special Cabinet – 12 January 2024

### Budget Proposals 2024/25 – 2027/28

<b>Purpose:</b>	To consider budget proposals for 2024/25 to 2027/28 as part of the Council's existing Budget Strategy.
<b>Policy Framework:</b>	Medium Term Financial Plan & Budget Strategy
<b>Consultation:</b>	Cabinet Members, Corporate Management Team, Legal, Finance, Access to Services
<b>Recommendation(s):</b>	It is recommended that Cabinet: 1) Approves the Budget proposals summarised in the report and detailed in Appendix B as the basis of consultation 2) Adopts the updated budget future forecast as the starting planning premise for the new medium term financial plan, which will be considered by Council on 7 <sup>th</sup> March 2024. 3) Agrees the approach to consultation and engagement with staff, trade unions, residents, partners and other interested parties set out in Section 7 of the report 4) Receives a report on the outcome of the consultation and final budget proposals at its meeting on 15 <sup>th</sup> February 2024.
<b>Report Authors:</b>	Ben Smith/Sarah Willis
<b>Finance Officer:</b>	Ben Smith
<b>Legal Officer:</b>	Debbie Smith
<b>Access to Services Officer:</b>	Rhian Millar

**This report has been certified by the S151 Officer as urgent in light of the date of the settlement and to enable initial decisions to be taken by Cabinet to proceed with staff, stakeholder and public consultation. It would be prejudicial to the Council's interests to delay the matter and this report will not be subject to call in or pre-decision scrutiny process. The substantive budget decisions will be taken in February by Cabinet and Council in March and the normal call-in procedures and pre-decision scrutiny opportunities will apply then, as appropriate.**

## 1. Introduction

- 1.1. This report updates Cabinet on its budget proposals for budget savings for consultation with residents, community groups and other stakeholders. It has full and due regard to our duties under the Well-being of Future Generations Act 2015.
- 1.2. *Sustainable Swansea – fit for the future* was approved by Council on 22 October 2013 and subsequently reviewed by Cabinet on 16<sup>th</sup> July 2015. Until 2020 it remained the Council's overarching approach to budget and medium-term financial planning, to help deliver the well-being of future generations.
- 1.3. From 2013 to date, the Council, in line with the principles contained within Sustainable Swansea, developed its approach to reviewing services and budget proposals through a series of commissioning reviews, which set out an assessment of individual services, scope for change, alternative delivery models and potential savings and improvements that could be made.
- 1.4. On 15<sup>th</sup> October 2020 Cabinet approved the new "From Recovery to Transformation" report detailing the "Swansea – Achieving Better Together, Transformation Strategy & Programme Framework 2022 – 2026". This outlines a three-phase strategy, the first two phases are now considered complete and a report to Cabinet on 17<sup>th</sup> November 2022 outlined the third, transformation, phase, which will now inform and shape the budget process, ensuring the budget assists the strategic aims and outcomes of the framework.
- 1.5. On 27<sup>th</sup> October 2021, the Chancellor provided a full three-year spending review, which enabled the Welsh Government to give not only a firm settlement for 2022/23, but also indicative figures for 2023/24 and 2024/25. This was helpful and enabled a clear indication of funding to be built into the Medium-Term Financial Plan (MTFP). However, following the global turmoil following the pandemic, the ongoing war in Ukraine and the cost-of-living crisis the outlook has changed considerably since October 2021. Furthermore, the current Chancellor's Autumn Statement on 22<sup>nd</sup> November 2023 gave a bleak outlook for public services funding for 'unprotected' services, and the latest indications are that the Welsh Government will receive a real terms reduction to its block grant for 2024/25 and things can only deteriorate thereafter given the tight real terms spending plans implied. Many respected economic commentators already doubt the pending plans as framed will ever be implemented or delivered in reality. Given the priority usually afforded to the NHS, it was fair to conclude that Local Government would be unlikely to fare any better than the 3.1% originally announced for 2024/25.
- 1.6. The Welsh Government budget and settlement announcements are late again this year, with the provisional settlement announced on 20<sup>th</sup> December 2023 and the final settlement expected early in March. This

makes the budget process extremely challenging, compressed and uncertain to say the least.

1.7. This report covers:

- A reminder of key elements of *Sustainable Swansea* and the new Transformation Strategy & Programme Framework 2022 and Beyond.
- An overview of service and budget priorities for the current and following three years.
- An update on the financial challenge facing the Council.
- The proposed savings programme, including specific proposals for 2024/25 upon which we now need to consult and an indicative for three future years.
- The key risks associated with the current financial position.
- Proposals for engagement and consultation
- Staffing implications
- Delivery and next steps

**2. Background – From *Sustainable Swansea – fit for the future* to the *Successful and Sustainable Swansea Transformation Strategy 2022-2027 and Beyond***

2.1. The scale of the financial, demographic and sustainability challenge required the Council to continue to adopt a radically different approach to previous years. An approach that focused on:

- *The core future purpose of the Council*
- *The transformation of services and the model of delivery*
- *Greater collaboration with other councils and local organisations, community groups and residents*
- *And, above all, sustainable solutions with prevention at its heart*

This ambition was set out in *Sustainable Swansea – fit for the future*, our long-term plan for change, underpinned by our Innovation Programme.

2.2. The Sustainable Swansea Strategy was agreed by Cabinet and reported to Council in October 2013. After a major refresh in 2020, recognising that the strategy so far had successfully delivered the bulk of £70m worth of savings asks, Cabinet approved the new Swansea - Achieving Better Together Transformation Strategy and Programme Framework in October 2020. The new programme built on and strengthened the Sustainable Swansea approach and was in place until November 2022.

2.3. In November 2022 Cabinet approved a new transformation strategy – *Transformation Strategy 2022 and Beyond*. Under the banner of Successful and Sustainable Swansea Corporate Cabinet approved the current transformation programme in April 2023. The original plan contains seven service specific and five cross-cutting programmes and going forward budget savings will be linked to these programmes where they form part of the transformation for those services. This link will be included as part of



the reports to Cabinet and Council in March 2024 recommending the final budget savings proposals for 2024/25.

### 3. Our Service Priorities for 2024/25 and Beyond

- 3.1. Although the Council is currently focused on its plan, as set out in the existing MTFP, to fund pressures of around £90m over the next three years (before any AEF or Council Tax increases), it is vital that we continue to retain Member and management focus on the significant proportion of our budget that will remain. Our gross budget is over £870m (excluding Housing Services (HRA)) and we spend just under £2.1m a day on services to residents (this excludes benefits in kind such as housing benefit and the council tax reduction scheme).
- 3.2. The Council has clear and strong long-term ambitions for Swansea and the proposals for savings must be seen in the context of the following:
  - The Council's top 6 priorities and future plans for services to help deliver the well-being of future generations,
  - The strategic aims of Swansea Council which embrace all that we do
  - The application of budget principles – which guide decision making,
  - The ongoing and sustained real terms reduction in external funding and the need to meet known budget pressures,
  - All set within the context of the aftermath of the COVID-19 pandemic and the subsequent cost of living crisis.
- 3.3. The Council's overall aim is to protect frontline delivery of services as far as possible. However, whilst many things are important, not everything can be a priority. It is important, therefore (particularly in the current climate of significantly reduced resources), that we set out clearly our expectations on all services and relative priorities for funding in the context of the budget reductions that we face.
- 3.4. This requirement is illustrated sharply by the “gearing” effect of savings on services. In other words, if our current funding requirement of £90m (since revised – see below) over three years were applied, for example, just to Place Services, the budget for this area would be completely removed. Consequently, other areas such as Education and Social Care also need to face some relative real terms level of reduction over the next three years, given the relative size of their budgets. Equally, however, if the level of funding for 2024/25 were to be sustained in every future year, then these planning assumptions could be very fundamentally reshaped, and savings asks reduced or possibly even eliminated.
- 3.5. A statement of budget priorities and policy statements that flow from this is set out in **Appendix A**. This statement follows an assessment of services in relation to the following criteria:
  - **Invest:** those Services where the Council will increase current levels of investment
  - **Maintain:** those services where the Council will broadly maintain current level of spend in the medium term

- **Remodel:** those services where the Council will reduce the current level of spend over the medium term

Regardless of relative funding levels, there is an absolute requirement that all services must transform and strive for maximum efficiency.

- 3.6. Following the provisional settlement released by the Welsh Government on 20<sup>th</sup> December, this Council received slightly higher than the indicated 3.1% average, following some anticipated technical re-distribution of funding allocations due to updated data. The uplift for Swansea was announced as £16.002m (3.8%). However, once tax base changes are taken into account the actual cash uplift from 2023/24 is £15.308m (3.7%). Following this uplift then both Education (delegated and non-delegated) and Social Services will be relatively protected and will receive an overall substantial increase in absolute cash budgets for next year. Place Services will also receive a significant increase, although in this case mainly because of baselining corporate landlord energy budgets held centrally in 2023/24. All other services will also receive a cash increase, albeit of a much lower nature and do amount to real terms cuts.
- 3.7. Planning assumptions over future year settlements are heavily dependent upon the national government's overall approach to public spending and the Welsh Government's priorities, both of which substantially add to the risks facing future financial planning assumptions. Crucially the sector demands credible multi-year settlements, which reflect inflation and demand pressures, to plan with some degree of certainty which has simply been lacking. Plans can be made but quickly derailed when there are often wild swings in the actual funding for what amounts to around three quarters of core spending. The outlook remains very challenging beyond 2024/25.

#### **4. Financial Update**

- 4.1. The financial update that follows needs to be in the context of the Medium-Term Financial Plan (MTFP) approved by Council on 2<sup>nd</sup> March 2023.
- 4.2. The indicative savings requirement for the 2024/25 budget and the existing MTFP have been updated and the MTFP extended to include 2027/28. The details are set out in Table 1 below:
- 4.3. It should be emphasised that although there is still a requirement to make targeted savings across all Directorates to live within affordable budget limits, this is in the context of around £135m being invested into services, **meaning that even with savings Directorate budgets will still grow overall by about £80m over 4 years.**

**Table 1 – Indicative Investment and Savings Requirement for  
2024/25 to 2027/28**

	Note	Budget	Medium Term Financial Plan		
		2024/25	2025/26	2026/27	2027/28
		£'000	£'000	£'000	£'000
Future cost of pay awards - LG Staff	1	11,152	17,099	23,211	29,311
- Teachers		8,900	14,900	19,700	24,600
Impact of Teachers' Pay Award	2				
- 2022/23 1.5% Consolidated		1,900	1,900	1,900	1,900
- 2023/24 1.5% above budgeted		1,900	1,900	1,900	1,900
National Living Wage – pay bill	3	1,200	2,400	3,600	4,800
National Living Wage – contracts		3,000	7,400	12,400	17,400
Increase in Pension Costs	4	0	0	1,400	2,800
Increase in Teachers Pension Costs	5	0	0	0	0
Change to Inflation Provision	6	-1,626	2,471	4,982	4,632
Remove use of Reserves to partially fund Energy Prices (short term)	6	9,100	9,100	9,100	9,100
Capital charges – New scheme aspirations	7	0	0	2,000	3,000
Capital Charges – Temporary use of underspend	7	-2,040	0	0	0
Use of Capital Equalisation Reserve	8	-1,350	-350	-350	-5,350
Use of other Reserves	8	-7,029	0	0	0
Rebase ICT Cloud costs	9	500	900	900	900
Demographic & Service pressures	10	3,000	6,000	9,000	12,000
Mid and West Wales Fire Authority Levy ( <b>independently decided by the Fire Authority</b> )	11	1,200	2,200	3,200	4,200
Corporate Joint Committees	11	10	21	32	43
Council Tax Support Scheme	12	1,800	3,300	4,900	6,500
MTFP Service pressures accepted	13	458	852	927	1,002
New service pressures accepted	13	12,083	13,019	13,294	14,839
Contingency	14	-2,555	-2,306	-2,577	-3,024
Temporary One-off Additional Funding for Schools	15	7,029	0	0	0
Social Care extra money for Adult Services as per existing MTFP	16	2,500	5,000	5,000	5,000
<b>Total known pressures</b>		<b>51,132</b>	<b>85,806</b>	<b>114,519</b>	<b>135,553</b>
Savings Requirement	17	-24,924	-42,618	-53,447	-55,798
<b>Net Funding Requirement</b>		<b>26,208</b>	<b>43,188</b>	<b>61,072</b>	<b>79,755</b>

		Budget	Medium Term Financial Plan		
	Note	2024/25	2025/26	2026/27	2027/28
		£'000	£'000	£'000	£'000
Aggregate External Finance increase	18	15,308	24,188	33,272	42,555
Council Tax increase (including tax base changes)	19	10,900	19,000	27,800	37,200
<b>Total Resource Investment</b>		<b>26,208</b>	<b>43,188</b>	<b>61,072</b>	<b>79,755</b>

**Notes:**

1. *The pay award figures represent a forecast increase of 5% for Local Government and Teaching staff in 2024/25, reducing to 2.5% over the life of the MTFP.*
2. *The impact of the 1.5% consolidated pay award agreed nationally for 2022/23 for Teachers, and the Teachers pay award agreed for 2023/24 over and above that provided in the 2023/24 budget.*
3. *Assumed increases due to implementation of National Living Wage - will affect contract prices and lower end of own pay scale.*
4. *The costs arising from the triennial revaluation of the local government pension scheme are included at an assumed 0% per annum until 2025/26. At the next triennial revaluation there is a forecast 1% increase per annum.*
5. *There will be a national 5% increase in Teachers Pension costs from 2024/25. It is expected that the funding for this cost will flow from the UK Government to the Welsh Government as a Barnett consequential and then to Schools post spring 2024. This money will be passported directly to Schools when it arrives. The amount is likely to be £5-6m for Swansea alone and could still arrive as block grant (our previous planning assumption) and added to cash limits or specific grant (shown net). Given the now delayed nature it is assumed for 2024-25 it will come as a specific grant and thus be shown net (zero impact on core) - it remains in the table, unusually, even at zero for now as it will be material sum once quantum and funding mechanism confirmed.*
6. *Energy and other inflationary cost budgets were temporarily increased in 2023/24, funded from reserves, the reserve funding has been replaced and budgets adjusted centrally and in base budgets for services for expected levels of raised cost going forward.*
7. *The additional estimated borrowing costs arising from the new and regional capital programme have been fully provided for, the latest estimates indicate there will be slippage and beneficial short-term one-off gains on the wide difference between our fixed long-term borrowing costs and short-term variable investment rates on cash, enabling a one-off reduction to capital financing charges in 2024/25.*
8. *Cabinet has prudently built-up earmarked reserves to reduce the impact of increased capital charges in respect of new schemes, and targeted use of these reserves is now being built into the budget, along with targeted use of other Earmarked Reserves.*
9. *To rebase permanently some demand led pressures in Corporate Services predominantly around ICT cloud provision.*

10. *Assumed Demographic and Service pressures mainly around Adult and Children's Services.*
  11. *Estimated Fire Authority Levy increase – the final figure won't be known until February when the independent Fire Authority determines its levy requirement. Early indications are that the levy will rise by 9.4% overall, although adjustments to population will mean this varies by authority. Cabinet may wish to note the Standard Spending Assessment funding for Fire services in this authority is £13.639m (2023/24), the actual levy was £17.122m. There is a modest increase included for the Corporate Joint Committee levy of 5% per annum included but the CJC will determine its own levy at the end of January 2024.*
  12. *The assumed cost of Council Tax Support Scheme costs based on Council Tax increases as a planning assumption only at this stage.*
  13. *Individual service pressures accepted.*
  14. *A reduction to the centrally held Contingency Fund based on an assessment of need.*
  15. *A one-off sum of money to increase Schools funding.*
  16. *Following the introduction of the new Social Care Levy additional funding for social care was allocated.*
  17. *The savings requirement of £55.798m shown in Table 1 is indicative of the scale of savings required and will be revised over time.*
  18. *Provisional guideline assumption for 2024/25 and future years, this has been updated from the 3% included in the published MTFP to 3.7% in 2024/25 followed by a 2% increase thereafter. On national spending plans following the Autumn Budget Statement this could easily have been reduced to a more pessimistic zero. 2% is felt to strike the balance between theoretical harshness of plans and the reality to come.*
  19. *Current assumptions on Council Tax and tax base changes, for planning purposes only at this stage.*
- 4.4. Fundamental central assumptions have been made in deriving this table. Most significant is a central assumption that future funding from Welsh Government increases by 3.7% in 2024/25 and 2% thereafter. This is considered by the Section 151 Officer to be a reasonably prudent assumption and has been marginally increased from the assumptions used in the MTFP approved by Council in March 2023.
- 4.5. It is therefore essential that we continue to have visibility of likely future multi-year budget settlements at the earliest possible opportunity to enable us to sensibly plan for the longer term and have due regard to the wellbeing of future generations.
- 4.6. Based on the statement of priorities and having regard to the "gearing effect" when considering savings, the suggested indicative percentage reduction remains as agreed **four years ago** and is set out in Table 2 below for longer term "worst case" planning purposes, which of course may not come to pass at all if annual actual settlements are more generous than the assumptions contained in Table 1 above. Whilst they have indeed been more generous in previous years, given the current economic climate and the

announcements from the Chancellor in the Autumn Statement, it is not expected that settlements will continue to be more generous than assumptions:

**Table 2 – Indicative Targets – Longer-term worst-case scenario**

Service	Percentage Reduction/ Increase over 4 Years at constant prices*	Actual change 23/24 1 year ^
Schools	-15%	+5.9%
Education (excluding Schools)	-15%	+7.9%
Social Care – Child & Families	-15%	+4.1%
Social Care- Adults	-10%	+9.9%
Place	-30%	-16.2%#
Corporate Services	-15%	-12.7%#
Finance (Excluding CTRS)	-15%	+3.0%

*\*Actual budgets will be set based on shares of service pressures, inflationary pressures and investment and specific savings decisions*

*^ The actual change column reflects both budget reductions and pressures for one year only: the planning assumptions for future years reflect only reductions. In practice there are usually as many pressures funded and investment decisions made, as reductions, and so headline budgets move markedly less than the planning assumption would appear to imply.*

*# Those two directorates with reductions had substantial one-off use of reserves the previous year, removal of those one-off budgets causes the reduction.*

- 4.7. This statement will form the basis of our future medium term financial plan, as well as individual service plans. Notwithstanding this broad target savings range, where it is appropriate to do so, and as set out specifically in this report, **additional targeted investment into priority areas will also occur**. This is possible because of the past use of reserves created from the significant increase in funding set out in the Welsh Government's 2021/22, 2022/23 and 2022/23 budget proposals. Whilst this first phase of consultation necessarily focuses on what may need to be reduced and re-prioritised, the main budget proposals in February and March, once the final settlement is confirmed, and initial consultation is concluded, provided the Welsh Government settlement is close to the assumptions made in this report, will show overall substantial net cash investment into all services.
- 4.8. The compounding effect of the key AEF assumption is substantial over the life of the MTFP (the savings ask could be higher, lower, or even fully eliminated) as illustrated below:

**Table 3 – Impact of Welsh Government Funding on future scope for investment into services**

Increase in future year block grant finance assumptions in the MTFP	Reduction (Increase) in gap in one year £'000	Positive (negative) Impact over life of MTFP £'000
0% - possible scenario	0*	(26,500)
3% - possible scenario	(2,800)	10,700
7.6% - continued at 2023/24 headline uplift	16,500	100,556

*In the above table a positive figure indicates sums available to invest into services.*

*\*no change year 1 as the provisional settlement has been announced*

- 4.9. Over recent years the Council has consistently prioritised the **delegated schools' budget**, previously meeting its guaranteed funding requirement over a five-year period. There is now no formal ongoing ministerial protection or funding guarantee, so any decision over schools funding is a local one to be made by Cabinet and ultimately by Council, having due regard to any budget consultation responses received. Education will continue to be the biggest area of funding within the council's revenue budget and will continue to be a key priority for the Council.
- 4.10. With respect to the Current and Future **Capital Programme**, it is clear at the present time that future support from the Welsh Government in respect of general capital grant and supported borrowing on an annual basis is likely to remain significantly curtailed.
- 4.11. The current year allocation in respect of both the supported borrowing and general capital grant elements is £12.882m. The provisional allocation for 2024/25 for Swansea has increased slightly to £12.912m. This allocation is just sufficient to meet the current budgets allocations to cover core commitments as in Table 4 below:

**Table 4 – Capital Allocations for 2024/25 assuming spend maintained**

	£'m
Provisional Welsh Government funding	12.912
Allocation - property and highways maintenance	-7.682
Disabled Facilities Grants & Improvement Grants	-5.200
<b>Available for other schemes</b>	<b>0.030</b>

- 4.12. The remaining capital programme (including improvements to schools) is heavily dependent on future capital receipts and, to that extent, any shortfall in receipts is likely to require an increase in unsupported borrowing to balance the funding for the agreed programme.

- 4.13. Any rise in borrowing has a potentially detrimental effect on future revenue funding, and thus on future generations, and has to be fully planned for.
- 4.14. As such, it is inevitable that the future capital programme will have to be subject to regular review and will be dependent on receipt of specific grant and/or the availability of excess capital receipts.
- 4.15. The original approved five-year capital programme assumed additional unsupported borrowing of some £40m and a longer-term overall envelope of up to £200m. Both were stretched by a further £20m to provide for a capital contingency sum now being utilised. This borrowing has now been effectively fully externalised via use of PWLB loans at historically low rates of interest. The future planning assumption set out in this report includes a further up to £50m of unsupported borrowing, and approximately £20m for the Mumbles CRMP (sea defences) scheme which was supported directly via the settlement from Welsh Government.
- 4.16. In particular, and in direct contrast, further detailed consideration will also have to be given in respect of likely future commitments to, and funding options for, the second phase of the proposed Schools improvement programme, continued investment in the City Centre and the funding requirements that will flow from the Swansea Bay City Region proposals. All of which will benefit not only current, but also future generations. The impacts of new additional unsupported borrowing are reflected in Table 1 above **and includes that further £50m net addition to the overall capital envelope.**
- 4.17. Given the level of overall revenue resources and the scale of the new investment ask over the extended medium term for new capital and the benefits to be felt by future generations the Section 151 officer considered it appropriate to review all the options around changing the Council's Minimum Revenue Provision policy both for past and future investment. Council agreed a report on this on 20<sup>th</sup> December 2018 and the impact of the recommendations is reflected in Table 1 above. This has reduced the revenue costs in the medium term and increases them longer term, but crucially better match the future costs to the future benefits of that investment. This is entirely in line with the principles of the Well-being of Future Generations Act.
- 4.18. Furthermore, it should be noted that appropriate use of the Capital Equalisation Reserve will be recommended for use in determining the final shape of the overall budget in line with the principles agreed by previous Cabinet and Council decisions. This is designed to ensure that any immediate short-term costs of financing Swansea Central Phase 1 are neutralised and thus has no direct impact on other service revenue budgets as more time is taken to adjust to the overall scale of capital spending. This allows a more gradual move towards the longer-term financing costs as fully set out in the medium-term financial plan.



- 4.19. Any capital receipts from the sale of Schools' assets and estates will become part of the Council Capital Budget. It is currently predicted that the schools' capital programme will continue to be funded by the Council.

## **5. Budget Strategy and Proposals**

### **Budget Strategy**

- 5.1. As set out in section 2 above, through *Sustainable Swansea*, then *Swansea – Achieving Better Together*, and now the new *Transformation Strategy 2022 – 2027 and Beyond*, the Council is committed to delivering the most significant change programmes that the council needs to pursue to achieve its vision, namely:

*“In 2028 Swansea is a place that has a thriving mixed use city centre and local economy. It is a place where people can gain the skills and qualifications they need to succeed in life, where everyone can achieve their potential and where communities are resilient and cohesive. Swansea is a place where human rights are respected, and people are safeguarded from harm and exploitation. It is a place where nature and biodiversity are maintained and enhanced, and carbon emissions are falling.”*

The Council has previously embarked on a series of commissioning reviews across all services and the results of a number of those commissioning reviews have been presented to Cabinet and agreed over the past few years.

Whilst no longer called commissioning reviews, the Council nevertheless will continue to review services both as part of the Transformation Strategy and outside of the Strategy and it is anticipated that where outcomes from reviews are presented then consultation and action to implement will be undertaken on a rolling basis outside the normal budget cycle.

- 5.2. The report to Cabinet in March 2023 outlined the governance arrangements for the new Transformation Strategy, in particular highlighting a quarterly progress review by Cabinet and the Corporate Management Team, which will agree any additions to the programme, including those that may be initiated as part of future budget rounds.

### **Budget Proposals**

- 5.3. Budget proposals to meet the current savings requirement for 2024/25 consist of the following elements:
- Funding changes passported through to specific services
  - Service Pressures
  - Service Investment – including substantial additional targeted new cash investment into Social Services and Education in particular
  - Continuation and development of service savings
  - Energy Inflation pressures

- A substantial cash increase in Schools Delegated Budgets to meet cost pressures faced and continue to enhance mainstream capacity within schools.
- Recommendations from the Transformation Board

Each of these categories are addressed below.

***Funding changes in the settlement passport through to services***

- 5.4. It has been the practice in previous years to passport through to services any specific sums provided for in the settlement, where there is clear evidence that this funding has been provided to the Council. This intention remains.

***Service Pressures***

- 5.5. As well as the continuation of funding for specific service pressures that were agreed as part of the 2023/24 budget setting process, additional pressures have been identified in respect of:
- Various corporate pressures following implementation of new structures, strategies, plans and audit requirements
  - Social Services additional pressures mainly around inflationary cost of placements
  - Education core staffing pressures
  - Inflationary Home to School Transport pressures.

***Service Investment***

- 5.6. Material service investment requirements have been identified in respect of:
- Education service pressures, particularly in respect of the implications of the Additional Learning Needs Act.
  - Social Care additional money for Adult Services
  - Local priorities and choices

***Continuation and Development of Service Savings***

- 5.7. Service savings requirements have been identified in respect of 2024/25 resulting in the summarised position as set out in Table 5 below. The detailed list of savings is set out in Appendix B:

**Table 5 – Review of Planned Savings 2024/25**

	<b>Proposed savings 2024/25 £'000</b>
Place	1,956
Social Services (including Poverty & Prevention)	6,045
Education (excluding Schools)*	2,189
Corporate Services	897
Finance (Including CTRS)	1,630
<b>Sub-total (per Appendix B)</b>	<b>12,717</b>
Schools*	12,207
<b>Total</b>	<b>24,924</b>

\*Schools savings and pressures fall entirely to the delegated budgets and are shown separately as these are decisions for schools to take

5.8. These proposals can be alternatively summarised in Table 6 as follows:

**Table 6 – Budget Proposals 2024/25**

	<b>Savings</b>	<b>2024/25£'000</b>
<i>Savings type</i>	Workforce	2,640
	Other spending	5,688
	Income	2,346
	Mixed	2,043
	<b>Savings Total as per Appendix B</b>	<b>12,717</b>

5.9. Savings proposals are a combination of those following on from last year's proposals and new proposals. All proposals have been reviewed as part of the budget setting process and only those deemed capable of being delivered have remained for consideration.

5.10. For delivery purposes, all proposals that are approved, after considering the outcome of consultation and Integrated Impact Assessments, will be combined into a single delivery tracker with progress updated monthly by the Head of Service accountable for delivery. Those forming part of the Transformation Programme will also be monitored as part of the progress reviews of the Plan.

### ***Energy Inflation Pressures***

- 5.11. Due to the unprecedented levels of energy price inflation, it was deemed necessary to create a fund that can be utilised by internal departments, schools and strategic partners to help alleviate the short-term pressure of price inflation during 2023/24. This fund is on track to be fully utilised during 2023/24 and although energy prices are expected to reduce in the longer term it is clear that increased budgets will still be needed. As such, £4.5m will be transferred to the Place base budget from 2024/25 and £4.5m will be made available to Schools for 2024/25 only.

### ***Schools' Delegated Budgets***

- 5.12. The indicative savings assessments set out in Table 2 at 4.6 above and Appendix A, show that it is inevitable, given the scale of reductions required within the one education budget, that ongoing consideration will have to be given to the longer-term level of schools' delegated budgets. However, Schools remain a priority and as such there will still be clear prioritised investment, meaning an overall cash increase to the money available to Schools for 2024/25 but set against real terms pressures and thus a major savings contribution is also required. Teacher employers' pensions cost will be increased from 1 April 2024 by 5% and a corresponding grant is expected via UK and Welsh Government to fully compensate, but this detail has been deferred until Spring 2024 by the UK Government's Autumn Budget Statement. It is explicitly assumed, given the lateness of the detail announcement to come, it will be an additional specific grant in year one (2024-25) and then roll into core funding from 2025-26. It is currently excluded from both spending and funding to ensure net nil impact, until clarified.

- 5.13. Budget movements can be viewed in two ways:
- Actual cash increases in levels of funding provided to Schools
  - Real terms changes in Schools funding, taking into account known spending needs, as previously advised and shared with the Schools Budget Forum.

- 5.14. For current consultation purposes, it is intended that there will be a proposed 6.3% (£11.938m) cash increase in headline schools funding (which includes Pupil Deprivation Grant and Post 16 funding, which come separately from Welsh Government).

Whilst every effort has been made to ensure Schools budgets are protected, it is inevitable, given the current levels of inflation faced by the entire Country, that Schools will also have to face some element of savings to ensure they stay within budget. This is clear from the budget pressures set out in Table 7 below that fall directly to the delegated schools' budget.

- 5.15. There are other budget pressures detailed in Table 1 in Section 4.3 that will fall directly to the non-delegated budget, even though these relate to

externally driven and demand led areas of statutory provision for pupils (such as additional learning needs (ALN) and home to school transport).

**Table 7 – Main Pressures on Schools Delegated Budgets**

<b>Identified budget pressure in schools</b>	<b>2024/25</b>
	<b>£'000</b>
Schools pay award	8,900
Impact of the 2022/23 consolidated pay award	1,900
Impact of the 2023/24 pay award	1,900
Reduced Budget Delegation (previously agreed)	-84
<b>Total Delegated Pressures</b>	<b>12,616</b>

<b>Change from Council budget as proposed</b>	<b>2023/24</b>
	<b>£'000</b>
Additional funding for pressures and continued investment in schools (as above)	12,616
One-off investment for 2024/25 only*	7,029
Energy Price Inflation (available to Schools)**	4,500
Net savings required from schools	-12,207
<b>Total net budget increase proposed - schools</b>	<b>11,938</b>
Anticipated pension funding (TBC)	5,000
<b>Schools current anticipated funding offer</b>	<b>16,938</b>

*The schools delegated budget includes Pupil Deprivation Grant (PDG) and Post 16 grant. We await final clarification on these including the rationalisation of some grants including PDG into a smaller subset of 4 renamed/refocussed Local Authority Education Grants (LAEG)*

*\* this one-off investment is being funded from reserves for one year only to provide short-term help for Schools*

*\*\* see paragraph 5.11 above, the Energy allocation will be ring-fenced and held centrally by Education, not immediately delegated to Schools*

- 5.16. Education will continue to be biggest area of funding within the council's revenue budget and will continue to be a key priority for the council. Cabinet will have to consider what actual overall funding is proposed in respect of the schools delegated budget following consultation with all head-teachers, which started with a meeting with the Leader on 21<sup>st</sup> December 2023. This will be presented back to Cabinet as part of the overall consultation report.

For the past few years, there has been no ministerial funding guarantee for schools explicit in the provisional revenue settlements. It is expected that this will continue, so supporting schools to the level suggested in this report

is a local choice, reflecting the priority Cabinet and indeed Council awards to Education.

Recognising previous policy commitments, it is also intended that any other specific cash increase for schools in the final settlement, once confirmed, will be passported through as targeted additional investment in schools delegated budgets. There is an additional cost expected in relation to Teacher’s Pension cost increases, and when this funding is devolved to the Welsh Government and then consequentially passed to Councils this will be passported, but this is not expected to happen until Spring 2024 at the earliest.

It is recognised that even with that potential level of investment, schools, like all services, face significant real pressures in the medium to longer term, when the costs of the COVID-19 response nationally will need to be repaid.

**Summary of Proposals**

5.17. The total proposals across the areas outlined above are shown in Table 8 below:

**Table 8 – Proposals for 2024/25**

<b>Proposals</b>	<b>£’000</b>
Service Savings (as per Appendix B)	12,717
Schools' savings	12,207
Council tax income (Including assumptions on tax base)	10,900
Aggregate External Finance increase (including CRMP)	15,308
Council pressures	-51,132
<b>Net Pressures less Funding</b>	<b>0</b>

5.18. The detailed proposals are set out in **Appendix B**. Subject to Cabinet approval, consultation will commence on the proposals, as appropriate, with staff, Trade Unions, Schools’ Budget Forum, residents, affected groups and partners, alongside Integrated Impact Assessments (IIAs).

5.19. The current total of all savings proposals for 2024/25 is £24.924m, against the current total requirement of £51.132m (including Schools pressures). The current assumption is that the gap will be funded by an overall increase in Council Tax yield (which includes an increase in tax base) of £10.900m and Aggregate External Finance increase of £15.308m. Work will continue over the next month up to Cabinet in February 2024 to assess a range of options. This is necessary because:

- Some proposals may not be approved following the outcome of consultation and Integrated Impact Assessments

- Additional savings are required as a contingency against non-delivery of some savings in year
- Some services may need additional investment, which will be decided following consultation.
- Final Council Tax levels may be lower (or higher) than the assumptions in this report.

5.20. This assessment will include a review of other service savings and our policy on Council Tax. It should be noted that the Welsh Government has made an assumption of Council Tax increases of 6.8% in its standard spending assessment calculations.

## 6. Assessment of Risks and Uncertainties

6.1. As in previous years, the budget proposals as presented must be viewed in the context of the ongoing risks and uncertainties that the Council faces during 2024/25 and beyond:

6.2. These currently include:

- Equal pay claims:** following widescale reporting of financial pressures especially in England, in line with all other councils, equal pay claims and potential liabilities are being rapidly reviewed.
- Pay and grading appeals:** It is assumed, as in previous years, that costs arising out of pay and grading appeals will be met from within Directorate approved budgets and schools delegated budgets where appropriate.
- Specific grants:** It is possible that, based on previous experience, the Council could suffer from a reduction in specific grants received from Welsh Government and other public bodies. It remains the case that where grant reductions do occur, they will require specific service cost reductions in addition to any savings targets identified above. It is increasingly likely that many grants will be either stay the same in cash or even reduce for 2024/25, which in both cases are clearly real term cuts. It should be noted that the grants announced to date will remain cash flat at best or reduce for 2024/25, causing further pressure on services.
- The savings proposals** for 2024/25 and beyond are predicated on clear and decisive action being taken to deliver wide-scale transformational change longer term. This will require robust implementation, monitoring, review and, if necessary, enforcement of savings proposals.
- The timing** of Welsh Government announcements on the detail of both core and specific grants means that uncertainty will remain until after the final period of the budget setting process.
- Ongoing forecast service overspending** in 2023/24, which may or may not continue into 2024/25. Although services are now operating

business as usual following COVID-19 there are on-going impacts for example where income levels have not yet recovered.

- g) **General Reserves** remain at the lowest advisable level as advised by the Council's 151 officer and are not therefore able to meet any large current or future service overspends.
- h) **Costs of staffing reductions** could continue to be significant. There remains a small restructure reserve, which might assist with departure costs. Once this is exhausted all future departure costs will fall to individual service revenue accounts, including education, for schools' departures.
- i) **Overspending risks in 2024/25** are material because future savings are considered to be equally challenging to both agree and deliver, as savings continue to need to be made, and require ever more difficult decisions and more wide scale transformational change.
- j) **Future Year Settlements** - there has been some indication from the Welsh Government on future year settlements pan Wales envelopes – and it is clear there is a significant risk that the likely modest and much lower increase for 2024/25 may not even be capable of being sustained in future settlements.
- k) **COVID-19** – whilst the pandemic is over and the Council is operating business as usual there are on-going impacts for example where income levels have not yet recovered.

## 7. Consultation and Engagement

7.1. In previous years the Council has consulted on a number of issues including:

- Specific budget proposals relating to budget reductions impacting on the following year's revenue and capital budget together with potential longer-term savings to deliver the MTFP.
- Consultation on shaping the Council's Wellbeing Objectives, as set out in the existing Corporate Plan 2023-28.

7.2. In terms of Council priorities, consultation has been taken into account in deciding the new key priorities (Well-being Objectives and Improvement Objectives) which are as follows:

- **Safeguarding** people from harm – so that our citizens are free from harm and exploitation.
- Improving **Education and Skills** - so that everyone in Swansea gains the skills and qualifications they need to succeed in life.
- Transforming our **Economy and Infrastructure** – so that Swansea has a thriving mixed-use City Centre and a local economy that will support the prosperity of our citizens.
- **Tackling Poverty** – so that every person in Swansea can achieve their potential.



- Maintaining and enhancing Swansea's **Natural Resources and Biodiversity** – so that we maintain and enhance biodiversity, reduce our carbon footprint, improve our knowledge and understanding of our natural environment and benefit health and well-being.
  - **Transformation and Future Council** development – so that we and the services we provide are sustainable and fit for the future.
- 7.3. In terms of the current consultation, it is not intended that we repeat the consultation exercise on overarching Council priorities at this time. Likewise, we will not consult again on matters that are merely a continuation of existing good practice, or previously agreed plans, such as our continued successful implementation of the Safe Looked After Children reduction strategy, or where there is more detailed consultation, following the findings of our commissioning reviews.
- 7.4. However, as in previous years, the Council will undertake a full consultation on proposals that will affect the public in general or specific sections of the Community.
- 7.5. It is essential that in agreeing to consult we consider the following:
- Under the Public Sector Equality Duty (Wales) we have to engage with protected groups to assess the likely impact of any policies or practices being proposed or reviewed.
  - The Wales National Principles for Public Engagement include the expectation that engagement gives a real chance to influence policy, service design and delivery from an early stage.
  - Under the Gunning principles, consultation should be at an early stage with public bodies having an open mind, those being consulted have enough information to make an intelligent choice, enough time is provided for people to make an informed choice and consultation responses must be taken into account by those making the decision as to budget.
  - The requirements and principles embedded in the Well-being of Future Generations (Wales) Act, which underpin everything that the Council does.
- 7.6. Details of the settlement dates from Welsh Government detailed elsewhere in this report highlight the extremely difficult timetable the Council faces in setting its budget proposals.
- 7.7. In terms of consultation, the Council intends to fulfil its obligations by:
- Undertaking a **Public Survey**. Specific budget proposals and those relating to the Commissioning Reviews will be included in the public survey that will be available online.
  - **Consultation with groups**. We will promote the survey to a number of Groups including children and young people, groups with protected characteristics and organisations such as Community Councils.
  - **Staff engagement**. The survey will be promoted to staff.

- **Unions.** The Leader, Cabinet Members and Officers are due to meet Union representatives to discuss the proposals.
  - **Schools.** Officers and Members will consult headteachers on proposals that affect schools.
  - **Promoting** and communicating the consultation via website and social media.
- 7.8. There will be on-going consultation during the forthcoming year as and when the individual transformation programmes progress and develop their proposals for transforming services and helping to deliver contributions towards the overall savings requirement.

## 8. Staffing Implications

8.1. The Council, working in partnership with Trade Unions, succeeded in largely avoiding compulsory redundancies as part of the implementation of the budget savings for 2023/24. This was achieved by a continued flexible policy on redeployment and a proactive approach by all parties. The clear intention is to build on this approach for 2024/25 and to look for other ways of avoiding compulsory redundancies if at all possible.

8.2. However, a reduction in posts in 2024/25 will be unavoidable, given that around 45% of the Council's overall costs relate to employees (significantly more in some Service Areas).

8.3. Notwithstanding the scale of the challenge, in line with the Council's current policy, every effort will be made to minimise compulsory redundancies. Management action includes:

- *Tight management of vacancies so that we manage the deletion of posts via natural wastage over time,*
- *The use of fixed term appointments where cover is necessary,*
- *Stopping the use of agency staff without a clear business case,*
- *Redeployment and retraining wherever possible,*
- *Further encouragement of staff to consider ER/VR options in areas where staffing reductions are unavoidable,*
- *Encouraging staff to work flexibly e.g.: reduce hours or job share,*
- *Flexible retirement.*

8.4. The groups of staff likely to be most at risk (no options can be ruled out at this stage) are those affected by service savings, those in management/supervisory posts, those employed in business support functions.

Those employed in schools are also considered to be at risk but staffing decisions are a matter for individual school governing bodies to determine.

The latest indicative estimate of the impact of the current proposals on total staffing numbers for 2024/25 is set out in Table 9 (shown as Full Time Equivalent (FTEs)).

**Table 9 – Impact of Savings Proposals on FTEs 2024/25**

		<b>FTEs</b>
<b>Service Saving Proposals</b>		
	Corporate Services	8
	Finance	3
	Place	5
	Education (excluding Schools)	6
	Social Services	6
	<b>Total</b>	<b>28</b>

As set out in 8.3 above these are **not** all posts automatically directly at risk of compulsory redundancy – **all** possible mitigations will be taken first.

		<b>FTEs</b>
<b>Indicative schools figure *</b>		
	Schools	TBC
	<b>Total</b>	<b>0</b>

**\* Decisions will be taken by individual school bodies.**

- 8.5. The Council will need to consult with Trade Unions about the 2024/25 savings proposals and the likely impact on staff; in particular, the management of change and selection criteria where posts are at risk of redundancy. It is a legal requirement and incumbent upon the Council to commence formal negotiations with the Trade Unions to seek to avoid the need for such redundancies, to consider alternatives and to seek to reach agreement on the selection process for redundancies, should we get to that position. This is in line with the requirements of Section 188 (1) of the Trade Union and Labour Relations (Consolidation) Act 1992 (as amended). This is on the basis that these proposals will potentially affect less than 99 employees (excluding schools) and that the period of consultation will be for a minimum of 30 days.
- 8.6. The Council is committed to continue to work closely with Trade Unions to minimise the number of compulsory redundancies, as it always is. This year especially, however, noting the relatively small scale of numbers of overall posts still remaining at some risk and the potential in the settlement headroom to consider significant investment into services before the budget proposals are finalised, the scope for new redeployment opportunities and absolute minimisation of the final risk to any individual role is greatly enhanced.
- 8.7. Reflecting the principle in the MTFP stated earlier in this report, consultation will be undertaken on a rolling basis outside the normal budget cycle, as the outcomes from reviews are presented to Cabinet. Consequently, in some Service Areas, it is not possible at this time to give details of the precise impact on staff and the figures quoted are, therefore, overall estimates. The regular liaison meetings with Trade Unions will be used to provide more detail when this becomes available as future options are agreed.

8.8. It should be noted that in addition to the impact that proposed savings may have on FTE's, should grant funding remain at the same level, or reduce in 2024/25 then there could be further posts at risk. These posts would be subject to the same mitigations as listed in 8.3 above. The number of posts potentially affected is unknown until the levels of specific grant are announced, and grant offers made.

**9. Delivery – “Decide and Do”**

9.1. Delivery of the Budget Strategy and Savings Programme is clearly critical. If this is not given the right attention savings will not be achieved. This requires a clear understanding of the organisational requirements to deliver.

***Deliverability of Savings***

9.2. In parallel with the consultation process, we are undertaking a robust appraisal of all options for savings to ensure:

- They are deliverable,
- We understand the impact,
- We have assessed the risks and how these can be mitigated.

Subject to the above, we will adopt the principle of “decide and do” in terms of a pragmatic approach to the implementation of proposals.

9.3. The Corporate Management Team has oversight of the programme management arrangements for the Savings Programme. This includes a sponsorship role for Directors, supported by a wide range of Heads of Service and Senior Managers from every part of the Council and project support.

***Timeline***

9.4. The remaining timeline for the Budget process is set out in Table 10 below. This timetable is effectively being driven by the dates set for the provisional and final settlements

**Table 10 – Budget Timetable**

21 <sup>st</sup> December 2023	Initial Schools consultation starts	Annual meeting with Headteachers was on 21 <sup>st</sup> December. School Budget Forum met on 10 <sup>th</sup> January 2024 (proposals)
12 <sup>th</sup> January 2024	Consultation commences	A variety of means will be used including specific consultation with staff, trade unions, young people, taxpayers and the public
16 <sup>th</sup> January 2024	<b>Scrutiny</b>	Review of this initial Cabinet report – this report having been issued

		under urgency provisions given lateness of settlement.
11 <sup>th</sup> February 2024	Consultation closes	Headline report will be produced on initial consultation responses
13 February 2024	<b>Scrutiny</b>	Review of Cabinet proposals
15 <sup>th</sup> February 2024	<b>Cabinet</b>	Reviews initial consultation feedback and recommends Budget
7 <sup>th</sup> March 2024	<b>Council</b>	Reviews final consultation feedback, approves Budget and sets Council Tax

## 10. Next Steps – Transformation Goals and Strategy

10.1. As stated above, the scale of the financial challenge requires the Council to continue to adopt a radically different approach to previous years. An approach that focuses on:

- *The core purpose of the Council*
- *Transforming services to be effective and efficient*
- *Greater collaboration with other Councils, organisations, community groups and residents, with a focus on regionalisation*
- *Balancing the budget for current and future years*
- *Greater and more meaningful engagements with our residents and community*
- *To meet the aspirations and targets within the Medium-Term Financial Plan.*

This ambition is set out in Swansea’s Transformation Goals and Strategy approved by Council in November 2022.

10.2. Uncertainty of future funding means a range of spending options need to be considered including risks of substantial real terms cuts but equally opportunities for real terms increase if overall public spending is materially increased. Spending decisions cannot take place without a fundamental review of the future purpose and shape of the Council to 2025 and beyond. This is particularly important because:

- The Council has clear aspirations and policy commitments to improve outcomes for residents that will need to be delivered alongside savings,
- We will also need to consider the requirement for further investment in prevention in social care to remodel the projected future demand for services,
- This requires a debate about innovation, service transformation, and doing things differently,
- And we must collaborate with others to achieve this,
- All this must be considered alongside the ambitious Capital Development programme with known increases in associated future borrowing costs,
- To ultimately deliver the well-being of future generations.

10.3. Consequently, the current debate with residents and partners, as well as inside the Council, about the Core Purpose of the Council, what residents and communities can do for themselves, and the Future Shape of the Council is fundamental. This will be further considered in the next corporate plan due to be consulted on early in 2024.

## **11. Integrated Assessment Implications**

11.1. The Council is subject to the Equality Act (Public Sector Equality Duty and the socio-economic duty), the Well-being of Future Generations (Wales) Act 2015 and the Welsh Language (Wales) Measure, and must in the exercise of their functions, have due regard to the need to:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Act.
- Advance equality of opportunity between people who share a protected characteristic and those who do not.
- Foster good relations between people who share a protected characteristic and those who do not.
- Deliver better outcomes for those people who experience socio-economic disadvantage.
- Consider opportunities for people to use the Welsh language.
- Treat the Welsh language no less favourably than English. Ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs.

11.2. The Well-being of Future Generations (Wales) Act 2015 mandates that public bodies in Wales must carry out sustainable development. Sustainable development means the process of improving the economic, social, environmental, and cultural well-being of Wales by taking action, in accordance with the sustainable development principle, aimed at achieving the “well-being goals”.

11.3. Our Integrated Impact Assessment (IIA) process ensures we have paid due regard to the above. It also takes into account other key issues and priorities, such as poverty and social exclusion, community cohesion, carers, the United Nations Convention on the Rights of the Child (UNCRC) and Welsh language.

11.4. As indicated in the IIA screening (Appendix C), the IIA process has begun and all proposals will carry out their individual assessment. Initial impacts identified have been used to inform the proposals within this report. Cabinet and Council will receive a full report on the feedback from the consultation and outcomes of the IIA process in February and March 2024 so that they can be fully taken into account before any decisions are made.

11.5. There will also be full engagement with the Council’s Scrutiny Committee.

## **12. Financial Implications**

- 12.1. This report sets out the Council's projected budget position for 2024/25 and sets out proposals to meet the projected pressures currently estimated at £51.132m.
- 12.2. It is a legal requirement that Council sets a balanced Revenue Budget for each financial year, and it is essential that detailed plans to address projected shortfalls are developed and, more importantly, delivered over the coming years.
- 12.3. Progress with achieving savings agreed as part of the 2023/24 budget is monitored each month by the Corporate Management Team (CMT), with quarterly reports to Cabinet. Those savings that are linked to the Transformation Programme are also reported to the Transformation Delivery Board, with quarterly progress monitored by Cabinet and CMT.

## **13. Legal Implications**

- 13.1. Specific legal duties relating to consultation and the setting of the budget are set out in the main body of the report. The Council is under a duty to set a balanced budget by 11<sup>th</sup> March 2024.
- 13.2. Any budget consultation must be meaningful and be taken into consideration when making any decision.
- 13.3. The council has a public sector equality duty under the Equality Act 2010. In order to comply with that duty it is essential that Equality Impact Assessments are undertaken where appropriate in relation to budget proposals and any impact is considered.

**Background Papers:** None

### **Appendices:**

Appendix A – Statement of Medium-Term Budget Priorities

Appendix B – Savings Proposals 2024/25

Appendix C – IIA Screening

## STATEMENT OF MEDIUM-TERM BUDGET PRIORITIES

### PURPOSE

This paper sets out the Council's views on relative service and budget priorities in the context of the delivery of Swansea's *Transformation Strategy 2022 and Beyond* and the Medium-Term Financial Plan.

The statement has three objectives:

- *An indicative statement about future funding for services, together with an overall percentage reduction in spend over the next 4 years*
- *A high-level statement for services about expectations for transformation and delivery*
- *Policy statements for each major service block setting out how the funding challenge will be met*

### STRATEGIC CONTEXT

The scale of the financial, demographic and sustainability challenges facing Swansea require a radically different approach to the past, and the corporate transformation plan, developed under the banner of the Council's Corporate Plan "Successful and Sustainable Swansea", focusses on achieving the Council's vision.

The Corporate Plan sets out six top well-being priorities for the future:

- *Safeguarding people from harm*
- *Improving Education & Skills*
- *Transforming our Economy & Infrastructure*
- *Tackling Poverty*
- *Maintaining and enhancing Swansea's Natural Resources and Biodiversity*
- *Transformation & Future Council development*

The Council's overall aim is to protect frontline delivery of services as far as possible. However, whilst many things are important, not everything can be a priority. It is important, therefore - particularly in the current climate of significantly reduced resources – to set out clearly our expectations on all services and relative priorities for funding.



## FINANCIAL CONTEXT

We currently estimate that the Council will face pressures of around £135m over the next 4 years, on the central scenario of future grant increases (worth £43m) dropping from 3.7% to 2% by 2027/28. The actual amount could vary significantly given the uncertainty over future funding indications from the UK and Welsh Governments. This requires not only a strategy for transformation, but also a clear statement of the expected impact across the Council's major services.

## SETTING INDICATIVE MEDIUM TERM FINANCIAL ALLOCATIONS

The Council is proposing indicative medium-term financial allocations following an assessment of our overall priorities and the financial context that we face.

The statement which follows is based on an assessment of services in relation to the following criteria:

- **Invest:** those Services where the Council will increase current levels of investment in order to:
  - Deliver our top priorities; and/or
  - Achieve significant reductions in future spend.
- **Maintain:** those services where the Council will broadly maintain current level of spend in the medium term to:
  - Deliver our top priorities,
  - Meet statutory requirements,
  - Meet resident expectations.
- **Remodel:** those services where the Council will remodel the current level of spend over the medium term:
  - Because these are lower priority areas
  - To contribute to the overall budget savings requirement

In setting financial allocations, we have also had regard to the “gearing” effect of savings on services. In other words, if our current net funding requirement of £92m (after block grant increase) over four years was applied, for example, just to Corporate Services and the Place Directorate, the budgets for these areas would be cut in their entirety. Consequently, other areas such as Education and Social Care also need to face some level of reprioritisation over the next 4 years given the relative size of their budgets.

## GENERAL PRINCIPLES FOR ALL SERVICES

There are a number of principles that apply to all the Council's services, regardless of the assessment of relative priorities. These are set out below.

### Budget Principles

The Council has adopted a number of Budget Principles that underpinned *Sustainable Swansea*, and remain extant:

<i>Everything is included</i>	<i>Increased income</i>
<i>Engagement</i>	<i>Different models of delivery</i>
<i>We will have less money</i>	<i>Supporting those at risk</i>
<i>Demonstrating efficiency</i>	<i>Evidence base</i>
<i>Cutting Red Tape</i>	<i>Sustainable outcomes/prevention</i>
<i>Full cost recovery</i>	<i>Personal Responsibility</i>

All Services must apply and be consistent with these Budget Principles.

All Services are also required to address these Principles as part of business planning and developing savings proposals.

### **Service Transformation and Efficiency**

There are expectations upon all Services in relation to transformation and efficiency, which must be met regardless of relative priority for funding:

<b>Transformation</b>	<p>All service must transform through a fundamental review of purpose, however services are commissioned, to:</p> <ul style="list-style-type: none"> <li>• deliver better outcomes</li> <li>• develop a sustainable delivery model, fit for the future</li> <li>• remodel costs and secure value for money</li> </ul>
<b>Efficiency</b>	<p>All services must continue to strive for efficiency, in particular:</p> <ul style="list-style-type: none"> <li>• reduce management and other overheads</li> <li>• maximise opportunities for increasing income from charges, trading and external sources</li> <li>• reduce the cost of purchasing supplies and services</li> <li>• work with others to achieve better outcomes</li> <li>• look for opportunities for residents or community groups to take or share responsibility for services</li> </ul>

**APPENDIX B**

<b>Director</b>	<b>Head of Service Budget</b>	<b>Description</b>	<b>Savings 2024/25 £'000</b>
Corporate Services	Communications Service	Restructure corporate marketing	62
Corporate Services	Communications Service	Standardise official driver employment terms	17
Corporate Services	Communications Service	Restructure corporate support services (Delete 0.5 vacant post)	22
Corporate Services	Communications Service	Restructure corporate support services (Delivery Unit))	60
Corporate Services	Communications Service	Restructure corporate support services (Policy & Development Support)	62
Corporate Services	Digital and Customer Services	Contracts saving	290
Corporate Services	Digital and Customer Services	Licences saving	33
Corporate Services	Digital and Customer Services	Mobile Phone saving	16
Corporate Services	Digital and Customer Services	No renewal of RecordPoint Licences Contract	48
Corporate Services	Digital and Customer Services	Restructure digital project management team	55
Corporate Services	Digital and Customer Services	Remove surplus training budget	15
Corporate Services	Director	Non-staff spend savings (different ways of working)	39
Corporate Services	Director	Reduce expenditure on senior management as part of review	45
Corporate Services	HR & Service Centre	Pay inflation increase to Schools WOD (human Resources) SLA	25
Corporate Services	Legal Democratic Services & Business Intelligence	Pay inflation increase to Legal SLA	7
Corporate Services	Legal Democratic Services & Business Intelligence	Restructure corporate support services (Cabinet)	36

Director	Head of Service Budget	Description	Savings 2024/25 £'000
Corporate Services	Legal, Democratic Services & Business Intelligence	Removal of surplus budget from Welsh Translation Unit budget	65
		<b>Corporate Services Total</b>	<b>897</b>
Education	Non-Delegated	ALN equipment for schools	25
Education	Non-Delegated	Better targeting of Education otherwise than at school (EOTAS) spending following full implementation of new model of provision	150
Education	Non-Delegated	Business support review	21
Education	Non-Delegated	Rationalisation of post-16 transport, reflecting reduced demand	30
Education	Non-Delegated	Continuing review and rationalisation of the directorate.	600
Education	Non-Delegated	Cost recovery of project officers for capital schemes	7
Education	Non-Delegated	Enhance in County provision reducing out of county costs	431
Education	Non-Delegated	Increase charge to clerk school governing body meetings	1
Education	Non-Delegated	Increase charge to schools for Home Tuition	5
Education	Non-Delegated	Increase charges for Catering service and SLA for schools	400
Education	Non-Delegated	Increase Cleaning SLA charges for schools	100
Education	Non-Delegated	Increase rent for caretakers' houses	1
Education	Non-Delegated	Independent and out of county school contracts	50
Education	Non-Delegated	New online payments provider for school meals	35
Education	Non-Delegated	Offset salary costs in School Improvement Team	32
Education	Non-Delegated	Reduce cost centre for historical pensions	20
Education	Non-Delegated	Transfer Health and safety budget and hold provision corporately	74
Education	Non-Delegated	Transfer Schools at Risk budget and hold provision corporately	109
Education	Non-Delegated	Reduced staff hours in Management Systems Team	10
Education	Non-Delegated	Delete absence management officer post from structure	48
Education	Non-Delegated	Review of ALN transport - minibus pilot	25
Education	Non-Delegated	Review of broadband contract for schools	15
		<b>Education (Non-Delegated) Total</b>	<b>2,189</b>
Finance	CTRS	Further CTRS savings on top up to another 10%	40
Finance	CTRS	Rebase Council Tax Reduction Scheme	1,400
Finance	Directorate	Miscellaneous budget reductions/efficiencies	97
Finance	Revenues and Benefits	Accelerate agreed Revs and Benefits changes	93
		<b>Finance Total</b>	<b>1,630</b>

Director	Head of Service Budget	Description	Savings 2024/25 £'000
Place	Building Services	Additional income generation through significantly increased work programme	700
Place	Cultural Services	Increase fees and income targets in line with inflation	10
Place	Cultural Services	Resume 'bid' payment reductions for Leisure partner	300
Place	Cultural Services	Reduce the Library staffing budget to reflect current staff turnover	179
Place	Cultural Services	Do not progress the additional proposed new Christmas Light show event as now established at Margam park.	60
Place	Directorate	Review Place management structure on completion of Council Job Evaluation scheme review	60
Place	Highways & Transport	Additional Energy saving from implementing LED lamps from extra investment	30
Place	Highways & Transport	Activate bus lane and other moving traffic offences camera enforcement at Junctions to assist in reducing traffic congestion and commuter delays	150
Place	Highways & Transport	Increase street works and licencing fees annually in line with inflationary	25
Place	Highways & Transport	Increase charges and income from Marina and Knab Rock In line with inflation	20
Place	Highways & Transport	Operate an Additional Parking Enforcement camera car	43
Place	Highways & Transport	Review Parking Services Team	25
Place	Housing & Public Health	Increase fees for burials and Cremations over the next 4 years by 5% annually.	137
Place	Housing & Public Health	Increase fees for registrars over the next 4 years by 5% annually.	32
Place	Housing & Public Health	Remove surplus security budget for cemeteries and crematory	11
Place	Housing & Public Health	Increase in Fee Income for Animal Licensing (food safety)	5
Place	Housing & Public Health	Increase Food Safety and Trading Standards Fees by 15%	5
Place	Housing & Public Health	Increase in Fees for next 4 years Building Control (in accordance with Land Authority Building Charges Regulations 2010)	24
Place	Housing & Public Health	Increase pest control fees to 15% for schools' contract and general pest control	5
Place	Housing & Public Health	Reduction in number of air quality monitoring sites across Swansea & associated maintenance/servicing of equipment from end-of-life system	10
Place	Housing & Public Health	Review Public Health Service	6

Director	Head of Service Budget	Description	Savings 2024/25 £'000
Place	Planning and Regeneration	Increase Land Charges Income	5
Place	Planning and Regeneration	Increase Planning Fee Income	25
Place	Planning and Regeneration	Review Nature Conservation, Regeneration, Economic Development, & Planning sections	39
Place	Planning and Regeneration	Revise Swansea Market Rent Charges (but also separately invest more core Council funding into market as well)	50
		<b>Place (Total)</b>	<b>1,956</b>
Social Services	Adult Integrated Services for Older People	Further remodelling in line with delivery of WG policy for a Healthier Wales and the rebalancing policy commitment. Ensuring appropriate levels of investment from WG and Health Board. Ensure S33 arrangement for intermediate care has equitable contributions. For Year 1 of the saving target this is about reviewing workforce skills mix of the Council therapy teams to support focus of admission avoidance and ensuring appropriate levels of care. This will underpin best use of in-house capacity.	750
Social Services	Adult Services	Reduce discretionary spend, where appropriate e.g. taxi, supplies and services.	50
Social Services	Adult Services	Through contract efficiencies review the council payments and contributions for third party top up fees in residential care settings where alternatives care homes are available	50
Social Services	Adult Services & Integrated Services for Older People	Continue progress to a different mix of delivery	350
Social Services	Adult Services, Prevention and Tackling Poverty	Change current model of extra care services and recommission a different operating model to achieve efficiencies and better outcomes for individuals	150
Social Services	Adult Services, Prevention and Tackling Poverty	Increase fees for some Life Long Learning courses	45
Social Services	Adult Services, Prevention and Tackling Poverty	Work though Complex Needs high cost placements and establish a collaborative approach with Health for funding these packages of care to achieve a reduction in the overall costs of these packages due to more efficient and effective working with health in terms of new guidance around continuing health care cases	500
Social Services	Child & Family Services	Reduce discretionary spend, where appropriate e.g. S17, taxi, supplies and services	100

Director	Head of Service Budget	Description	Savings 2024/25 £'000
Social Services	Child & Family Services	Reduce the number of 16 - 17 years olds who become homeless by re-modelling provision as a preventative service to understand move on plan for young people and to make sure all family options have been explored before placing in supported accommodation in line with core and grant spend in this area	50
Social Services	Child & Family Services	Target financial support offered to care leavers in line with statutory duties, to ensure avoidable accommodation costs and discretionary spend is minimised, so that it is fair and equitable and in line with core and grant spend in this area	50
Social Services	Directorate	Ensure all back office processes are as business efficient as possible, which will reduce overall staffing costs through natural vacancies	300
Social Services	Directorate	Increase last year's re-introduced vacancy provision	1,000
Social Services	Directorate	Apply an uplift to areas of commissioned care services across Adult and Child & Family Services to enable providers to pay RLW and cover inflationary pressures	2,000
Social Services	Directorate	Fund non-statutory services to the minimum they require to successfully draw down grant funding (Training, Capital, Early Years)	300
Social Services	Directorate	Review senior management structure	350
		<b>Social Services Total</b>	<b>6,045</b>
		<b>Grand Total</b>	<b>12,717</b>

Please ensure that you refer to the Screening Form Guidance while completing this form.

**Which service area and directorate are you from?**

Service Area: Finance

Directorate: Financial Services

**Q1 (a) What are you screening for relevance?**

- New and revised policies, practices or procedures
- Service review, re-organisation or service changes/reductions, which affect the wider community, service users and/or staff
- Efficiency or saving proposals
- Setting budget allocations for new financial year and strategic financial planning
- New project proposals affecting staff, communities or accessibility to the built environment, e.g., new construction work or adaptations to existing buildings, moving to on-line services, changing location
- Large Scale Public Events
- Local implementation of National Strategy/Plans/Legislation
- Strategic directive and intent, including those developed at Regional Partnership Boards and Public Services Board, which impact on a public bodies functions
- Medium to long term plans (for example, corporate plans, development plans, service delivery and improvement plans)
- Setting objectives (for example, well-being objectives, equality objectives, Welsh language strategy)
- Major procurement and commissioning decisions
- Decisions that affect the ability (including external partners) to offer Welsh language opportunities and services
- Other

**(b) Please name and fully describe initiative here:**

**Budget Proposals 2024/25 – 2027/28**

This report updates Cabinet on its budget proposals for budget savings for consultation with residents, community groups and other stakeholders. It has full and due regard to our duties under the Well-being of Future Generations Act 2015.

This report covers:

- A reminder of key elements of *Sustainable Swansea* and the new Transformation Strategy & Programme Framework 2022 and Beyond.
- An overview of service and budget priorities for the current and following three years.
- An update on the financial challenge facing the Council.
- The proposed savings programme, including specific proposals for 2024/25 upon which we now need to consult and an indicative for three future years.
- The key risks associated with the current financial position.
- Proposals for engagement and consultation
- Staffing implications
- Delivery and next steps

Each budget proposal will be subject to its own IIA process, and Cabinet and Council will receive a full report on the feedback from the consultation and outcomes of the IIA process in February 2024 so that they can be fully taken into account before any decisions are made. This process has already begun and initial impacts identified have been used to inform this report.

There will also be full engagement with the Council's Scrutiny Committee.

**Q2 What is the potential impact on the following: the impacts below could be positive (+) or negative (-)**



	High Impact		Medium Impact		Low Impact		Needs further Investigation	No Impact
	+	-	+	-	+	-		
Children/young people (0-18)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Older people (50+)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Any other age group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Future Generations (yet to be born)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Disability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Race (including refugees)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Asylum seekers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gypsies & travellers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Religion or (non-)belief	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sex	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sexual Orientation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Gender reassignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Welsh Language	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Poverty/social exclusion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Carers (inc. young carers)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Community cohesion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marriage & civil partnership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Pregnancy and maternity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Human Rights	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**Q3 What involvement has taken place/will you undertake e.g. engagement/consultation/co-productive approaches? Please provide details below – either of your activities or your reasons for not undertaking involvement**

In terms of consultation, the Council intends to fulfil its obligations by:

- Undertaking a **Public Survey**. Specific budget proposals and those relating to the Commissioning Reviews will be included in the public survey that will be available online.
- **Consultation with groups**. We will promote the survey to a number of Groups including children and young people, groups with protected characteristics and organisations such as Community Councils.
- **Staff engagement**. The survey will be promoted to staff.
- **Unions**. The Leader, Cabinet Members and Officers are due to meet Union representatives to discuss the proposals.
- **Schools**. Officers and Members will consult head teachers on proposals that affect schools.
- **Promoting** and communicating the consultation via website and social media.

There will be on-going consultation during the forthcoming year as and when the individual Commissioning Reviews progress and develop their proposals for transforming services and helping to deliver contributions towards the overall savings requirement.

The Council will need to consult with Trade Unions about the 2024/25 savings proposals and the likely impact on staff; in particular, the management of change and selection criteria where posts are at risk of redundancy. It is a legal requirement and incumbent upon the Council to commence formal negotiations with the Trade Unions to seek to avoid the need for such redundancies, to consider alternatives and to seek to reach agreement on the selection process for redundancies, should we get to that position. This is in line with the requirements of Section

188 (1) of the Trade Union and Labour Relations (Consolidation) Act 1992 (as amended). This is on the basis that these proposals will potentially affect less than 99 employees (excluding schools) and that the period of consultation will be for a minimum of 30 days.

**Q4 Have you considered the Well-being of Future Generations Act (Wales) 2015 in the development of this initiative:**

- a) Overall does the initiative support our Corporate Plan’s Well-being Objectives when considered together?  
 Yes  No
- b) Does the initiative consider maximising contribution to each of the seven national well-being goals?  
 Yes  No
- c) Does the initiative apply each of the five ways of working?  
 Yes  No
- d) Does the initiative meet the needs of the present without compromising the ability of future generations to meet their own needs?  
 Yes  No

**Q5 What is the potential risk of the initiative? (Consider the following impacts – equality, socio-economic, environmental, cultural, legal, financial, political, media, public perception etc...)**

High risk

Medium risk

Low risk

**Q6 Will this initiative have an impact (however minor) on any other Council service?**

Yes  No If yes, please provide details below

**Q7 Will this initiative result in any changes needed to the external or internal website?**

Yes  No If yes, please provide details below

**Q8 What is the cumulative impact of this proposal on people and/or communities when considering all the impacts identified within the screening and any other key decisions affecting similar groups/ service users made by the organisation?**

*(You may need to discuss this with your Service Head or Cabinet Member to consider more widely if this proposal will affect certain groups/ communities more adversely because of other decisions the organisation is making. For example, financial impact/poverty, withdrawal of multiple services and whether this is disadvantaging the same groups, e.g., disabled people, older people, single parents (who are mainly women), etc.)*

Each proposal will be subject to its own IIA process and be subject to consultation where needed. A full report will be presented to Cabinet in February. The Council’s overall aim is to protect frontline delivery of services as far as possible. However, whilst many things are important, not everything can be a priority. It is important, therefore

(particularly in the current climate of significantly reduced resources), that we set out clearly our expectations on all services and relative priorities for funding in the context of the budget reductions that we face.

This requirement is illustrated sharply by the “gearing” effect of savings on services. In other words, if our current funding requirement of £90m over three years were applied, for example, just to Place Services, the budget for this area would be completely removed. Consequently, other areas such as Education and Social Care also need to face some relative real terms level of reduction over the next three years, given the relative size of their budgets. Equally, however, if the level of funding for 2024/25 were to be sustained in every future year, then these planning assumptions could be very fundamentally reshaped, and savings asks reduced or possibly even eliminated.

The Council is proposing indicative medium-term financial allocations following an assessment of our overall priorities and the financial context that we face.

The statement which follows is based on an assessment of services in relation to the following criteria:

- **Invest:** those Services where the Council will increase current levels of investment
- **Maintain:** those services where the Council will broadly maintain current level of spend in the medium term
- **Remodel:** those services where the Council will reduce the current level of spend over the medium term

Regardless of relative funding levels, there is an absolute requirement that all services must transform and strive for maximum efficiency.

### Outcome of Screening

**Q9 Please describe the outcome of your screening using the headings below:**

- **Summary of impacts identified and mitigation needed (Q2)**
- **Summary of involvement (Q3)**
- **WFG considerations (Q4)**
- **Any risks identified (Q5)**
- **Cumulative impact (Q7)**

This report updates Cabinet on its budget proposals for budget savings for consultation with residents, community groups and other stakeholders. It has full and due regard to our duties under the Well-being of Future Generations Act 2015.

Each budget proposal will be subject to its own IIA process and Cabinet and Council will receive a full report on the feedback from the consultation and outcomes of the IIA process in February 2024 so that they can be fully taken into account before any decisions are made. This process has already begun and initial impacts identified have been used to inform the budget proposals within the report.

(NB: This summary paragraph should be used in the ‘**Integrated Assessment Implications**’ section of corporate report)

Full IIA to be completed

Do not complete IIA – please ensure you have provided the relevant information above to support this outcome

NB: Please email this completed form to the Access to Services Team for agreement before obtaining approval from your Head of Service. Head of Service approval is only required via email.

<b>Screening completed by:</b>
<b>Name:</b> Rhian Millar/Sarah Willis
<b>Job title:</b> Access to Services Manager
<b>Date:</b> 21/12/2023
<b>Approval by Head of Service:</b>
<b>Name:</b> Ben Smith
<b>Position:</b> Chief Finance Officer
<b>Date:</b> 21/12/2023

Please return the completed form to [accesstoservices@swansea.gov.uk](mailto:accesstoservices@swansea.gov.uk)

# Agenda Item 7



## Report of the Cabinet Member for Economy, Finance & Strategy

Cabinet – 21 December 2023

### Revenue and Capital Budget Monitoring 2nd Quarter 2023/24

<b>Purpose:</b>	To report on financial monitoring of the 2023/24 revenue and capital budgets, including the delivery of budget savings.
<b>Policy Framework:</b>	Budget 2023/24. Transformation and Future Council
<b>Consultation:</b>	Cabinet Members, Corporate Management Team, Legal and Access to Services.
<b>Recommendation(s):</b>	It is recommended that Cabinet:  <ol style="list-style-type: none"><li>1) Notes the comments and variations, including the heightened material uncertainties around equal pay provisions, set out in the report and the actions in hand to seek to address these.</li><li>2) Approves the virements and the use of the Contingency fund as set out in 3.2 and the Inflation provision as set out in 4.3 subject to any further advice from the S.151 officer during the year.</li><li>3) Reinforces the need for all Directors to continue to minimise service spending in year, providing clear recovery plans where they are overspending, recognising that the budget overall is currently balanced only by relying on future (but far from wholly assured) reimbursement from Welsh Government, centrally held contingency budgets and increasingly reserves.</li><li>4) Recognises that directorate cost overspends must be absolutely minimised, through recovery plans, given the proposed material pay provision, in current year by targeted recovery action with a clear expectation of 'tough' rebasing choices to achieve a balanced budget for the 2024/25 budget round.</li><li>5) Note the indicative overspend in 6.1 with further actions to be confirmed in subsequent quarters once it is clearer as to the likely final cost of the equal pay award provision.</li></ol>
<b>Report Author:</b>	Ben Smith

<b>Finance Officer:</b>	Ben Smith
<b>Legal Officer:</b>	Debbie Smith
<b>Access to Services Officer:</b>	Rhian Millar

## **1. Background and Introduction**

- 1.1 This report details forecast variations from the agreed budget for 2023/24.
- 1.2 In respect of Revenue Budgets, this report provides a consolidated forecast, which combines:
- projected variations in relation to budget savings agreed by Council in March 2023
  - Variations arising from other service pressures not directly linked to specific savings plans (e.g. increased service demand, price and pay inflation, increased, but most often unfunded, regulatory obligations and burdens from both UK and Welsh governments)
- 1.3 The report includes comments from Directors in relation to the variations highlighted and the action that is in hand or proposed as appropriate.
- 1.4 The implementation of Oracle Fusion delayed Quarter 1 reporting by one monthly cycle but the system is now working sufficiently well enough to give assurance to the S.151 Officer that the finance and performance reporting process is working in line with previous expectations and timescales. The remaining issues are considered not fundamental to the core budget monitoring and reporting on the financial position.
- 1.5 There is also, as members will be aware widescale reporting of financial pressures especially in England. Risks are growing for the whole of local government and whilst the Council has high earmarked reserves, with an equally ambitious set of spending plans to match, it has especially low General Reserves already at the absolute minimum of acceptability to the S.151 Officer. In line with all other councils, it is now rapidly reviewing once again equal pay claims and potential liabilities. At this stage, prudently, a new pay liability, tentatively priced at £15m is included in the projections. Even if it were proven fully needed (and it is indeed contingent on other events first before being wholly assured), it can be afforded, albeit with consequences (by reducing options for other spending elsewhere) and is proposed to be fully covered by an equal pay provision created and charged in the current year on the recommendation of the S.151 Officer.

## **2. Revenue Outturn Forecast Based on 2nd Quarter Position**

- 2.1 Appendix 'A' to this report details the approved Revenue Budget for 2023/24 and the forecast variation at this time.
- 2.2 Other than projected variations on Directorate expenditure, it is still too soon to confidently forecast final variations that may arise on some significant Corporate items, including the level of Council Tax collection (which posted a small surplus in 2022/23 of £32k). At present, break-even is assumed, but there may be some

scope for a repeated surplus given a very prudent (lower) level of collection rate was set for 2023/24.

2.3 The overall Directorate position is summarised below:-

**DIRECTORATE**

	<b>FORECAST VARIATION 2023/24 £000</b>
CORPORATE SERVICES	-35
FINANCE	-656
SOCIAL SERVICES	2,312
EDUCATION	465
PLACE	3,656
<hr/>	
<b>NET SERVICE EXPENDITURE</b>	<b>5,742</b>

2.4 Directors' comments on the above variations are shown at Appendix B.

2.5 Within the *Successful and Sustainable Swansea Corporate Transformation Plan*, work continues to develop service delivery plans linked to savings targets and prioritisation of services. This includes the cross-cutting nature of new reviews as well as the completion of current in-flight reviews.

2.6 The table above shows an estimated service overspend for the year of £5.742 million but this will ultimately be influenced by the final pay award once implemented.

2.7 Services are now operating business as usual but there will be an ongoing impact from Covid for example where income levels have not recovered fully.

2.8 Service variations currently assumed the existing local government pay offer will be implemented as is at some point (an average 7% pay award but with wide variations between grades). The pay offer from the Employers remained a flat rate £1,925, which was fully budgeted for, but some Trade Unions were in dispute with national employers. The pay deal has now been accepted by a majority of unions and has been implemented and paid after the cut off point for this second quarter forecast but before the time this report is being considered at Cabinet. Vehicle fuel costs are already feeding into reported forecast overspends in some areas (home to school transport and bus services support) and these are reflected where known but remain volatile. Whilst in year energy costs are being closely monitored and assessed to remain afforded within reasonable tolerance of the overall budgets set for the current year, because of material and **one-off** earmarked use of reserves to provide for **one-off** enhanced central inflation budgets, the position remains extremely volatile and challenging for new energy forward purchases and will undoubtedly be a very significant burden on future year base budgets (£millions).

2.9 Corporate Management Team has re-enforced the current arrangements for budget monitoring in particular:

- focus on a range of corrective actions,

- targeted immediate spend minimisation and deferral action,
- strict spending control on **all** vacancies and contracts,
- a continued reminder that **no Responsible Officer is authorised to overspend their budget in line with Financial Procedure Rules**,
- consequently, that Directors must work closely with Cabinet Members and the Corporate Management Team to contain, reduce, defer, and delay spending as far as possible, having due regard, to existing agreed budget and political priorities to nonetheless seek to limit service spending,
- to agree credible recovery plans where there is current overspending and for these to be shared and agreed with the Chief Executive and S.151 Officer for assurance purposes,
- whilst recognising that the overall spend pressures are near wholly post-Covid, inflation or pay award and now pay risk related and that reserves were bolstered to temporarily assist with some such pressures.

2.10 Offsetting opportunities do exist to temporarily ameliorate some of the currently identified service demand and price pressures as follows:

- £20.330m was set aside mostly **one-off** to meet any significant inflationary increases arising in year, specifically for the increased energy costs. Given the overall financial projection at this stage, it is proposed by the S.151 Officer that any residual sum be earmarked as a compensating funding mechanism for part of the new equal pay provision.
- Use of the Contingency Fund as detailed below.

### 3. Contingency Fund Provision for 2023/24

3.1 The Contingency Fund budgeted contribution was set at £6.118m contribution for 2023/24 as set out in the budget report approved by Council in March 2023. There was no balance brought forward from 2022/23 as the Contingency Fund was fully utilised, so the total available for use in 2023/24 remains at £6.118m.

3.2 The current potential calls on the Contingency Fund for 2023/24 are:

<b>Contingency Fund 2023/24</b>	<b>2023/24 (£m)</b>
Budgeted contribution for year.	6.118
Funding Agreed deferred specific savings as per Council decision 2 <sup>nd</sup> March 2023	-0.901
Corporate Services Items - various one-off items reflecting known cost pressures (inc. coroners costs, card processing fees) – to be addressed in base in future years	-0.330
Corporate Services – Auditel costs to improve hybrid meeting functionality/stability	-0.027
Corporate Services make good slight shortfall on already agreed Recovery Fund Scheme to support occupational health expansion	-0.018
Potential legal costs – litigations and mitigations	-0.500
Place Services additional costs as per Exempt Cabinet Decisions in year – Regeneration	-0.825
Defibrillators – additional roll out	-0.075



EMS vehicle costs	-0.005
Car Parks extended offer on pricing tariffs	-0.850
Part contribution for new Equal Pay Provision	-2.587
<b>Balance 31st March 2024</b>	<b>0.0</b>

The above table lists current potential calls on the budgeted Contingency Fund. All are anticipated to be one off costs. The final amounts will be dependent on a number of factors during the year including speed of implementation, actual costs/commitments incurred and final Directorate outturn position. Spend approvals will be deliberately limited to seek to maximise underspend here as part of mitigating budget savings action, including equal pay risks.

As at 1<sup>st</sup> April 2023 the balance of the Restructure Reserve was £2.8m, however on 20<sup>th</sup> April 2023 Cabinet agreed the use of £2.433m of this for the Workforce and Digital Transformation programmes, leaving a balance of £0.367m to contribute toward ER/VR or other cost risks that may arise in 2023/24. The S.151 Officer remains satisfied that this is sufficient for 2023/24 taken in conjunction with the balance on contingency this year to fund such costs. The final costs of ER/VR will only be known towards the end of the year once all management actions re savings proposals etc are implemented. At this stage it is assumed that all ER/VR costs will be able to be contained either within Services or from existing earmarked reserves.

Based on current forecast the S.151 Officer proposes to utilise the current year forecast underspend on the Contingency Fund of up to £2.587m to provide additional mitigation, together with the forecast unused element of the inflation provision of £3.649m (some £6.236m in total) toward the potential equal pay risk provision.

**The one-off nature of the funding sources cannot be understated, the excess unbudgeted base costs will impact directly and significantly on the base budget pressures for 2024/25 and do not solve the inflationary pressures, merely defer most of the problem a year.**

However, the S.151 Officer proposes to reserve his final position on the recommended levels of use of the Restructure Reserve and Contingency Fund until the absolute success or otherwise of reducing the forecast overspend is known at year-end.

3.3 The current indication is that, for 2023/24, there needs to be continued targeted mitigating action and delivery of savings proposals to help reduce the overall overspend. It looks inevitable as this early stage that some draws from contingency and earmarked reserves will be needed to achieve a fully balanced budget for the year, but this was somewhat anticipated and led to the material bolstering of earmarked reserves at outturn and the enhanced **one-off** central inflation provision. Any inroads to net spending will reduce the necessary draw from reserves and increase the amount of reserves available to carry into 2024/25.

3.4 The action being taken includes working through existing plans on an accelerated delivery basis:

- Management and Business Support Review: ongoing review of the management structure across the Council and future requirements given the

Council's priorities, future challenges and the changing nature of the role of managers.

- Managing the Pay Bill: review of options to contain or reduce employee costs across the Council as part of our overall future workforce strategy (subject to trade union consultation at the appropriate time).
- Commercialism through third party Procurement Savings and Income Generation: review of further options to increase income from fees and charges, trading etc, in addition to the targets already set.
- Progressing implementation of residual phases Commissioning Reviews and Cross Cutting Themes.
- Further implementation of the Social Services Saving Plan through which we have identified mechanisms for bringing down overall costs.
- On the basis that these are existing agreed actions fully set out in the agreed budget set by Council in March.
- Continuing the extant spending restrictions which have been agreed as necessary by Corporate Management Team.
- Directors detailed action plans as summarised in their Appendix B commentary.
- The Director of Corporate Services leading the Recovery Plan implementation as agreed by Cabinet to agree alternative mitigating actions and future steps, taking into account post Covid 19 and Brexit.

3.5 It should be noted that at this time, although the Council continues to pursue VAT related claims when applicable, there is NO certainty of windfalls from VAT refunds, or any other external source being received in the current year.

#### 4. Inflation Provision 2023/24

4.1 The 2023/24 budget includes a provision of £20.330m for both inflation (£19.330m) and the Apprenticeship Levy (£1m). This was increased specifically because of the levels of general inflation forecast for 2023/24 and because of the unprecedented energy price rises.

4.2 The Apprenticeship Levy funding will be wholly needed for the Levy this year, with no underspend available to fund service overspending.

4.3 The current potential calls on the Inflation Provision are as follows:

<b>Inflation Provision 2023/24</b>	<b>2023/24 (£m)</b>
Budgeted contribution for year.	19.330
Social Care Energy Costs	-1.000
Education Home to School Transport Costs	-1.000
Schools Energy Costs	-6.000
Council as Corporate Landlord Energy Costs (Including Street Lighting)	-6.000
Community Groups Energy Costs support	-0.250
Freedom Leisure Energy Costs support	-1.021
Wales National Pool Energy costs support	-0.200
Arena Energy Costs support	-0.210
<b>Balance 31st March 2024</b>	<b>3.649</b>

## 5. Savings Tracker 2023/24

- 5.1 Since the onset of the COVID pandemic, the service savings built into the annual budget have not been specifically and separately monitored. As the budget has been underspent in each year then the savings have been assumed to be met.
- 5.2 As the operation of the Council is now back to “business as usual” the monitoring of specific savings has resumed. In line with the monitoring process pre-pandemic, each Director monitors and reports on progress of individual savings. A summary of this progress is attached at Appendix C.
- 5.3 The summary shows that against a savings target of £21.9m, £16.6m or some 76% is forecast to be achieved by the end of the year.
- 5.4 In addition to the list of savings deferred one year at Council in March 2023, any minor previous savings proposed funded temporarily in year from contingency as part of Cabinet budget monitoring reports will be treated as equivalently deferred and removed from the target.

## 6. Revenue Budget Summary

- 6.1 The position reported above reflects the best-known current position and shows a net £5.742m shortfall in service revenue budgets. This is as a result of pressures mainly in the care sector and home to school transport.

### Summary

	£'m
Service Forecast overspend	5.742
Estimated equal pay provision	15.000
<b>Less Mitigating</b>	
Inflation provision earmarked for estimated equal pay provision	-3.649
Contingency Fund earmarked for estimated equal pay provision	-2.587
Capital financing underspend exceptionally not added to Capital Equalisation Reserve	-7.000
<b>Net overspend forecast, currently met by additional draws from reserves</b>	<b>7.506</b>

- a. Corporate Management Team have reinforced the expectation that both service and overall net expenditure **must** be, contained within the relevant limits of the current year budget as set by Council, and certainly within any agreed level of tolerance set by Cabinet on the advice of the S.151 Officer.
- b. Included in the projected budget for 2023/24 for other corporate items are capital finance charges. At this stage there is a likely £7m minimum underspend on capital finance charges and any underspending here will now be required to help fund the equal pay provision and thus will **exceptionally**

**not** be available to add to the Capital equalisation Reserve this year. This will be reviewed and updated during the year as emerging capital demands and equally slippage arise. The implemented capital financing strategy was formulated to smooth the impact of the implementation of the revised MRP policy whilst also taking advantage of drawing down long-term borrowing at historically low interest.

- c. There continue to be risks around general inflationary pay and price pressures this year and for future years, including increases to the National Living Wage which will significantly impact contractors to the Council in some service areas next year. It will also put further pressure on the lower end of the current local government pay spine in future years. There is finally resolution to the 2023/24 national local government/teachers' pay awards, but attention will already be turning to next year's pay negotiations which will continue to be dominated by affordability issues on one hand with persisting, albeit likely falling, inflation and the impact of the rise in the Real Living Wage.
- d. Detailed monitoring of budgets will continue and will be reported to the monthly Departmental Performance and Financial Management meetings.
- e. It remains imperative that sustainable base budget savings are found to replace in year one off actions to stabilise the 2023/24 budget ahead of the 2024/25 budget round.

6.2 Costs in the delivery and implementation of the Oracle Fusion ICT project estimated arising directly as a result of delays related mostly to the pandemic are needing to be funded during 2023/24. The S.151 Officer proposed to meet these costs from reserves already established and already carried forward. A separate project update report was considered at Cabinet in October 2023.

## 7. Capital Budget

7.1 Expenditure to 30th September 2023 is £41.595 million, summarised as follows:

Directorate	Budget 2023/24	Actual to 30/09/23	% Spend
	£'000	£'000	
Corporate Services	3,521	317	9.0%
Finance	985	0	0.0%
Education	10,594	1,598	15.1%
Social Services	2,208	89	4.0%
Place (General Fund)	143,667	25,746	17.9%
Place (HRA)	47,728	13,845	29.0%
<b>Total</b>	<b>208,703</b>	<b>41,595</b>	<b>19.9%</b>

Expenditure on major capital schemes is detailed in Appendix D.

Second quarter expenditure figures remain low, however this is expected to pick for the remainder of the financial year. The general impact of inflation remains pervasive across the wider economy and continues to have an impact on all capital projects where materials and external labour is required.

However, material increases above 5% of the cost of a programme are required to be formally approved.  
There is an expected impact on the revenue Capital Financing Charges in 2023/24 and future years.

## **8. Housing Revenue Account**

- 8.1 The HRA has faced significant inflationary pressures over recent years. These pressures continue and have led to the need to increase revenue budgets significantly for 2023/24. Higher than forecast increases in employee costs, increases in utility costs and in particular increases in materials costs for revenue and capital repairs has meant that there will be less financial resources available to the HRA to fund Capital projects in the medium and longer term.
- 8.2 The revenue repairs budget for 2023/24 has been increased by £4.4m however there are still significant additional demands on this budget. These include, the back log of repairs following Covid, additional spend on void repairs to speed up relet times because of the Homelessness crisis and the additional repair requirements of the Welsh Government's Renting Homes legislation. This budget will be closely monitored over the course of the year to ensure there is sufficient funding to meet these needs.
- 8.3 The current economic climate and cost of living crisis, along with Welfare Reform and the continued implementation of Universal Credit are impacting rent collection rates, and it is being closely monitored with measures employed to mitigate these impacts. During this quarter, rent arrears and the number of households in rent arrears have risen and it is projected they will continue to increase throughout this year. It is too early in the year to forecast the full impact on rent arrears and the budgeted Bad Debt Provision.

## **9. Legal Issues**

- 9.1 There are no legal issues contained within this report.

## **10. Integrated Assessment Implications**

- 10.1 The Council is subject to the Equality Act (Public Sector Equality Duty and the socio-economic duty), the Well-being of Future Generations (Wales) Act 2015 and the Welsh Language (Wales) Measure, and must in the exercise of their functions, have due regard to the need to:
- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Act.
  - Advance equality of opportunity between people who share a protected characteristic and those who do not.
  - Foster good relations between people who share a protected characteristic and those who do not.
  - Deliver better outcomes for those people who experience socio-economic disadvantage.
  - Consider opportunities for people to use the Welsh language.

- Treat the Welsh language no less favourably than English. Ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs.
- 10.2 The Well-being of Future Generations (Wales) Act 2015 mandates that public bodies in Wales must carry out sustainable development. Sustainable development means the process of improving the economic, social, environmental and cultural well-being of Wales by taking action, in accordance with the sustainable development principle, aimed at achieving the 'well-being goals'.
- 10.3 Our Integrated Impact Assessment (IIA) process ensures we have paid due regard to the above. It also takes into account other key issues and priorities, such as poverty and social exclusion, community cohesion, carers, the United Nations Convention on the Rights of the Child (UNCRC) and Welsh language.
- 10.4 The Revenue budget of the Council was approved following the application of the corporate Integrated Impact Assessment (IIA) process throughout the Budget setting process. It is essential where service levels are affected by changes to the Revenue Budgets (including savings options) that the IIA process (alongside consultation and engagement as appropriate) is applied to ensure due regard is paid to the potential equality impacts of any proposals prior to decision making.

**Background papers:** - None

**Appendices:**

Appendix A – Revenue Budget forecast 2023/24

Appendix B – Directors comments on variances and action plans

Appendix C – Savings Tracker

Appendix D – Expenditure on major Capital Schemes

REVENUE BUDGET PROJECTION QUARTER 1 2023/24

Appendix A

<b><u>DIRECTORATE</u></b>	<b>BUDGET 2023/24 £000</b>	<b>PROJECTED 2023/24 £000</b>	<b>VARIATION 2023/24 £000</b>
CORPORATE SERVICES	21,884	21,849	-35
FINANCE	33,738	33,082	-656
SOCIAL SERVICES	158,032	160,344	2,312
EDUCATION	215,052	215,517	465
PLACE	76,655	80,311	3,656
<b>NET DIRECTORATE EXPENDITURE</b>	<b>505,361</b>	<b>511,103</b>	<b>5,742</b>
SPECIFIC PROVISION FOR APPRENTICESHIP LEVY/INFLATION	15,330	11,681	-3,649
CONTINGENCY FUND	4,764	2,177	-2,587
<i>Estimated Equal Pay Provision</i>	0	15,000	15,000
<b>OTHER ITEMS</b>			
LEVIES			
SWANSEA BAY PORT HEALTH AUTHORITY	89	89	0
CORPORATE JOINT COMMITTEE	212	212	0
CONTRIBUTIONS			
MID & WEST WALES COMBINED FIRE AUTHORITY	17,122	17,122	0
<b>CAPITAL FINANCING CHARGES</b>			
PRINCIPAL REPAYMENTS	15,574	15,574	0
NET INTEREST CHARGES	23,360	16,360	-7,000
<b>NET REVENUE EXPENDITURE</b>	<b>581,812</b>	<b>589,318</b>	<b>7,506</b>
<b>MOVEMENT IN RESERVES</b>			
GENERAL RESERVES	0	0	0
EARMARKED RESERVES	-22,278	-29,784	-7,506
<b>TOTAL BUDGET REQUIREMENT</b>	<b>559,534</b>	<b>559,534</b>	<b>0</b>
DISCRETIONARY RATE RELIEF	418	418	0
<b>TOTAL CITY AND COUNTY OF SWANSEA REQUIREMENT</b>	<b>559,952</b>	<b>559,952</b>	<b>0</b>
COMMUNITY COUNCIL PRECEPTS	1,829	1,829	0
<b>TOTAL REQUIREMENT</b>	<b>561,781</b>	<b>561,781</b>	<b>0</b>
<b>FINANCING OF TOTAL REQUIREMENT</b>			
REVENUE SUPPORT GRANT	339,280	339,280	0
NATIONAL NON-DOMESTIC RATES	79,002	79,002	0
COUNCIL TAX - CITY AND COUNTY OF SWANSEA	141,670	141,670	0
COUNCIL TAX - COMMUNITY COUNCILS	1,829	1,829	0
<b>TOTAL FINANCING</b>	<b>561,781</b>	<b>561,781</b>	<b>0</b>

## Director's comments on budget variances

### Director of Corporate Services

The budget position in the second quarter reports that the Corporate Services directorate is forecasting an underspend of £35,000 by the year end.

Variance (under -)/over spend	£000	Explanation and Action
Director of Corporate Services	-136	Underspend as a result of efficiency measures within the directorate, which will be used to help offset the forecast overspend in HR&OD.
Communications and Marketing	-77	Net employee and Supplies and Services underspend across the services
Digital and Customer Services	0	Various compensating under/over spends relating to staff costs, contracts and licenses, but overall forecasting break even by year end.
Human Resources and Organisational Development	178	Overspend forecast due to unfunded card transaction fee costs.
Legal and Democratic Services	0	Various compensating under/over spends relating to staff costs and external legal fees, but overall forecasting break even by year end.
<b>Total Forecast Variation</b>	<b>-35</b>	

### Director of Finance

The budget position in the first quarter shows the Finance directorate underspending.

Variance (under -)/over spend	£000	Explanation and Action
Council Tax Reduction Scheme (CTRS)	-347	Demand led spending which continues to be carefully managed to contain costs. Demand is monitored monthly and is rising month on month and consequently the current year end forecast underspend may yet reduce further during the year.
Other variations	-309	Modest underspending across a range of employee and supplies and services costs.
<b>Total Forecast Variation</b>	<b>-656</b>	



## Director of Social Services

Variance (under -)/ overspend	£000	Explanation and Action
Adult Services, Prevention and Tackling Poverty	1,328	<p>There are £2.2m of pressures in respect of support for those with Mental Health and Learning Disabilities, with £1.25m of this attributable to the cost of external residential care.</p> <p>An overspend of £761k is forecast in respect of Direct Payment costs.</p> <p>These pressures are offset by an income and vacancy driven underspend of £962k within our Direct Service Provision.</p>
Child & Family Services	-489	A forecast staffing underspend of £2.45m has been offset by an expected overspend within Independent Placements.
Grants, Commissioning & Partnerships	-220	Underspends forecast in this area are attributable to staffing and grant income.
Integrated Services for Older People	1,684	<p>We are forecasting overspends in respect of the Domiciliary Care and Residential Care that we commission. The largest overspend is £1.2m in respect of Domiciliary Care, where activity levels have increased but income levels have not followed.</p> <p>This is partially offset by forecast underspends our own staffing establishment.</p>
Resources Hub	9	A small overspend is currently forecast.
<b>Total Social Services</b>	<b>2,312</b>	

### Director's Comments

We are currently forecasting an overall overspend of £2.3m for the Directorate. The largest area of overspend remains our Externally Commissioned Care and we have identified pressures across the Directorate that contribute to this in respect of both income and expenditure.

Whilst the current forecast is that the Directorate will overspend, there are several significant underspends currently forecast with the majority pertaining to staffing. We are conscious of the impact of staffing vacancies and actions to fill vacant posts are

a business priority. Current forecasts presume current vacancies will be filled on a timely basis.

I have shared my recovery plan with the relevant Cabinet Members, the Chief Executive and the Director of Finance who are assured the Directorate is taking all necessary and reasonable steps to conserve spend and maximise partner contributions. Should it be required, we will consider the targeted use of service specific earmarked reserves to get the optimal balance of living within our budget and ensuring prioritised care needs are met.

### **Director of Education**

<b>Variance (under -)/ overspend</b>	<b>£000</b>	<b>Explanation and Action</b>
Vulnerable Learner Service	850	<p>£550k of this overspend relates to Maes Derw/PRU. This is due to overspends on staff, agency and transport along with an unachievable saving.</p> <p>There is also a projected overspend of £195k relating to transport costs of independent placements and up to £200k overspend on Psychology (depending on pay award).</p> <p>These are partially offset by forecast underspends due to some in year grants offsetting core budget.</p>
Education Planning and Resources	-2,355	A forecast underspend on primary and secondary school maternity and pension payments, and also increased income for the School Meals Service.
Achievement and Partnership Service	-315	Underspends forecast in this area are largely attributable to staffing and some supplies and services.
School Transport	2,285	We are forecasting overspends in respect of School Transport. This is Primary and Secondary mainstream, Special Schools, and also additional learning needs (ALN). £1m has been funded from the central inflation provision to offset increasing costs.
<b>Total Education</b>	<b>465</b>	

### **Director's Comments**

We are currently forecasting an overall overspend of £465k for the Directorate but with careful planning, one off savings and utilising grants in year, this will be mitigated by year end.

School Transport is predicted to overspend by £2.3m, due to increases in fuel and contract prices, and is subject to change as the indexation for September has to be finalised, although this is expected at 2.75%. There has also been a steady increase in demand, particularly for learners with additional needs. There are also savings targets for walking routes which are taking longer to implement and be achieved. The overall position has improved since the last quarter due to a £1m budget increase from the inflation provision acknowledging the uncontrollable pressure the service is facing.

The Vulnerable Learning Service and Pupil Referral Unit (PRU) is also predicting an overspend of £850k. This is largely due to the use of agency staff and transport of pupils. This is being monitored and where appropriate changes made, i.e. taking on temporary/fixed term staff to reduce agency costs. The Psychology Service is overspent, however until the Soulbury pay award has been agreed, the full impact on this budget and other areas within the service is unknown and estimated at this stage.

Whilst the overall forecast is that the Directorate will overspend, there are several significant underspends currently forecast which will help offset some of this. Currently maternity and pensions paid to primary and secondary school staff is volatile and by the final quarter we will hopefully have a better understanding of demand and will have reduced expenditure which will be used to offset the predicted overspend. This supports the MTFP where £1.6m of savings have been allocated against maternity and pensions at schools.

We continue to focus on controlling our costs and maximising income from grants and will continue to use grant funding to offset core costs where this is allowable.

There are other areas of identified demand and cost pressures, in spite of the continuing delivery of the Education strategy, but these are anticipated to be largely offset by further one-off managed savings in addition to those already reflected in the MTFP.

**Director of Place**

<b>Variance (under -)/over spend</b>	<b>£000</b>	<b>Explanation and Action</b>
Culture, Tourism, Sport & Leisure	721	Operational and income pressures.
Housing and Public Protection	285	Due primarily to spend and income pressures in Cemeteries & Cremations. Mitigating measures elsewhere will improve year end position.
Economic Regeneration and Planning	586	Due primarily to lower Planning fee income and Swansea Market overspend. Some mitigation before year end but not in full.
Highways and Transportation	-190	Overachieved income and employee underspends offset by operational pressures.
Waste Management,	3,479	Historic and predicted pressure -

Parks and Neighbourhood Working		unfunded agency pay award, increased plastic collection costs, increased fleet maintenance costs, increases in diesel costs. Spend mitigation measures in place but will not recover year end position.
Corporate Building Services	0	Break even predicted.
Corporate Property Services	-1,225	NNDR reimbursement (£1,100k) and additional rental income (£125k).
<b>Total Forecast Variation</b>	<b>3,656</b>	

### Director's Comments

The Directorate is currently projecting a £3.656m overspend for the year ahead. This overspend is after a £5.464m temporary 'one-off' virement from the central inflation reserve to offset spending pressures arising from increased utility costs. In addition, a number of significant budget pressures are noted and there will be use of budgeted contingency allocated to the Directorate in response to the ending of Welsh Government funding for loss of income and other impacts that continue in the period of recovery post Covid. The aim for the next 2 quarters will be to implement a budget recovery plan to mitigate any Directorate overspends identified and minimise the call on contingency. Whilst income is recovering in some key areas, the rate of recovery remains slow and is impacting a range of services, fees and charges. This will continue to be monitored closely but, because of the prevailing economic conditions, is unlikely to return to pre-pandemic levels in the short to medium term meaning further efficiencies will continue to be required. Car park income is a significant unknown and remains supported in year by the Economic Recovery Fund. In addition, inflationary pressures continue to be experienced across all areas of the Directorate.

As is the case with any large directorate there are some other non-income related projected overspends, including costs associated with rising price of utilities, but as above and, whilst it can by no means be guaranteed, a net balanced budget remains the aim.

## Overall Summary of Savings Achievement

Directorate	Savings TARGETS 2023/24 £'000					Total TARGET 2023/24 £'000
	Black	Red	Amber	Green	Blue	
Corporate Services	228	43	98	70	2,384	2,823
Finance (Including Council Tax Reduction Scheme)	0	185	1,491	104	530	2,310
Social Services (Including Poverty & Prevention)	0	650	100	2,800	2,550	6,100
Education	0	341	0	980	650	1,971
Place	733	142	1,317	2,883	3,630	8,705
<b>Total</b>	<b>961</b>	<b>1,361</b>	<b>3,006</b>	<b>6,837</b>	<b>9,744</b>	<b>21,909</b>
	Savings DELIVERY 2023/24 £'000					Total DELIVERY 2023/24 £'000
	Black	Red	Amber	Green	Blue	
Corporate Services	0	0	50	70	2,358	2,478
Finance (Including Council Tax Reduction Scheme)	0	0	1,366	104	530	2,000
Social Services (Including Poverty & Prevention)	0	0	0	2,650	2,550	5,200
Education	0	0	0	980	650	1,630
Place	0	0	324	1,367	3,630	5,321
<b>Total</b>	<b>0</b>	<b>0</b>	<b>1,740</b>	<b>5,171</b>	<b>9,718</b>	<b>16,629</b>
Overall Percentage Achieved	0%	0%	58%	76%	100%	76%

## Appendix D

<b>Capital expenditure on major schemes to 30 September 2023 (where spend greater than £250k)</b>	<b>£000's</b>
<b>Education</b>	
3G Pitch Olchfa Comprehensive	904
Free School Meals Scheme - Infrastructure / Equipment	391
<b>Place</b>	
City Deal - 71-72 Kingsway Offices	6,947
City Deal - Arena	694
Hafod Copperworks Powerhouse Redevelopment	383
LUF - Lower Swansea Valley	1,122
Palace Theatre Redevelopment	2,052
Acquisition of Black Boy Public House	383
Cefn Hengoed Community Hub	1,481
Corporate Building Services (Including Schools)	3,427
Disability Facility Grants	2,193
Mini Adaptation Grants	298
Highways Carriageway Resurfacing	1,912
Highways Footways	264
Highways Drainage Works	321
Highways & Transport Vehicle Replacement	400
Seawall Repairs Mumbles	3,246
Landfill Gas Engine Replacement	329
<b>HRA</b>	
HRA Capital Programme (More Homes Schemes)	3,168
Wind and Weatherproofing	4,246
External Facilities	2,047
Adaptations	1,265
Electric Rewiring	313
Chimney Repairs	356
Fire and Other Safety Measures	578
Boiler and Heating Upgrades	308
HRA Kitchens & Bathrooms	1,086
<b>Total scheme value where spend greater than £250k</b>	<b>40,114</b>

# Agenda Item 8



## Report of the Cabinet Member for Corporate Services & Performance (Deputy Leader)

Cabinet - 21 December 2023

### Quarter 2 2023/24 Performance Monitoring Report

<b>Purpose:</b>	To report corporate performance for Quarter 2 2023/24.
<b>Policy Framework:</b>	<i>Delivering a Successful &amp; Sustainable Swansea Corporate Plan 2023/28</i>
<b>Consultation:</b>	Access to Services, Finance, Legal.
<b>Recommendation(s):</b>	It is recommended that Cabinet:  1) Notes the Council's performance achieving the Council's wellbeing objectives in Q2 2023/24;  2) Endorses the use of this information to inform executive decisions on resource allocation and, where relevant, corrective actions to manage and improve performance and efficiency in delivering national and local priorities.
<b>Report Author:</b>	Richard Rowlands
<b>Finance Officer:</b>	Paul Roach
<b>Legal Officer:</b>	Debbie Smith
<b>Access to Services Officer:</b>	Rhian Millar

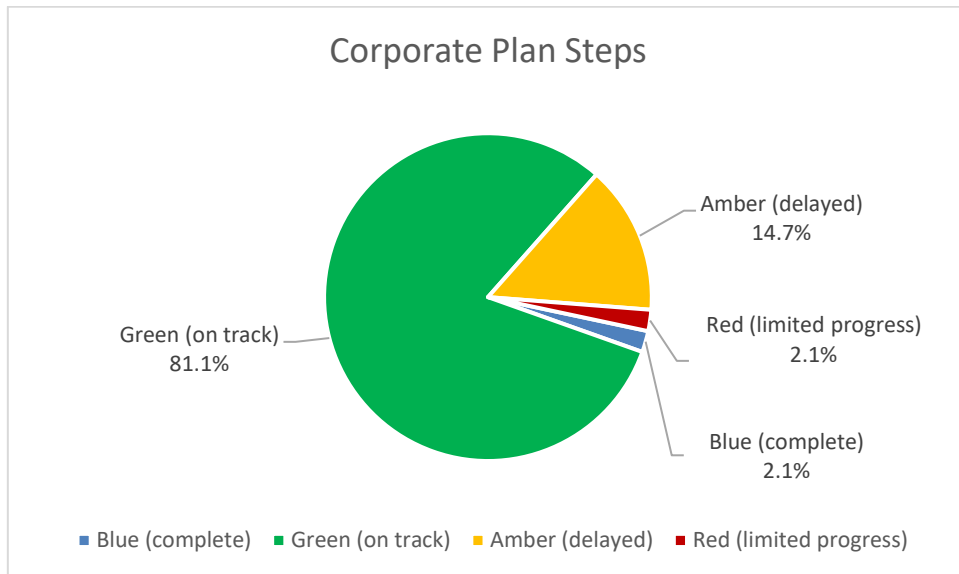
#### 1.0 Introduction

1.1 This report presents an update on quarter 2 2023/24 performance in respect of delivering the Council's Well-being Objectives (priorities) set out in the Corporate Plan 2023/28 *Delivering a Successful & Sustainable Swansea*:

- Safeguarding people from harm.
- Improving Education & Skills.
- Transforming our Economy & Infrastructure.
- Tackling Poverty & Enabling Communities.
- Delivering on Nature Recovery and Climate Change.
- Transformation and financial resilience.

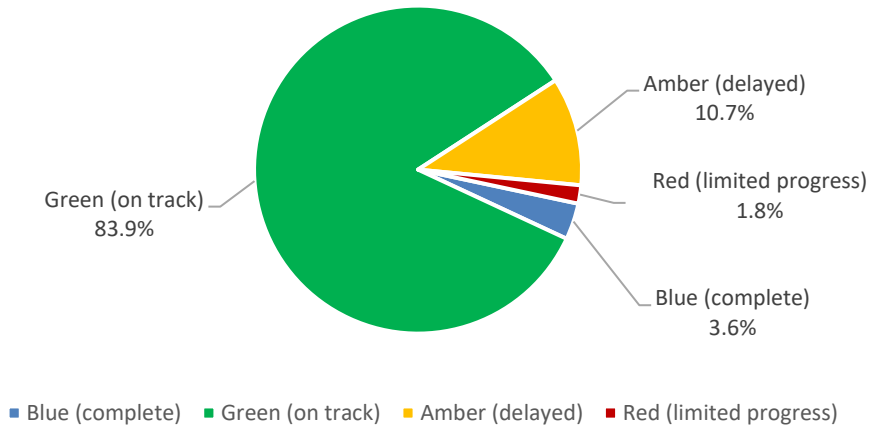
## 2.0 Council Performance: Corporate Plan Delivery Performance Q2 2023/24

- 2.1 The Council has been reviewing its performance management reports so that it can report on progress meeting the corporate well-being objectives in a more holistic way that incorporates both qualitative and quantitative data and offers a more rounded view of performance delivering the corporate priorities.
- 2.2 The report at Appendix A seeks to provide an evaluation of performance each quarter that integrates progress meeting the steps in the corporate plan with related corporate plan success measures, corporate plan performance data and the corporate risks. An overall assessment is provided by the Chief Executive, which builds on the assessments on each objective provided by lead Directors and Heads of Service.
- 2.3 The charts below provide a summary of performance at Q2. The charts show that the vast majority of corporate plan steps, success measures and performance indicators are on track and corporate risks remain static.

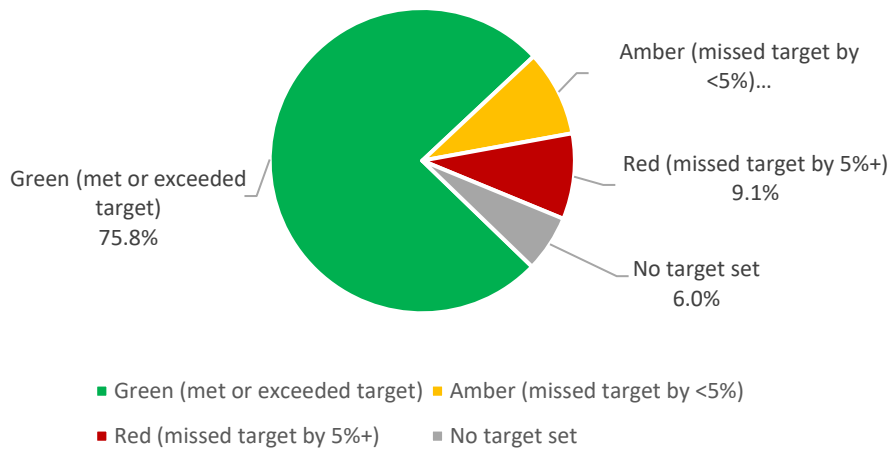




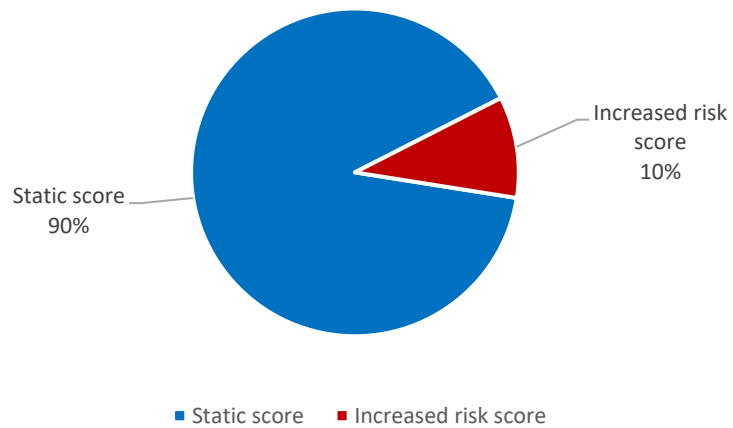
### Corporate Plan Success Measures 23/24



### Corporate Plan PI's



### Corporate Risks



2.3.1 The following includes some examples of good performance at Q2:

- In Social Services, a workforce development programme to increase capacity through improved recruitment and retention of Social Workers.
- Improved access to early help and the Councils well-being and prevention offer are helping to reduce demand on statutory social services.
- Improved access to support for carers and parents is in place. This includes training for staff and a new Carers Assessment has been co-produced with carers.
- The numbers of children needing to become looked after is on a gradual downward trend.
- The Inclusion Strategy 2023-28 for education was approved by Cabinet on 28 May. Steps are now being taken to deliver on the action plan which include, but are not limited to, the school attendance action plan, supporting sufficient specialist places, transformational programme, the review of EOTAS provision and the strengthening of the educational psychology offer to promote emotional health and well-being; although budgetary constraints are challenging.
- Worked in partnership with Penderyn Distillery to open a new whiskey distillery attraction at Landore.
- On-site works underway at the Palace Theatre and Albert Hall.
- Works commenced and progressing well to deliver new promenade improvements and developments, as well as new lighting around Swansea Bay.
- Engagement and co-production of the Tackling Poverty Strategy is ongoing. Received and administering Period Dignity in Communities and Direct Food Support Grants. A Food Holiday Fund was launched in August in response to the withdrawal of FSM Holiday Payments. Welfare Rights Advisors are delivering training courses to develop skills in diagnosing and solving benefit problems.
- Approximately 100 ULEV vehicles and supporting chargepoints introduced. Alternative fuel trial being scoped and fleet utilisation review commencing to understand fleet demand / need for potential efficiencies.
- The Councils updated Consultation and Engagement Strategy was approved by Council in May. The Council commissioned Coproduction Wales to work with us to improve our knowledge and capacity for undertaking more co-productive activity across the Council. A Coproduction champions network has been established and regular training opportunities have been provided to council staff. Pilot projects have been selected to put co-production into practice and work has begun on producing a Coproduction Policy for the Council.

2.3.2 The following includes some examples where continuing improvements are needed:

- Workforce sufficiency across all types of essential registrant posts in Social Services remains a limiting factor. The lack of registrant social workers and therapists is negatively impacting current performance and remains a

significant future risk. Likewise placement sufficiency for children who need to become looked after, but officers are responding positively and managing the risks appropriately.

- Swansea primary school attendance in 2022-23 year was 91.1%, up from 90.1% in 2021-22, but lower than 2018-19, when it was 94.7%. Attendance at the Pupil Referral Unit is currently unsatisfactory. Swansea secondary school attendance in academic year 2022-23 is 5.2% below that of 2018-19. This compares to a fall of 6.3% for Wales secondary schools overall. Swansea has the 4<sup>th</sup> smallest gap out of the 22 local authorities in Wales.
- The construction sector remains a challenging environment and a risk for the delivery and cost of major capital projects, with persistently high inflation continuing the impact the price of materials, supply chain and labour availability. Some major regeneration and housing developments are delayed owing to a number of factors and complications, but mitigation is underway where possible.
- We are continuing to provide temporary accommodation to any person that requires it under the legislation. Due to the increase in homeless presentations and the lack of move-on accommodation, we are seeing a high levels of households in temporary accommodation and these numbers are continuing to rise.
- Limited financial and human resources to deliver and push towards the Net Zero 2030 ambition. In the main we are relying on external funding and without large investment – particularly on our buildings and fleet, the emissions figure will no doubt begin to plateau. We will look at opportunities to secure funding, but this is challenging given the pressures in the Councils Medium Term Financial Plan.
- During the second quarter, work began on planning for the 2024-25 budget and the 2024-28 Medium Term Financial Plan. Financial sustainability over the medium term is an ongoing challenge in the face of a poor public finance outlook, combined with ongoing pay and inflationary pressures. In the meantime, work is ongoing to ensure the Council can present a balanced set of budget proposals in the spring of 2024, whatever the settlement outcome.

### **3.0 Integrated Assessment Implications**

3.1 The Council is subject to the Equality Act (Public Sector Equality Duty and the socio-economic duty), the Well-being of Future Generations (Wales) Act 2015 and the Welsh Language (Wales) Measure, and must in the exercise of their functions, have due regard to the need to:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Acts.
- Advance equality of opportunity between people who share a protected characteristic and those who do not.
- Foster good relations between people who share a protected characteristic and those who do not.
- Deliver better outcomes for those people who experience socio-economic disadvantage

- Consider opportunities for people to use the Welsh language
- Treat the Welsh language no less favourably than English.
- Ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs.

3.2 The Well-being of Future Generations (Wales) Act 2015 mandates that public bodies in Wales must carry out sustainable development. Sustainable development means the process of improving the economic, social, environmental, and cultural well-being of Wales by acting, in accordance with the sustainable development principle, aimed at achieving the 'well-being goals.

3.3 Our Integrated Impact Assessment (IIA) process ensures we have paid due regard to the above. It also considers other key issues and priorities, such as poverty and social exclusion, community cohesion, carers, the United Nations Convention on the Rights of the Child (UNCRC) and Welsh language.

3.4 This report is on performance during Q2 2023/24 in delivering the Council's key priorities as set out in the Corporate Plan, so there is no direct impact on people or communities.

#### **4.0 Financial Implications**

4.1 In the current and anticipated financial environment further discussion and consideration will be required around priorities and target setting for performance improvement.

#### **5.0 Legal Implications**







5.1 There are no legal implications associated with this report.

**Background Papers:** None.

#### **Appendices:**

Appendix A Q2 2023/24 Performance Monitoring Report  
 Appendix B IIA screening form

## Our Priorities

 Safeguarding people from harm	 Improving Education & Skills	 Transforming our Economy & Infrastructure	 Tackling Poverty and Enabling Communities
 Delivering on Nature Recovery & Climate Change	 Transformation & Financial Resilience		

## Chief Executive Update

September 2023

September 2023

The quarter 2 report shows demonstrable and positive progress across all of the Council's wellbeing objectives. This is not without its challenges including service and staffing pressures particularly in the safeguarding people from harm priority but officers are responding effectively and managing the risks appropriately. In overall terms of the 146 steps listed over 80% are currently green rated with 4 steps already completed which confirms that positive progress is being made. Only 4 steps across all objectives and currently red RAG rated and priority leads will be tasked with taking proactive action to try and bring these back on target. In addition whilst positive progress is reinforced by a number of the PIs included there are some where further work and analysis is needed to ensure overall performance targets are met by the end of the year. It needs to be stated that many of these PIs are newly created this year and may take a little time to bed down. The risks against each of the wellbeing objectives are clearly stated and generally are being mitigated as far as is possible minimising the residual risk although a rise in the risk score for the climate change objective will require further analysis. It is worth stating that the councils risk management framework and process is currently being reviewed and will be in place for the start of the new financial year. Finally whilst the risk analysis for the transformation and financial resilience shows some mitigations are effective in reducing the residual ratings there is still a concern on the overall risks largely due to the current challenges within wider public sector finances and uncertainty about likely budget settlement for future years. Overall I believe that positive progress is being made and I believe that the progress outlined within the report against the individual steps clearly shows that the council is using its resources effectively and this is evidenced by positive actions listed within the body of the report.

## Safeguarding People from Harm

### Why is this a Well-Being Objective?

Swansea is a fair and equal city in which children can have the best start in life to be the best they can be, safe within their families.  
Swansea is a healthy city in which all people can expect to live happy, healthy, fulfilling lives; to achieve their own wellbeing outcomes and age well.  
Swansea is a human rights city committed to enhancing the health, wellbeing, safety and to promoting the rights of vulnerable adults, children, and families.  
We aim to prevent and intervene early, where a person or child is at risk of harm, abuse, neglect or exploitation, and to ensure the right care and support at the right time.  
We will continue to promote safeguarding vulnerable people as everyone's business, across the council, through a skilled and professional workforce, our elected members and any organisation or person who undertakes work on our behalf.

### Challenges

Learning from the recent pandemic and looking forward with the help of the council's Recovery Plan will remain a key focus going into 2023 and beyond, as we carry on with transformation programmes to modernise social care services, to achieve a more preventative, sustainable approach and net zero carbon footprint.  
We are working in partnerships to improve the safety, the health, and the wellbeing outcomes of our most vulnerable citizens.  
Through 'coproduction' - we are involving people in everything we do, focusing on 'what matters most' to them as citizens, placing them at the centre of their own care and support and by coproducing services to achieve better outcomes.  
By ensuring there is high quality and more accessible, and integrated health and social care services for adults, children and families who need our care and support.  
Swansea is engaged in work on a regional strategic approach to support the wellbeing needs of carers and young carers, this needs to translate into a clear approach locally to make a difference in the lives of individuals.

### Director's Update

It remains a challenging period to both maintain safe and effective service delivery whilst seeking to prioritise the transformation and improvement activity that will enable continued delivery against the Council's safeguarding well being objective.  
The challenges are well rehearsed.  
Workforce sufficiency across all types of essential registrant posts remains a limiting factor. The lack of registrant social workers and therapists is negatively impacting current performance and remains a significant future risk. Likewise placement sufficiency for children who need to become looked after.  
Entrenched high rates of inflation have led to in year overspends and compound the risk of a significant gap between available levels of public funding and the likely cost of services in the medium term. Again this poses a significant risk to the Council's ability to maintain current levels of performance and threatens both the sustainability of existing models of care and will be an additional hurdle in the development of intended new models.  
Given such a challenging context, it remains a remarkable achievement that performance against most of our key performance targets is strong.  
The numbers of children accessing both early help and statutory children services is broadly in line with expectations. The number of children needing to become looked after remains on a gradual downward trend. The numbers of children subject to a child protection plan is within an expected range. The only area of significant concern is the number of children requiring a residential care placement. That number is too high and is a direct consequence of a national lack of foster placements.  
The numbers of adults accessing care and support has returned to pre covid levels but presenting acuity of need has increased and this is severely testing service resilience.  
The establishment of a timely and robust early help approach to avoid adult's needs escalating is less mature across health and social care. Where elements of that approach are in place, they are performing well. Building on those pockets of strength remain a key priority both in terms of future financial sustainability and delivery against the Council's well being priority.

## Supporting Objectives

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Safeguarding as Everyone's business - Safeguarding our most vulnerable people is 'everyone's business' across the Council, within schools, with partners, and through West Glamorgan Safeguarding Board and partnerships, we will undertake a review of post-pandemic care and support provision	Sep 23 An Internal and external domiciliary care capacity review, including the development of an Assistive Technology Strategy and internal Residential care provision review, aims to increase domiciliary care capacity. A Workforce development programme likewise aims to increase capacity through improved recruitment & retention of social workers. Locality based prevention and early intervention and support for parents and carers is aimed at improving early help and reduce statutory demand.	Green
High quality and resilient statutory services - by ensuring that Adult and Child and Family Services are robust, resilient, and effective in getting right care and support, to the right person, at the right time. We commit to investing £750 million for better care in Swansea, to begin options appraisal to increase council direct delivery of care.	Sep 23 A Medium Term Financial Plan has been approved and planning is in place for budget requirements over the next 5 years.	Green
Improving outcomes for children and young people by promoting rights of children, young people in everything we do, through our strategy to support children and young people to live safely at home with their family; through the corporate parenting strategy to help each cared for child achieve a better life; We will strive to provide new children's care facilities within Swansea; by progressing a new children's care facility offering high quality, not for profit, local placements when most needed.	Sep 23 Work has commenced and we have purchased 1 home for development and transformation. Recruitment and development of staff is underway. Work in ongoing to source a second property and to secure further regional funding for extra developments in this area. We are continuing to work with Welsh Government on legislative changes to support the elimination of profit from the care sector and understand the detail of what this will mean to the sector, provision and placements.	Green
Transforming Care and Support to vulnerable adults - Supporting our most vulnerable adults to remain safe and independent at home, by remodelling access to an integrated health and social care service. We will rebalance our service offer to provide better day care opportunities and respite services across the City; to focus on prevention, reablement, and by engaging with Health to ensure care plans align with health recovery to improve outcomes	Sep 23 A strategy on seeking to provide better day care opportunities and respite services across the City is in development and a review of existing revision underway. This is linked to capital programme and an FPR7 is in place to look at redesign of services, thinking about an integrated hub approach.	Green
Support to unpaid carers, parent carers and young carers - recognising the vital contribution of unpaid carers, parent-carers and young carers by coproducing new approaches to the right support to achieve their own well-being outcomes.	Sep 23 Coproducing improved offers and range of support available to carers parent-carers and young carers, both locally and regionally	Green
Building a skilled, professional workforce and supporting their wellbeing - by safe recruitment, and retaining a workforce that continues to deliver high quality social services, by committing to fairer pay for care workers; through supportive leadership; by focusing on workforce wellbeing, practice standards and professional development to support each worker to be the best they can be	Sep 23 A Workforce development programme likewise aims to increase capacity through improved recruitment & retention of social workers. The significant increase in cost of living has impacted upon Real Living Wage rates for 23/24. A fees paper was produced as part of budget setting & agreed for 23/24. Work has begun to understand the impact of this on 24/25.	Green

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Implement the West Glamorgan regional partnership work programme, by working with partners to achieve integrated sustainable, and zero net carbon model of health and social care.	<p>Sep 23</p> <p>Transformation priorities have been aligned with regional transformation agenda and/or support shared objectives with partners across the region. Specific programmes have been developed (1) Communities and Older People (2) Carers (3) Wellbeing &amp; Learning Disability (4) Emotional Wellbeing and Mental Health (5) Children and Young People (6) Neurodiverse along with a number of Supporting (Enabling) Programmes for example Complex Care Commisisoning, Workforce, Digital and Data</p>	Green



## Success Measures

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Safeguarding remains a whole council priority and everyone's business.	Sep 23 Jointly chaired by Cabinet Member and Director of Social Services, Council wide group meets regularly to oversee a comprehensive work programme, implement policy and Swansea's 'everybody's business' approach to Corporate Safeguarding. Annual report to be presented to Scrutiny Programme Committee in November.	Green
Improved access to early help and the Council's wellbeing and prevention offer are helping to reduce demand on statutory services.	Sep 23 Improved access to early help and the Council's wellbeing and prevention offer are helping to reduce demand on statutory services.	Green
Safety and safe standards inform our practice.	Sep 23 Safeguarding Checklist, based on National Minimum Standards, developed for all staff & volunteers	Green
Focus on quality in the delivery of statutory social services.	Sep 23 Continued focus on embedding quality assurance within Adult Services and Child and Family Services and through evidence-based practice frameworks e.g. signs of safety, collaborative communication	Green
Workers feel supported in their work and professional development.	Sep 23 Workforce development and workforce wellbeing programmes in place.	Green
Carers are identified and supported in their own wellbeing.	Sep 23 Improving access to support for carers and parents is in place. This includes training for staff and a new Carers Assessment has been co-produced with Carers.	Green
Swansea citizens experience a seamless journey towards their own health and wellbeing outcomes.	Sep 23 Progress of integrated, reablement pathways and hospital to home support, and reported in local and regional performance reports	Green

## Performance Indicators

Measure Ref ↑	Measure	Target	Actual	Performance
AD011e	The percentage of residential reablement stays where the need for support was mitigated or reduced	60.0%	69.6%	★
AD011f	Percentage of community reablement packages of care where need for support was mitigated or reduced	60.0%	62.4%	★
AD017I	Percentage of Care and Support plans due to be reviewed completed within statutory timescales	60.0%	57.4%	●
AD024I	Percentage of enquiries completed within 7 working days from receipt of the reported alleged abuse.	70.0%	87.0%	★
AS13b	Percentage of identified carers offered an assessment at the point of assessment of the 'cared for'	90.0%	90.6%	★
CFS14a	Percentage of contacts received where a decision was made by the end of the next working day	90.00%	95.63%	★
CFS18a	The rate of looked after children (LAC) per 10,000 of the 0-17 Swansea population	105.0	103.6	★
CFS19a	The percentage of visits to children on the CPR which were not overdue.	90.00%	74.42%	▲
CFS24	Number of Children / Young People Supported by Child and Family Services at the end of the period	1,100	1,214	▲
CFS25i	The number of Children / Young People supported by the Early Help Hubs at the end of the period	1,000	1,029	★
CH026	The number of children on the Local Authority's Child Protection Register (CPR) at end of the period	220	198	★

## Corporate Risk for the Safeguarding Priority

Risk Title	Risk Description	Inherent Risk	Overall RAG 30.06.	Overall RAG 30.09.
Safeguarding	If our safeguarding arrangements are not sufficiently robust (particularly with regards being able to fund, recruit and retain sufficient qualified social workers; ensure placement sufficiency for looked after children and be able to provide or commission sufficient social care for adults with assessed care and support needs), then we will not be doing everything we possibly can to prevent the death, injury or neglect of a child or vulnerable adult and consequential reputational damage.	<b>25</b>	<b>16</b>	<b>16</b>

## Improving Education and Skills

### Why is this a Well-Being Objective?

We want all children and young people to attend school regularly, to be included, to be resilient and have successful futures.  
We want all children and young people to have good Welsh language skills.  
We want to support and maintain effective school leadership.  
We want to support and maintain excellent teaching.  
We want all learners to receive their education in environments that are safe and sustainable communities for learning.

### Challenges

We want all children and young people to attend school regularly, to be included, to be resilient and have successful futures.  
We want all children and young people to have good Welsh language skills.  
We want to support and maintain effective school leadership.  
We want to support and maintain excellent teaching.  
We want all learners to receive their education in environments that are safe and sustainable communities for learning.

### Director's Update

Performance has been steady, overall. In primary schools, there are no recent national statistics for attendance (delayed for 2022-2023 by action short of strike action). However, Swansea primary school attendance in 2022-2023 year was 91.1%, up from 90.1% in 2021-2022, but lower than 2018-2019, when it was 94.7%. Attendance at the pupil referral unit is currently unsatisfactory. Swansea secondary school attendance in academic year 2022-2023 is 5.2% below that of 2018-2019. This compares to a fall of 6.3% for Wales secondary schools overall. Swansea has the 4th smallest gap out of the 22 Welsh LAs.

The overall percentage of young people not in education, employment or training (NEET) at 1.9% is below 2% and compares favourably with national percentage for NEET. National outturn for 2022 year 11 leavers was 2.1% whilst Swansea was 1.9% (joint 9th position out of 22 LAs).

Securing re-design of specialist teaching facilities has progressed well with plans for a first phase implementation, on track. However, early years referral figures indicate that plans are no longer cost neutral, and that funding is required to meet the rising number of additional learning needs in the 0-3 age range and beyond. A comprehensive and collaborative pre-consultation engagement period with Pupil Referral Unit (PRU) to re-model service delivery has progressed well during the reporting period with planning in place to meet a wider range of presenting needs for learners who may benefit from Education Other than at School (EOTAS).

Actions to improve Welsh in Education are progressing well with a higher number of schools receiving accreditation for their work in developing I Welsh skills inside and outside the classroom. Actions have resulted in three schools achieving the Gold Siarter Iaith award.

Schools appreciate the support for leadership where resources and guidance is shared efficiently. However, during this reporting period, a national dispute on primary school leaders' workload issues has impacted negatively on the normal opportunities to engage with school leaders and to visit schools for monitoring and evaluation activity. A local professional development offer to support school self-evaluation has received positive feedback. Actions have resulted in more effective improvement planning at school level. Suitable collaboration to support learner voice and choice has resulted in clear feedback that over 90% of post-16 learners are satisfied with their curriculum choices. Support for schools to maximise their curriculum choices, including vocational provision has resulted in meaningful discussions to offer collaborative online delivery for a few subjects that individual providers find difficult to deliver on their own.

The integrated school improvement service Partneriaeth, responsible for supporting professional learning for teachers and development for leaders has an 88% satisfaction rate overall with service users reporting useful training recently. The current development and recruitment of school leaders in Swansea indicates strong candidate fields in a majority of schools.

The successful rollout for provision of universal free school meals has resulted in thousands more learners accessing free food in school. However, the average uptake across all schools is currently 65%. Strong progress during this reporting period indicates further roll out in primary schools is on track for delivery in quarter four.

Detailed preparatory work for setting out the next ten-year phase of capital schemes for the school estate has progressed well in order to present a thorough strategic plan in the final quarter. Approval to consult on the amalgamation in 2025 and build of a new single site special school by 2028 was secured during this reporting period. The capital investment to fully deliver schemes within Band B has also been outlined carefully and secured via Cabinet.

## Supporting Objectives

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Inclusion Strategy - We will deliver the inclusion strategy to embed universal provision for additional needs, specialist places for additional needs and a whole school approach to emotional health and psychological wellbeing. The strategy will promote attendance, inclusion, learner participation in decision making and reduction in peer-on-peer bullying and harassment in schools.	Sep 23 The Inclusion Strategy 2023-2028 was approved by Cabinet on 18 May 2023. Steps are now being taken to deliver against the action plan which include, but are not limited to, the school attendance action plan, supporting sufficient specialist places transformational programme, the review of EOTAS provision and the strengthening of the educational psychology offer to promote emotional health and wellbeing. Budgetary constraints are challenging.	Green
Welsh Language Skills Strategy - We will deliver a strategy that embeds the Siarter Iaith to all schools. The strategy will ensure that all schools are supported to develop learners' skills within and outside the classroom. We want learners to speak Welsh with confidence when they leave school.	Sep 23 The Welsh in Education Strategic Plan 2022-2032 is in place and a five-year delivery plan has been developed and submitted to Welsh Government. The delivery plan has been updated in line with progress, new opportunities and feedback from Welsh Government. The Welsh in Education team continue to support schools on their Siarter Iaith journey, with a number of schools achieving Bronze, Silver and Gold status this academic year.	Green
Leadership Support Strategy - We will deliver a strategy to maintain and support effective leadership, including governance, across all schools. The strategy will promote self-improvement and collaboration. We want our school leaders to improve their own wellbeing in order to support practitioners and learners well.	Sep 23 A range of mechanisms are in place to support new and experienced leaders at all levels. This work was detailed to the Education & Skills Corporate Delivery Committee (CDC) in 2023. A new leadership handbook has been developed and shared with all schools and was subsequently shared with Cabinet as part of the CDC summary report in July. School improvement team (SIT) has developed and delivered a series of self-evaluation/improvement planning sessions to support effective school improvement. Excellent feedback has been received. Impact to be measured following conclusion of Autumn visits.	Green
Teaching Support Strategy - We will deliver a strategy to support literacy, numeracy, and digital competence to maintain, restore and accelerate learners' skills. The strategy will promote excellence across all schools. We want all teachers to equip learners with key skills to access all areas of learning.	Sep 23 Work continues against the action plans developed against successful audits for Languages, Literacy and Communication and Mathematics and Numeracy in schools. A new Digital Strategy has been approved to continue the work of developing digital competence of all learners. Partneriaeth are commissioned to provide professional learning around improving teaching and learning (Principal School Improvement Adviser SIA instrumental in design), which was piloted and co-designed by a group of Swansea schools to ensure relevance.	Green

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Designing Destinations Strategy - We will deliver a strategy to support vocational learning, post-16 curriculum collaboration, careers and work-related education. We want schools to engage with community learning champions, employers and other education providers to inspire successful futures for learners.	Sep 23 New post-16 and vocational strategies have been developed. A sixth form learner voice survey has been undertaken with smaller focus groups around post-16 provision. Analysis has been completed to inform next steps. A range of work is taking place within the post-16 strategy to inform future provision, support transition and develop future employability skills. Partneriaeth Sgiliau Abertawe meet to consider strategically the future skills requirements of the area.	Green
Equity in Education Strategy - We will deliver a strategy to embed trauma informed practice across all schools, actions to reduce the impact of poverty on learners and meet our responsibilities as corporate parents. We want our vulnerable learners to access support in one place through community focussed schools.	Sep 23 Trauma informed practices, mental health and other training has been provided to schools. A conference covering poverty was delivered to all headteachers in June. Topics included services able to support families facing poverty, period dignity, professional learning, community focused schools, universal free school meals and uniform grants. A new system has been developed to include an e-personal education plan for Looked After Children, to support and monitor their educational progress.	Amber
New and Better Schools Strategy - We want to provide an efficient and effective educational infrastructure to meet current and future demands for school places. We will deliver a transformed schools' estate using our school building and maintenance programme and also respond to the developments set out within the local development plan (LDP) while ensuring community benefits from contracts. We want to reduce our carbon footprint within the school estate and make assets available for community use where local demand exists.	Sep 23 A shortlist of schemes for the Strategic Outline Programme for Sustainable Communities for Learning has been produced following workshops with officers, Corporate Management Team (CMT) and Cabinet. Cabinet has approved the commencement of consultation on a larger new-build special school.	Green

## Success Measures

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Developed and promoted the new inclusion strategy.	Sep 23 The supporting sufficient specialist places worksteam was reported to the the STC on 27 September 2023. There has been agreement to proceed with a restructure of the Additional Learning Needs and Inclusion Team to allow for a strengthened focus on Educational Psychology.	Green
Continued to support schools to support learners develop Welsh language skills, in line with the WESP delivery plan.	Sep 23 Schools are supported with Welsh language provision in line with the WESP. A number of schools have achieved awards in their Siarter Iaith journey. Funding has been secured through Partneriaeth to support this work with two seconded officers now supporting our work in this area.	Green
Encouraged take-up and support for school staff to undertake leadership development opportunities including qualifications.	Sep 23 Leadership development opportunities are promoted across schools and the number undertaking specific qualifications is reported within the KPIs. Leadership development opportunities are promoted across schools and the number undertaking specific qualifications is reported within the KPIs. The national middle leadership development programme and senior leadership development programme has very good representation from Swansea historically. Applications are currently open for 2023/2024. SIT support the delivery of these programmes. Any further requirements are factored into SIT's bespoke offer.	Green
Promoted a new vision for school governance to support school leadership.	Sep 23 Cabinet approved the strategy and the work plan to deliver the strategy in July 2023. The Arweinwyr platform was successfully rolled out to clerks by the end of the academic year and the transition of governor email accounts to Hwb mail commenced. Progress to promote support for school leaders in Swansea is strong.	Green
Promoted local and regional opportunities of professional learning to support excellent teaching and learning.	Sep 23 Local and regional opportunities for professional learning are shared widely with schools through the School Improvement Team, networks and newsletter.	Green
Consulted with learners on post-16 choices and developed a new post-16 and vocational strategy.	Sep 23 Post-16 and vocational strategies developed. Post-16 provision survey is now complete and report available. This is being used to inform discussions with schools and college regarding the feasibility of some collaborative provision.	Green

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Ensured suitable facilities to deliver universal free school meals to reception age, in line with the Welsh Government offer.	Sep 23 All reception age pupils have been offered universal free school meals.	Blue
Submitted a strategic outline programme for sustainable communities for learning.	Sep 23 Planning, identification and prioritisation to develop the strategic outline programme is underway.	Green



## Performance Indicators

Measure Ref ↑	Measure	Target	Actual	Performance
EDCP18d	Young people known to be NOT in Education, Employment and Training (EET)	Annual PI - data to be reported at end of year		
EDCP42	Percentage of pupil attendance in the Pupil Referral Unit	59.00%	52.19%	▲
EDCP43	Percentage of pupil attendance in special schools	88.00%	84.58%	●
EDCP44	Percentage take-up of Universal Free School Meals	Annual PI - data to be reported at end of year		
EDU016a	Percentage of pupil attendance in primary schools	91.00%	91.17%	★
EDU016b	Percentage of pupil attendance in secondary schools	88.00%	87.79%	●
EDW001	Number of learners assessed for Year 11 qualifications through the medium of Welsh	Annual PI - data to be reported at end of year		
EDW002	Percentage of learners educated through the medium of Welsh at Nursery and Reception Ages	Annual PI - data to be reported at end of year		

## Corporate Risk for the Improving Education and Skills Priority

Risk Title	Risk Description	Inherent Risk	Overall RAG 30.06.	Overall RAG 30.09.
Pupil attainment and achievement	If pupils do not receive a very good education then they will not achieve the right qualifications and skills to take advantage of the Swansea Bay City Deal and contribute effectively to the economic prosperity of the city.	16	NO RAG	9

## Why is this a Well-Being Objective?

We want to raise economic performance to create wealth and employment opportunities to improve the economic well-being of Swansea's citizens.  
We want to lever all investment and funding opportunities in realising this objective including UK Government City Deal, Levelling up and Shared Prosperity Fund, Welsh Government Transforming Towns, Economy and Creative Wales and other major funders.  
We want to ensure our local economies are supported to achieve resilience in the face of future global, national, and regional challenges, in particular the city centre and our small independent businesses and organisations that are the fabric of our communities large and small.  
We want to provide an enabling approach to support individuals, businesses and communities through our employment and business support, regeneration activities, cultural assets, transport connectivity, planning and other support and regulatory frameworks in delivering these practical measures.  
We want to ensure Swansea is a place characterised by sustainable communities with sufficient good quality housing and places for work and leisure.  
We want to continue to forge strong, hard-working networks with our external partners who are co-delivering with the Council.  
We want to take advantage of untapped growth potential to generate sustainable energy, deliver on net zero commitments, protect the environment and boost the economy.

## Challenges

Post-Covid support and recovery.  
A digital and connected future and new models of working.  
Ongoing productivity gap with rest of UK - Swansea's productivity (GVA per hour worked) stood at 85.9% of the UK average in 2020.  
Swansea has a healthy level of new business formations but the relative size of the business base (508 businesses per 10,000 population) is below Wales (539) and UK (718) averages. One and five year survival rates for enterprises have improved and in 2020 were in line with the equivalent rates for Wales and UK, but the increasing costs of goods and services, particularly energy costs, and rising interest rates are creating very challenging trading conditions for local businesses.  
A new future for both the City Centre and smaller district and local centres and adapting to new ways of working including transport methods and connectivity and positive impact on places. .  
Ongoing issue of unemployment and inactivity and ensuring a supply of genuine pathways and opportunities. Economic activity and employment rates in Swansea are lower than Wales averages and further below equivalent UK rates.  
The Household Income Gap - although Gross Disposable Household Income rose in Swansea by 8.5% between 2014 and 2019, it continued to lag behind Wales and the UK where rises were 12.3% and 15.8% respectively over the same period. In 2019 Gross Disposable Household Income in Swansea was 75.9% of the UK average.  
Wage rate gap - Over the year to April 2021, annual median full-time earnings in Swansea (workplace based) rose by 5.2%, which was greater than the Wales (+1.2%) and UK (-0.6%) averages. Consequently, annual median full time wage rates in Swansea stood at 91.6% of the UK average in April 2021.  
Contribute to a reduction in deprivation, through the creation of sustainable well paid employment. There are pockets of deprivation across the county, with a number of areas among the highest levels of deprivation in Wales. In the 2019 Welsh Index of Multiple Deprivation (WIMD), Swansea had an above average proportion of its Lower Super Output Areas (LSOAs) featuring in the most deprived 10% in Wales, with 17 (11.5%) of its 148 LSOAs in the 191 (10%) most deprived.  
Change the current business sectoral mix towards higher skilled, higher paid employment. 87.3% of employment is currently service sector based, and there is an under-representation of businesses in professional, scientific and technical sectors which tend to have better skilled and higher paid roles.  
Swansea has a higher proportion of retail businesses than the Welsh and UK average – the planned regeneration schemes will help diversify the city and district centres.  
Resident skills - continue to upskill people to take advantage of opportunities in new and emerging industries.  
Address skills gaps in sectors such as care, hospitality and construction.  
Recognising and working with deep seated anti-social behaviour, crime and associated issues and providing real alternatives and support.  
Enabling creation of sustainable energy sources.  
Help reduce commercial property viability gap with provision of quality flexible adaptable office space in response to increasing levels of inward investment interest and local independent business growth in both town centres and modern industrial settings  
Increase the supply of affordable housing by building and acquiring new homes and looking for innovative solutions to convert existing buildings into residential accommodation.  
Following completion of the WHQS, continue to invest to improve the energy efficiency of existing homes and reduce the impact of fuel poverty for residents.

Transforming our Economy & Infrastructure

September 2023

The Q2 performance in meeting this well-being objective is overwhelmingly positive. Over 80% of the steps involved are on target, some have now been completed, demonstrating that the Council is utilising its resources effectively, including staff, assets and budgets. The performance indicators tell a similar story, with the majority of PIs achieving the targets. Of particular note is the planning service performance, which is top quartile when benchmarked at the all-Wales level. An exception is the number of contracts started with community benefit clauses included, which have failed to meet the target, although this is expected to improve throughout the year. The construction sector remains a challenging environment and a risk for the delivery and cost of major capital projects, with persistently high inflation continuing to impact the price of materials, supply chain and labour availability. Some major regeneration and housing developments are delayed owing to a number of factors and complications, but mitigation is underway where possible.

## Supporting Objectives

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Transform our economy by securing funding opportunities and continuing to collaborate with our local regeneration partners and networks to implement the economic regeneration plan. We will maximise the benefits through the creation of employment and training opportunities for the long-term unemployed and economically inactive via community benefit clauses in contracts. There will also be a focus on -		
Lead implementation of South West Wales Regional Economic Delivery Plan in Swansea and associated work packages and funding streams such as UK Shared Prosperity Fund and Welsh Government sources.	Sep 23 REDP delivery underway.	Green
Continuing support to business (both start up and existing) through the Business Swansea provision	Sep 23 Provision in place and support for business sector is ongoing.	Green
Public Health Teams ensuring businesses can run effectively by adhering to the relevant legislation be it in the hospitality and catering sector or the licensed taxi sector.	Sep 23 Taxi licencing officers carry out regular checks of licenced drivers and their vehicles to ensure compliance and take action where required. there is a risk rated programme of inspections of food businesses to monitor compliance with food hygiene and food standards regulations. officers carry out checks to licenced premises to ensure that they are working within the conditions set out in their licence with enforcement action taken if they are not.	Amber
Help create thousands of new jobs for the people of Swansea, aiming to provide high quality and secure employment.	Sep 23 New range of business grants created using UK Shared Prosperity Fund, now active and rolling programme.	Green
Deliver an events programme each year, for the next five years, which expands and grows in tune with the regeneration of the city and growing visitor economy	Sep 23 The Event programme continues to grow from strength to strength. With the first quarter of the year hosting: A Street Food Festival, Circus skills workshop – helping develop skills within the sector. Swansea Pride, Swansea Jazz Festival. Busy lettings programme including – Swansea Triathlon, Swansea Half Marathon, beach Rugby, Outdoor Cinema, Crazy Karts, UK Rocket Tour A series of major Major Events: Wales Airshow. Ironman 70.3. (Entries for year 3 will open shortly).World Para Triathlon Championships. Singleton Park Concerts – Tom Grennan, Madness & Ministry of Sound.	Green
Deliver a range of new and exciting immersive attractions, summer concerts and a new phase of Arena shows; encapsulated in a larger ever growing events programme (including the half Iron Man event), which commenced with community support for Platinum Jubilee events.	Sep 23 5 summer concerts held within Singleton Park across 2 weekends. Work in progress to secure promoters for 2024. Events team continue to develop the Arena digital skin and are in regular contact with ATG the arena operators. Ironman 2023 delivered successfully with 2000 competitors. Entries now open for the 2024 Swansea 70.3	Green

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Retain the Wales National Air Show in Swansea, bringing tens of thousands of visitors to the City for this annual event and review how its delivery can align with its net zero carbon targets.	Sep 23 Wales Airshow successfully delivered. Attracting over 200,000 visitors. Sustainability credentials under continuous development. Event developments this year included new displays in St Helens Ground and a motor zone.	Blue
Secure a major new tenant for the Debenhams unit in the Quadrant Shopping Centre, securing the use of this unit for the future.	Sep 23 In principle offer accepted. Acquisition completed. Marketing proposals and Prospective tenant discussions underway.	Green
Continue to work with partners to build a strong and resilient Creative Network to support the existing, emerging and future fabric of cultural and leisure assets embedded across the City Centre and District and local centres.	Sep 23 Funding secured, dialogue with local providers and partners underway for contract terms; job specification for a coordinator, funded by SPF is with HR for advertising.	Green
Transform the city and county's infrastructure to support a strong and resilient economy by focussing on key developments and enhancing key assets	.	
Working with our regional partners, progress a £1 billion regeneration and £750 million strategic partnership with Urban Splash as our new strategic partner, with an initial focus on Copr Bay Phase 2, the Civic Centre site and St Thomas site.	Sep 23 Progress of phase 1 individual projects underway subject to capital funding availability.	Green
Progress the Palace Theatre and Albert Hall developments to secure our historic buildings for future generations and seek an innovative solution to secure the future of the Elysium building.	Sep 23 On site works underway at Palace and Albert Hall.	Green
Work with partners to develop commercial meanwhile uses.	Sep 23 Progress underway via Regeneration Swansea Partnership. New Meanwhile space contract being issued via UK SPF.	Green
Progress work on the new Castle Square Gardens project.	Sep 23 Our regeneration programme delivery is underway, utilising all available funding opportunities, and private sector investment, to bring about mixed-use regeneration projects that fit with the Council's existing policy framework.	Green
Progress work on the new city centre Community Hub project providing a new home to the Central Library.	Sep 23 RIBA stage 4 of conversion of the former BHS/What store completed and signed off; funding for project agreed at Cabinet and Welsh Gov. LOI in place until 16th of Oct with Kier and demolition works started on site 11th Sept. Contract documents being prepared by legal to be issued by 16th of Oct.	Green
Complete the phased demolition of Ty Dewi Sant and the old multi-storey car park.	Sep 23 Ty Dewi Sant demolished. BGCL have entered administration, Wilmott Dixon appointed as replacement with will include MSCP demolition.	Green
Progress the build of 71-72 The Kingsway, to create an innovation hub which will be home to new businesses and up to six hundred new jobs.	Sep 23 Construction underway.	Green

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Continue to progress development and investment through the Skyline park attraction on Kilvey Hill.	Sep 23 Skyline obtaining legal review but have approved the project subject to funding offers. Cabinet have approved grant funding support. PAC complete. Planning application anticipated once legal review completed.	Amber
Progress hotels discussions for the City.	Sep 23 Alternative options being considered following withdrawal of original hotel operator.	Amber
Working in partnership with Penderyn Distillery, support the opening of a new whisky distillery attraction at Landore.	Sep 23 Project complete.	Blue
Progress the development and reopening of the River Tawe corridor, including new pontoons.	Sep 23 Project delivery underway. Pontoon 1 installation taking place October 2023, on schedule.	Green
Deliver new promenade improvements and developments, as well as new lighting around Swansea Bay.	Sep 23 Works commenced in January and have progressed well. Regular engagements sessions are held at the community centre. Appointments have been secured through the Bricks and Mortar initiative. The completed scheme will include new bollard and festoon lighting. Second phase of bollard installation commenced.	Green
Commit to improving public toilets.	Sep 23 Strategy stakeholders reviewed; Action plan under review; Grant accepted to refurbish Rhossili Toilets.	Green
Progress discussions for the new interactive aquarium, aiming to offer an immersive experience for visitors and a wider educational resource.	Sep 23 Discussions underway via Urban Splash.	Green
Strive to progress discussions regarding a new ferry service linking Wales with the South West of England.	Sep 23 Discussions underway.	Amber
Commit to progress discussions with partners regarding the International Sports Science Village.	Sep 23 Feasibility and options appraisal completed and subject to final review will be shared internally with a meeting with Partner (SU prior to Dec). Outcome seeks future options for delivery and governance jointly commissioned for consideration by partners. Market test completed, with strong response and likely competitive market if tendered Currently agreeing a formal extension period in relation to WNP to 31/03/24 in first instance to allow time for all options to be considered.	Green
Commit to investment in our towns and villages.	Sep 23 Transforming Towns and ERF delivery underway. Plus Transforming County project created via UK SPF to create county-wide grant opportunities for this theme.	Green

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Deliver on the refurbishment and upgrade of remaining tower blocks	Sep 23 Contractor appointed for Croft St and progressing at detailed design stages . It is anticipated all preconstruction design and second stage procurement will be completed by September 2024 and project delivery completed as per delivery timeframe stated.	Green
Provide more energy efficient homes and more affordable homes, alongside more investment in social housing.	Sep 23 New build schemes progressing at various stages of design, procurement and site delivery to maximise spend of capital budget. Grant opportunities being maximised through use of TACP and LBDF , in addition to SHG. More Homes budget review underway in conjunction with wider HRA budget review to determine future resources available. 10 year delivery programme in development pending outcome of HRA budget review. Review of Swansea Standard underway. Applications submitted for HAPS City Deal Financial Incentive fund to supplement HRA budget.	Amber
Public Health Teams ensuring private rented properties and Homes in Multiple Occupation are safe for tenants and rogue traders are prosecuted.	Sep 23 The Private Sector Housing Team handle HMO applications in line with regulations, respond to enquiries and complaints about housing standards and contract issues, taking enforcement where necessary. Inspections are 'delayed' due to backlog created by Covid and limited staff resources. All rogue traders incidents are investigated by the Trading Standards Team and on track. If sufficient information then investigation is undertaken and appropriate enforcement action taken.	Amber
Complete the Welsh Quality Housing Standard (WQHS) 1 and begin planning WQHS 2.	Sep 23 "WHQS Phase 1 completed in December 2021 with a total investment of £546m. 4 Year programme for WHQS2023 approved by Council. Capital programme for 2023/24 £37m and further £140m investment upto 2027/28 to maintain the standard and develop programmes for WHQS2023. SAVA software procured to assist with the new energy pathways required for WHQS 2023.	Amber

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Continue onto the next phase of the More Homes build, whilst maintaining progress on further retrofitting of council homes.	Sep 23 Schemes in development due to start 24/25 include: Creswell road - 9 units Brondeg House - 13 Units Heol Dynys - 22 units Milford A&B - 40 units (approx). tender for development partner targeted for issue Jan 24. Brokesby Road 160 units- planning application submitted - construction delivery date tba pending HRA budget review. Aquisition programme - 23/24 budget £3m fully allocated for 28 units as at Oct 23. Additional funding from s106 commuted sums pot to be added to extend programme to year end. 4 yr HRA capital programme include decarb work to the existing stock as part of WHQS 2023 but longer term programme over 10 years & funding yet to be determined. Additional grant funding obtained from WG Optimised Retrofit Programme of £3m to support decarbonisation measures in HRA capital programme.	Amber
Promote and enhance a diverse and sustainable local economy through ensuring a robust policy framework		
Progress the Replacement Swansea Local Development Plan to provide an up to date planning and place making framework for guiding decisions on development proposals	Sep 23 Delivery Agreement approved by Council and Welsh Government and work underway. First key stage - a call for Candidate Sites - has commenced alongside project work to formulate key underpinning evidence.	Green
Agree a new Swansea Bay Strategy.	Sep 23 Progressing delivery programme via the Economy and Infrastructure STC and dedicated workshops, focus likely to be on Llangland for 23-24. A report is being developed to be heard at E&I STC in November 2023. Swansea Bay Delivery Plan forms an agenda item within the City Regeneration Programme Board.	Green
To remodel services, focusing on meeting people's needs, within the funding available	Sep 23 Minor restructures within the Planning Applications service and the Natural Environment service are scheduled for implementation in 2023/24 and 24/25 respectively. These restructures will improve cost efficiency and service delivery resilience.	Green
Commence a review of the disabled parking bay policy.	Sep 23 Draft proposal presented to Cabinet and Chairs for discussion on proposed policy. Formal report to be presented.	Green
Progress TAN15 discussions with Welsh Government to find a solution that supports appropriate development.	Sep 23 Consultation response provided to inform WG drafting of final document. Continuing liaison with WG, including through WLGA, and awaiting final version expected end of 2023/early 2024.	Green
Investment in our communities to provide good community infrastructure	.	



Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Promote sustainable use of sports pitches for local sports clubs.	Sep 23 Good working relationship with junior and senior leagues in Swansea to look at best and most sustainable use of grass pitches and 3Gs operated by our partners. Strong linkages with FAW and other Gov bodies to drive new investment, as well as further Cats being progressed in Q2 and an investment programme across main centres moving forward with tender process for changing rooms at Mynydd Newydd.	Green
Continue to invest in parks and play areas.	Sep 23 Programme of activity for 23-24 continues via a framework. Tranche 2 awarded, Tranche 3 out to tender. Jersey Park funding re-evaluated and included in T3.	Green
Progress roll-out of free public Wi-Fi.	Sep 23 Contract has been awarded and provision of Wi-Fi to four District Centres is anticipated for this financial year.	Green
Commit to complete play area upgrades.	Sep 23 Programme of activity for 23-24 continues via a framework. Tranche 2 awarded, Tranche 3 out to tender. Jersey Park funding re-evaluated and included in T3.	Green
Continue the replacement of bus shelter installations.	Sep 23 19 shelters in first batch of ERF funds - all completed. 18 shelters in second batch or EFR funds - 6 installed to date.	Green
Commit to installing new bins and to replace dog waste bins with larger general bins.	Sep 23 Bin replacements proceeding well, with most wards having received first round of priority replacements. Procurement complete for purchase of next supply of bins.	Green

## Success Measures

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Delivered better skate facilities.	Sep 23 Mumbles skate park now open and well used; further finance secured for wider strategy and procurement for consultancy support due for appointment Oct 23.	Green
Commenced £10 million local road upgrades.	Sep 23 Programme developed and works to be delivered over coming months.	Green
Promoted the free and sustainable use of sports pitches for local sports clubs.	Sep 23 Complete.	Blue
Secured a tenant for Debenhams.	Sep 23 Marketing details prepared and discussions with prospective tenants taking place.	Amber
Work progressed on the new Castle Square Gardens project.	Sep 23 Contractors interviewed – 10 day stand still period has just expired. No objections or challenges received to preferred tender. PCSA /stage 4 contracts being prepared for signing. PCSA stage 4 design and costing to run for 16 weeks, after which a report will be presented to Cabinet to confirm cost agreement (January). Site Investigations October 23 Contractors to start on site Feb March 24.	Green
Commenced the phased demolition of Ty Dewi Sant and the old multi-storey car park	Sep 23 Ty Dewi Sant demolition completed. MSCP awaiting demolition.	Green
71-72 The Kingsway completed.	Sep 23 Construction underway.	Green
Progressed discussions on a new ferry service linking Wales with the South West of England	Sep 23 Discussions underway.	Green

## Performance Indicators

Measure Ref ↑	Measure	Target	Actual	Performance
BBMA5	Number of contracts started with Beyond Bricks & Mortar Community Benefit clauses in their contracts	10	7	▲
CTT4	The amount of money spent by visitors to the City & County of Swansea (£million)	Annual PI - data to be reported at end of year		
EC2	The Percentage of all major applications with an economic imperative that are approved	100%	100%	★
EC7	Average Turnaround Time for Land Charge Searches completed in the period	10.00	1.69	★
EP28a	The percentage of all Planning Applications determined within agreed timescales	90.00%	96.10%	★
ESD1	Value of inward investment related to property-based projects where the authority owns land (£000's)	Annual PI - data to be reported at end of year		

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### Corporate Risk for the Transforming the Economy and Infrastructure Priority

Risk Title	Risk Description	Inherent Risk	Overall RAG 30.06.	Overall RAG 30.09.
Local economy and infrastructure	If the local economy and infrastructure is not transformed and supported to be resilient to economic challenges and changes to government policy on climate change, including flood risk and associated regulatory restrictions, and does not take advantage of opportunities to attract new development and investment, then it will not fulfil its potential as a regional centre to raise aspirations, improve services, lift skills, improve connectivity, create well-paid employment opportunities and improve the well-being of Swansea citizens.	25	9	9

# Tackling Poverty and Enabling Communities

## Why is this a Well-Being Objective?

Between 2023 and 2028, the Cost of Living crisis and ongoing economic challenges will continue to impact on individuals, families and communities across Swansea. Poverty is multi-dimensional, complex, growing and impacting more people in Wales. The council has an important role to play in helping people to alleviate poverty, improving their personal prosperity through better skills and jobs, and address the key issues influencing poverty such as homelessness.

We also see a role for our communities in supporting people to deliver early interventions, improve the wellbeing of local people and build collaborative relationships with service providers. Our vision for this priority is to create welcoming, strong, resilient, connected and prosperous communities as part of our response to tackle and alleviate poverty in Swansea.

Tackling poverty and enabling communities is a wellbeing objective because we need to:

- continue responding to the global economic pressures - including the Cost of Living crisis - that are impacting on our communities.
- target support for people in poverty or at risk of poverty in order to alleviate poverty and tackle the longer-term impacts on our society.
- focus on helping people to avoid the need to access services by promoting early interventions and preventative action.
- embed the lived experience of people in poverty across our services to ensure that we understand and meet those needs.
- create communities that are safe and resilient where people's rights and needs are respected.
- improve the personal prosperity of individuals through opportunities to develop skills, improve employability, access jobs and look after their own wellbeing.

## Challenges

Levels of poverty which remains persistently high - with almost a quarter of people in Wales living in poverty - and impacts on life expectancy, health outcomes and adverse effects on the poorest areas.

People's experiences of poverty covering a range of common issues including access to essential resources such as housing, fuel, energy, clothing, footwear, food, and water, as well as support with finances, exclusion from services, and emotional and relationship issues.

The extra costs that people on low incomes must pay for essentials - such as transport, fuel and food - due to the poverty premium, compounded by the ongoing Cost of Living crisis.

The role our communities play in tackling poverty and preventing people's needs from escalating to the point where they need services or interventions.

Changes to population and demographics as well as local population needs as our communities have more older people, become more urbanised and require more homes to be built.

Opportunities to work closer with communities to tackle these important challenges, building on the networks, strengths and assets of our local areas.

The Council is making good progress in its efforts to tackle poverty under continuing national challenges around the Cost of Living crisis and ongoing economic pressures on public services.

Strategic direction is being developed through our engagement work as we refresh our Tackling Poverty Strategy, with a recent survey receiving over three hundred responses and public consultation planned for Q3. We have delivered targeted grants such as the Holiday Food Fund (over £140k spent on summer holiday food for children and young people). Our Communities for Work Plus employability programme had the highest number of 'into works' in Wales during Q1. Welfare Rights Advisors have helped to raise over £1m in welfare benefits already this year. We have undertaken planning around improving digital inclusion as well as developing toolkits and guides for our corporate volunteering policy.

Homelessness remains a key challenge as presentations of homelessness has risen, with work to build more energy efficient and affordable homes progressing alongside increasing our stock of council properties through new builds and acquisitions.

The Council is making good progress in its efforts to enable communities to become resilient, safe, welcoming and prosperous.

We are planning elements of the Communities Anchor project of the Shared Prosperity Fund to develop approaches around corporate volunteering, community growing and improving co-production with local communities. A new Enabling Communities Grant (covering previous funds around COAST, Swansea Spaces and the Holiday Food Fund) will launch in November. Engagement Transformation work has included the launch of the new Collaboration Station at the National Waterfront Museum. Local Area Coordinators are currently supporting over a thousand people in our communities and continue to support community improvements. We have undertaken action planning around community resilience & self-reliance as well as the Council's promotion of Social Enterprises.

Across this priority, resources have been challenged to cope with demand in key areas like homelessness prevention and reliance on grant funding for key services are a key risk in terms of sustainability and recruitment. We continue to monitor and mitigate risks relating to poverty and the Cost of Living crisis alongside operational and performance risks. Work on a performance framework aligning elements of poverty and community work is continuing and will inform our council-wide approach to achieving this priority over the period of the Corporate Plan.

In summary, we are on track to deliver our commitments in the Corporate Plan for 2023/24 and we are exceeding nearly all of our Key Performance Indicators.

## Supporting Objectives

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Strategic direction - We will develop methods of working with people with lived experience to co-produce and publish our aligned strategic visions, outcomes and priorities for Tackling Poverty and Community Enablement.	Sep 23 Engagement and co-production of the Tackling Poverty Strategy is ongoing through the summer months of 2023. We envision that co-production will feature as a key principle of the future delivery of our work on tackling poverty and enabling communities.	Green
Cost of Living - We will reduce levels of poverty and mitigate the impacts of being in poverty by rolling out government grants, providing welfare rights advice and implementing targeted schemes including the 'free bus ride' initiative and Swansea Spaces.	Sep 23 We have received and are administering Period Dignity in Communities and Direct Food Support grants. A Holiday Food Fund was launched in August in response to the withdrawal of the FSM Holiday Payments. Welfare Rights Advisors are delivering training courses to develop skills in diagnosing and solving benefit problems.	Green
Tackling and preventing homelessness - We will implement the Housing Support Programme Strategy to support people who are homeless or at risk of becoming homeless.  Page 92	Sep 23 There has been a key focus on the need to deliver on the rapid rehousing strategic priority and creating more affordable temporary and permanent accommodation. TACP funding has ensured that these priorities are being met, however with the continuing cost of living crisis and rise in homeless presentations means that tackling and preventing homeless is very challenging in the current climate.	Amber
Making more homes available - We will offer more energy efficient and affordable homes to help minimise household costs, as well as increasing the availability and quality of social housing, to help more people access accommodation that is suitable for their needs.	Sep 23 As above (440, 455) New build schemes are progressing at various stages of design, procurement. Ex-council 'buy back' acquisition programme continues. To date, 222 additional council properties have been added to the housing stock including: new build/conversion= 97, Acquisitions = 125.	Amber
Improving people's prosperity - We will deliver programmes of employability, skills development and community enhancements that help people to improve their prospects for the future and volunteer their time to contribute to their local communities.	Sep 23 Employability Mentors support individuals into employment who are on the Communities for Work Plus and Pathways projects. CFW+ have supported over 800 residents with over 250 entering employment. Residents are supported at the three offices, local community hubs and the central quadrant hub. Digital Basic training and support (following on from the Get Swansea Online programme) is delivered as part of the Lifelong Learning Service. The LLS courses for the new academic year started in the second quarter.	Green

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Empowering communities - We will embed the principles of human rights across our work with communities, empowering local people to get more involved in the co-production of services, community cohesion and social value.	Sep 23 Engagement Transformation Lead Officer started in post 1st July 2023, The development and launch of the new community engagement space The Collaboration Station Sept 2023. Mapping exercise "Connecting Team Swansea" is currently out for staff to complete. The development of the new Bright Ideas Campaign to bring people across the ages together to share ideas, inform community projects and initiatives.	Green
Keeping communities safe - We will tackle anti-social behaviour through targeted initiatives and support for people who are vulnerable or at risk by improving the presence of enforcement and using events / technologies to protect local people and property.	Sep 23 Anti-social behaviour is a Safer Swansea Partnership priority. Scrutiny Call for Evidence has met with many statutory and non statutory organisations and services, and will have a report in the Autumn 2023 with recommendations for Cabinet to consider.	Green
Building community assets - We will continue to grow the assets of all communities across Swansea by using a strengths-based approach to increase resilient community-led initiatives (such as social enterprises) and establish integrated community hubs aligned with our Local Library Plan.	Sep 23 COAST programme was implemented and delivered. We received over 160 applications which totalled over £800,000 and allocated funding to 141 projects which totalled £580,000. COAST is a holiday provision delivering a range of activities including sport, wellbeing, arts/crafts, environmental and social. There was approximately 20,000 attendances but we have not completed the evaluation collation yet.	Green

## Success Measures

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Published our refreshed Tackling Poverty Strategy, working co-productively with our partners and people with lived experience of poverty.	Sep 23 Refresh of the Tackling Poverty Strategy has progressed during Q2 as a result of the engagement phase of strategy development. Good engagement with partners, networks, forums and the general public through our survey which was live during August and September.	Green
Developed a Tackling Poverty Performance Framework that aligns objectives, outcomes and performance measures related to tackling poverty.	Sep 23 Work has progressed with the draft performance framework covering tackling poverty and enabling communities areas. Supplemental developments for a data framework and a quality framework have also been drafted. Further review and engagement planned for Q3.	Green
Began a review of the Council's Housing Allocations Policy to ensure focus on providing suitable homes for vulnerable people, unintentionally homeless and people who may be struggling with poverty.	Sep 23 Review of the Housing Allocations Policy has commenced and is on course to be completed by 2024.	Green
Agreed a strategy to support homeless individuals as the COVID-19 hotel use ends whilst continuing with our 'always a bed' pledge.	Sep 23 We are continuing to provide temporary accommodation to any person that requires it under the legislation. Due to the increase in homeless presentations and the lack of move-on accommodation, we are seeing a high levels of households in temporary accommodation and these numbers are continuing to rise.	Red
Supported the establishment of the Swansea Sustainable Food Partnership.	Sep 23 Hosted by the Environment Centre, Bwyd Abertawe is Swansea's Sustainable Food Partnership. Welsh Government funding in 2023/24 is supporting the ongoing work of the partnership. More information is available at <a href="http://www.environmentcentre.org.uk/bwydabertawe">www.environmentcentre.org.uk/bwydabertawe</a>	Green
Published our Corporate Volunteering Policy to develop and manage voluntary action within the organisation.	Sep 23 Volunteering Policy for the hosting of volunteers within council services is continuing in line with the development of a Managers Toolkit and Volunteers Handbook. Shared Prosperity Fund project is being planned to develop the application of the Council's policy.	Green



## Performance Indicators

Measure Ref ↑	Measure	Target	Actual	Performance
HBCT01a	Average time for processing new claims (Housing Benefit)	28.00	18.84	★
HBCT01b	Average time for processing notifications of change in circumstances Housing Benefit)	6.00	7.48	▲
HBCT02a	Average time for processing new claims (Council Tax)	31.00	29.07	★
HBCT02b	Average time for processing notifications of change in circumstances (Council Tax)	5.00	3.39	★
HSG16a	Number of affordable homes completed by LA	26	88	★
HSG16b	Number of affordable homes completed by RSL	176	210	★
HSG16c	Number of affordable homes completed under S106 or other	24	28	★
POV05	Amount of welfare benefits raised through securing rights & entitlements by the Welfare Rights Team	£175,000	£702,044	★
POV10	Number of people gaining employment through Employability Support	134	173	★
POV11	Number of accredited qualifications and sector specific training achieved by adults with L/A support	13	251	★
POV12	Value of grants received by the Tackling Poverty Development Team to support organisations and serv	£100,000	£143,980	★

## Corporate Risk for the Tackling Poverty and Enabling Communities Priority

Risk Title	Risk Description	Inherent Risk	Overall RAG 30.06.	Overall RAG 30.09.
Impact of Poverty	If there is increased demand on Council services due to an increased number of residents experiencing the impact of poverty due to the pandemic and cost of living pressures. Then the impact includes increased debt, reduction in household income and negative impact on health and well-being.	16	9	9
Cost of living crisis	If the cost of living crisis continues or gets worse, then it will lead to greater pressure on housing supply, increased housing costs, higher levels of homelessness and increased demand on housing, tenancy support, homelessness and other Council services.	25	16	16
Social Cohesion	If we do not manage to continue to improve community involvement and break down barriers amongst people in terms of economic disparities, encourage tolerance to avoid social discord and strengthen community development throughout all ages, then we could see increasing community tensions, disorder and civic unrest exacerbated by the cost of living crisis and perceived differences and people not feeling heard or listened to.	16	NO RAG	6

## Delivering on Nature Recovery and Climate Change

### Why is this a Well-Being Objective?

Following Welsh Government declarations for Wales, the Council has declared both a Climate Emergency in June 2019 and a Nature Emergency in November 2021. Using the Welsh Government Route map to net zero, Swansea Council will align with its principles, knowing what needs to be done now, by 2022-26 Low Carbon becoming the norm and by 2030 where choosing carbon zero is routine.

Sound governance has been established within the council to act on such challenges and all activity will be driven within the parameters of the Well-being of Future Generations Act (Wales) 2015, the Environment Act (Wales) 2016, the Strategic Equality Plan and the Corporate Plan and the Swansea (PSB) Well-being Plan.

To ensure that in addition to achieving net zero 2030 for Swansea Council, we will work with partners, organisations, schools, businesses to support Swansea as a whole county and citizens in its efforts to become net zero by 2050, aligning with the Net Zero Wales Carbon Budget (2) 2022/2025. Establishing both Climate and Nature Charters and a Pledge Wall to encourage active participation and help build a healthier, more prosperous and biodiverse/ ecologically resilient Swansea.

Swansea is one of the most ecologically rich and diverse counties in the UK. Its unique variety of habitats and species and wonderful range of parks, greenspaces, nature reserves, beaches and landscapes needs to be maintained, enhanced and sustainably managed for the benefit of everyone now and into the future.

Our natural environment and biodiversity is under threat and in decline due to unsustainable human activities. Habitats and species are being lost at an alarming and unsustainable rate. We need to raise awareness of the impacts of biodiversity loss and climate change at the local level and provide information, advice, and practical support and incentives to encourage others to take action and collaborate to deliver positive solutions to these challenges.

We want everyone to have access to, understand, appreciate and benefit from Swansea's outstanding natural environment and to play their part in looking after and enhancing it, resulting in a healthier, greener and more prosperous Swansea.

Our future survival and quality of life is dependent on healthy resilient natural environment, the multiple benefits it provides to society and on reducing our carbon emissions to net zero.

We have a moral responsibility to look after biodiversity for its own intrinsic value.

### Challenges

A public sector target of 2030, ahead of the Welsh Government's target of 2050 for the whole of Wales, will give us our best chance of keeping global warming below 1.5°C. This is the tipping point at which the climate impacts we're already experiencing will go from bad to potentially catastrophic. We'll see natural systems cross danger points, triggering lasting changes such as extreme storms, heatwaves, mass loss of natural habitats and species.

We are at a critical point in time for nature recovery and without urgent transformative change, many of our species and habitats will continue to decline or become extinct. Halting and reversing the loss of biodiversity through reducing harm and unsustainable use and moving to a situation where we are working with nature to maintain healthy resilient ecosystems that will continue to provide long-term quality of life (or ecosystem services) benefits upon which we all depend.

Tackling climate change, which is one of the greatest challenges facing us all and we need to reduce our carbon footprint and to mitigate for and adapt to the likely risks and impacts.

Creating high quality environmentally and low carbon responsible and sustainable green jobs that make the most of our unique natural resources e.g. through environmental tourism, sustainable land and coastal management, local food production, sustainable waste management, energy efficiency, renewable energy and carbon capture. As such we will explore and support projects such as on and off shore renewables which align to these ambitions.

Reducing inequalities in health and well-being by maintaining and enhancing a high quality and accessible natural environment plus ensuring fair access to low carbon energy, homes, travel options, sustainably sourced food and greener job opportunities.

Sustainably managing and enhancing the quality of our natural resources including air, water, soils and biodiversity will help increase Swansea's ecological resilience and the well-being of its inhabitants.

### 2030 steps

The Council continues to deliver on Nature Recovery and Climate Change. The 2022-23 emissions data was successfully submitted to Welsh Government, showing an overall reduction in scope 1 & 2 emissions.

### 2050 steps:

The Climate Signatories group is established and has specific projects assigned to them. These include working alongside the PSB to deliver on the climate change elements of the new Well Being Action Plan. Two projects are being driven by the group:

- The development of a Swansea Adaptation & Mitigation Plan.
- A 'Good Practice' mapping exercise, led by NRW

### Nature Recovery Steps:

The Nature Conservation team has been working with a wide range of partner organisations within Swansea and Gower to develop the Local Nature Recovery Action Plan (LNRAP). The plan has cabinet approval and sets out key objectives and actions that address issues causing declines in biodiversity in Swansea. It features 25 key actions to guide partner groups within the Swansea Local Nature Partnership. The aim by 2030, is to ensure that at least 30 percent of Swansea is protected and effectively managed for nature.

### 23-24 measures:

Achievements include the completion of the EV charging point installations at the Heol y Gors depot. The Fleet Manager currently working on an ULEV Strategy update.

The Lagoon project continues to progress, with a recent funding application made to hopefully commence to the next phase of feasibility on a District Heating Network.

The Energy Team have launched a Premise Manager Energy Toolkit, encouraging officers to audit their buildings and make simple changes to help not only reduce emissions but also to save money on energy bills. A pilot at Gorseinon Library and Housing Services building delivered good results. This supports a recent report by one of our environmental partners studying building emissions, suggesting we can make approx. 10% reductions in energy savings through behaviour change.

### 23-24 KPI's:

Encouraging staff to complete the new two Climate Change and Nature Recovery training modules has had some success and the Strategic Climate Change Project Manager and Biodiversity Natural Environment Officer have been piloting some face-to-face sessions. It is anticipated that this targeted approach will form part of the strategy to help build staff knowledge.

The tree planting season is just commencing for 2023-24.

### Risks and Challenges:

The challenges we are facing include continuing with limited financial and human resources to deliver and push harder towards the NZ2030 ambition. In the main we are relying on external funding and without large investment – particularly on our buildings and fleet, the emissions figure will no doubt begin to plateau. We will look at opportunities to secure funding, but this is challenging given the pressures in the Council's MTFP.

There is a significant risk that Swansea Council won't achieve net zero 2030 without significant additional investment including support nationally with resourcing. With regard to fleet – there is also concern on the ULEV supply chain putting our new KPI CCNR5 at risk. The overall risk of not achieving net zero 2030 as a council is highlighted as RED on the corporate risk register.

## Supporting Objectives

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Achieve net zero carbon emissions by 2030, following the approved Swansea Council Net Zero 2030 Delivery Plan.	Sep 23 22-23 emissions data submitted to WG Sept 23, down on previous year, several reasons for improvements bringing us more in line with similar councils.	Red
Reduce the council's impact on the environment, monitoring via the Welsh Government reporting process on the 6 organisational categories.	Sep 23 Delivery plan in place monitoring all 6 categories up to 2030, but risk lack of funds to deliver full plan. Cabinet report December 23 to provide full performance update.	Red
Replace for street lighting with LED.	Sep 23 25,480/29,026 street lights now LED (88%). 1,438 fitted during 2022/23. 13% saving in total CO2 emissions of lighting stock compared to 2021/22	Amber
Develop a new County-wide tree planting map allowing us to plant thousands of new trees.	Sep 23 Tree canopy coverage and planting opportunity map has been completed	Green
Continue to review the council transport fleet to maximise opportunities for use of a green fleet in line with its green fleet strategy.	Sep 23 Approx 100 ULEV vehicles and supporting chargepoints introduced. Alternative fuel trial being scoped (HVO) and fleet utilisation review commencing to understand fleet demand/need for potential efficiencies. Next phase of chargepoint installations being planned to enable renewing next tranche of vehicles (subject to being financially viable)	Green
Collectively support the wider Swansea ambition, working alongside Climate Charter signatories, PSB, citizens, schools, businesses, community groups and environmental partners to help deliver the Welsh Government ambition of Net Zero Wales by 2050.	Sep 23 All schools moving to Sigma by . Delivery of 8 projects through the Environmental Partner Framework to support business and community projects across Swansea, find out the current position regarding food and food production in the county and assess decarbonisation of some of the schools/leisure centres.	Green
Develop a Swansea Adaptation and Mitigation Plan.	Sep 23 SPF bid approved	Green
Support delivery of the first phase of the Blue Eden Lagoon project.	Sep 23 Project Governance under construction, cabinet report approved May 23	Green
Progress the development of a council-operated solar energy farm at the City's Tir John site.	Sep 23 Now linked in with Blue Eden / (Swansea Energy and Transport Hub and Port Redevelopment Project)	Green

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Aim to make neighbourhood greening improvements.	Sep 23 Wild About your Ward greening opportunities identified in some wards, awaiting implementation following confirmation of grant aid. Opportunity mapping will continue to be rolled out across wards until at least March 2025.	Green
Support and enable the increase and availability of electric vehicle (EV) charging points and develop a wider EV charging strategy.	Sep 23 Capital grant funding secured for the delivery of 'fast' and 'rapid' publicly available EV chargepoints in 2023/24, from the Welsh Government's Ultra Low Emission Vehicle Transformation Fund. No funding beyond March 2024 secured to date.	Green
Progress discussions on the development of a hydrogen fuelling hub.	Sep 23 Active discussions in place with various parties	Green
Work towards announcing new Active Travel routes, which develop the built and natural environment and encourages higher levels of physical activity.	Sep 23 Capital grant funding secured for the delivery, whole or in part, for 6 active travel routes in 2023/24 from the Welsh Government's Active Travel Fund. Further funding awarded for continued development of a number of future schemes and minor works. No funding beyond March 2024 secured to date.	Green
Develop and monitor the delivery of the Section 6 Corporate Biodiversity Plan and the Resilient Wales goal through annual business planning and reporting mechanisms up to 2028. We will report to Welsh Government every 3 years in line with our Biodiversity Duty.	Sep 23 Second Section 6 Duty monitoring report to Welsh Government Jan 2023. Preparation of the action plan 2023 to 2025 is under preparation,	Green
Contribute to the review, delivery and monitoring of the Local Nature Recovery Action Plan and a County Wide Green Infrastructure Strategy.	Sep 23 LNRAP drafted due for adoption late 2023. County wide GI strategy to be produced jointly with NRW to be held in abeyance until 2024/25	Green
Improve awareness and understanding of climate change and our natural environment through provision of information, training, and events.	Sep 23 Two training modules available for staff and 3 toolbox talks. Communications group to meet in October. Website development is ongoing. Face to face training for some service areas delivered and being offered out further.	Green
Work to improve the ecosystem resilience of Council owned Sites of Special Scientific Interest (SSSI), Local Nature Reserves (LNR), Sites of Importance for Nature Conservation (SINCs) and greenspaces.	Sep 23 This ongoing work continues to be carried out across many council owned protected sites, nature reserves and SINCs but is dependent upon grant funding	Green
Continue to deliver a programme of wildflower planting and management and take actions that help to control invasive non-native species.	Sep 23 15 sites trial covering approximately 15.2 hectares of parks, amenity grasslands and road verges being managed as species rich wildflower meadows. Five 'cut and collect' machines purchased to enable this work. too early to assess outcomes. Sites are also being planted up with native local provenance wildflowers. INNS are being mapped and subject to an ongoing programme of treatment focusing on nature reserves and Council land, subject to funding	Green

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Engage with local communities to encourage volunteering and to support them taking action to enhance and maintain their local greenspaces and wildlife sites.	Sep 23 Volunteer engagement and activities continues following confirmation of Local Places for Nature grant funding	Green
Take action to maintain and improve the quality of our air, water and soils.	Sep 23 Air Quality Annual Progress Reports have been submitted and approved by Welsh Government. Next report to be submitted 20th sept 2023. Bathing Water Model continues to predict hourly concentrations at Swansea Bay DSP. Officer involvement with contaminated land and planning applications continues.	Green

## Success Measures

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Reported to Welsh Government on Swansea Council 2022-23 emissions.	Sep 23 Next reporting template due for submission first week of Sept 23	Green
Progressed phase 2 of the public buildings retrofit programme.	Sep 23 Carbon Reduction Retrofit Service Provider have completed High Level Assessments (HLAs) across a number of corporate buildings and schools.	Green
Delivered a second year of projects with our environmental partner.	Sep 23 2 briefs being undertaken so far in 23-24 with others being worked on for delivery by end of March 24.	Green
Agreed a development model and progressed with the Tir John solar farm development.	Sep 23 Swansea Council Planning Committee approved planning permission (6th Jun 23)	Green
Agree and announce progress on the Blue Eden project with our development partner.	Sep 23 Cabinet report approved May 23	Green
Built strong collaborative working relationships with climate charter signatories on the 2050 Swansea agenda.	Sep 23 Climate Signatories has working groups established to deliver A&M and Mapping as agreed with PSB. Work being completed according to schedule/funding	Green
Began to implement our ULEV Transition Strategy 2021-2030, with over 150 ULEV vehicles and fleet charge points.	Sep 23 Over 110 vehicles are now full battery electric or hybrid with supporting charge points located across 12 different Council owned sites. Future planned renewals pending financial viability.	Green
Continue with the LED street lighting installation programme.	Sep 23 In region of 2000 LEDs programmed to be fitted during 2023/24. Further CO2 emissions reduction in region of 10% expected by end of 2023/24	Green
Agreed an updated tree planting and management strategy.	Sep 23 Current opportunity mapping will be incorporated into the Council's Tree Strategy	Amber
Planted hundreds of new trees.	Sep 23 It is expected around 300 trees will be planted during 23/24 ( resource capacity)	Green
Produced a series of Wild About your Ward Maps to support communities in identifying opportunities for enhancing local greenspaces and wildlife sites and engaging them in volunteering activities.	Sep 23 Approx. 4 more maps to be produced	Green
Drafted Management Plans for Council owned Local Nature Reserves.	Sep 23 Management Plans for the sites are completed	Green
Targeted treatment and/or removal of Invasive Non-Native Species on nature sites.	Sep 23 Targeted treatment of INNS on Nature Sites ongoing	Green



Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Produced a series of Climate Change and Nature Recovery e-training modules.	Sep 23 2 modules completed and on Fusion. 121 staff have completed the training as of 3/10/23	Green
Continued amenity grassland and road verge management trials to establish as species rich wildflower meadows.	Sep 23 Trials continue to be rolled out	Green
Prepared a Local Nature Recovery Action Plan and a County Wide GI Strategy.	Sep 23 LNRAP has been prepared. Preparation of the GI Strategy has been put on hold	Amber

## Performance Indicators

Measure Ref ↑	Measure	Target	Actual	Performance
CCNR1	Numbers of trees planted during the year across the council			Annual PI - data to be reported at end of year
CCNR2	The increase in number of council locations with renewable energy sources			Annual PI - data to be reported at end of year
CCNR3	Number of Members and officers that have completed Climate Change and Nature Recovery Training			Annual PI - data to be reported at end of year
CCNR4	Number of projects delivered through the Environmental Partners Framework (annual)			Annual PI - data to be reported at end of year
CCNR5	Percentage of the Council fleet which are Ultra Low Emission Vehicles (ULEVs)			Annual PI - data to be reported at end of year
WM1009b	Percentage of Municipal Waste collected and prepared for reuse and/or recycled (annual)			Annual PI - data to be reported at end of year

### Corporate Risk for the Nature Recovery and Climate Change Priority

Risk Title	Risk Description	Inherent Risk	Overall RAG 30.06.	Overall RAG 30.09.
Net Zero 2030 target	If we do not transform the Council to meet the collective net zero commitments asked of public bodies by Welsh Government at sufficient pace and scale, then there is a possibility that the net zero target will not be met by 2030.	25	9	16

## Transformation and Financial Resilience

### Why is this a Well-Being Objective?

Between 2023 and 2028 there will be extraordinary challenges facing individuals, communities, and public bodies in Swansea, especially as a result of the ongoing recession. At a time when our population needs public services most, they are under threat as our costs rise but our funding is falling in real terms.

Against that background, if the council is to meet its statutory obligations and deliver the commitments it has made, we will need to innovate and transform how we operate, working closer than ever with others, while continuing to ensure that everything we do is focused on meeting the needs of our population.

Our vision for this priority is to deliver, through transformation, at least the same if not better outcomes for our population and to improve our efficiency by making significant changes to the way we work and how our services are designed and delivered.

Transformation and Financial Resilience is a wellbeing objective because we need to:

- manage the public finances sustainability, recognising the huge constraints that we know we will face over the term of the plan;
- ensure the council is adequately protected from major external risks such as cyber and data security breaches and recruitment and retention challenges we have across the council and in some services in particular;
- redesign and remodel aspects of the organisation and its services to meet the changing needs and expectations of citizens within the resources we have available;
- improve our customer service to ensure our citizens can access council advice, guidance, information, and services how and when they need them;
- improve how we consult, engage, and involve our population to help us design effective and efficient services;
- reduce the council's carbon footprint;
- create a culture that values high performance, learning and continuous improvement.

### Challenges

The long-term public finance outlook is likely to remain challenging.

Demographic changes which will continue to drive increasing demand for council services and increasingly complex needs.

Demographic changes impacting on the local labour market and composition of the council workforce.

Technological advances are expected to continue to pave the way in defining how modern societies and economies will interact and develop into the future, not least our approach to social interactions, where we work, and how we access key services like education, health, and social care.

Recognition that solving complex challenges, such as substance misuse, strategic planning and meeting the needs of the older population cannot be met by the council alone and will increasingly require whole system responses through greater collaboration with partners and the population we serve.

### Director's Update

There has been considerable progress made under the Transformation and Financial Resilience Objective during the first six months of 2023-24. In terms of the steps under this objective, 9 of 11 are showing a Green RAG Status at the end of quarter 2, while two are showing an AMBER status. Aligned to this 8 of 11 success measures are green, while 3 remain AMBER.

Turning first to transformation, the new Successful and Sustainable Swansea Corporate Transformation Plan was approved by Cabinet in April 2023. The plan contains 12 distinct transformation programmes – seven which are service focused and five which are cross cutting and will transform ways of working across the council as a whole. During the first six months the focus has been to get programmes up and running, establish their governance and set detailed milestones and success measures. As such progress is rated as Amber, reflecting that some programmes are still in the early stages while others (e.g., Net Zero) face significant funding challenges.

In terms of financial resilience, 2023-24 is proving to be a challenging year with a forecast overspend by year end on service budgets of £13.47 million as at the end of July 2023, although this will ultimately be heavily influenced by the final pay award once resolved. In addition, £4.8 million of the £13,47 million is attributable to increases in energy costs which is being met corporately. Officers are working hard to reduce the forecast overspend and as at 31 July 70% of the budget savings identified for 2023-24 were on target to be delivered.

During the second quarter work began on planning for the 2024-25 budget and the 2024-28 Medium Term Financial Plan. Financial sustainability over the medium term is an ongoing challenge in the face of a poor public finance outlook, combined with ongoing pay and price inflationary pressures. Risks are growing for the whole of local government and whilst the Council has high earmarked reserves, it has an ambitious set of spending plans and low General Reserves. Against that background, tough decisions are likely to be needed later in the year, but the actual level of savings required will not be known until the local government finance settlement is published in December 2023. In the meantime, work is ongoing to ensure the council can present a balanced set of budget proposals in the spring of 2024, whatever the settlement outcome.

## Supporting Objectives

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Financial Sustainability: We will maintain a sustainable Medium Term Financial Strategy which ensures the council's revenue and capital resources are aligned to the achievement of the council's wellbeing objectives and delivery of our statutory obligations both over the term of the plan. We will ensure required savings are delivered, and commercial opportunities are taken, where appropriate	Sep 23 Established process which is internally significantly well under way for 24-25 setting. Grave uncertainties over funding from UK and WG and outlook. Lack of clarity over current year financial position compounds matters. Funding likely to be severely constrained so whilst process is well established and always previously delivered would therefore ordinarily be assessed Green risks mean process itself is downgraded to Amber and currently sits in risk register as maximum risk red and maximum event impact red.	Amber
Transforming our business: We will, deliver the council's transformation vision and goals, through the development and implementation of a corporate transformation plan, incorporating the key transformational change projects and programmes from across the council	Sep 23 Transformation Delivery Board received an update on progress in September. Of the 12 programmes 5 were Green, 4 were Amber and 3 were RED (ie Community Hub Model needed further clarity of scope, Net Zero needs additional funding from WG; and Adults Social Care savings delivery is at risk due to increasing demand and costs. Actions being taken to turn REDs to AMBER and AMBERs to GREEN. So far in 2023-24, £812,00 delivered in savings. Overall AMBER RAG status	Amber
Digital Transformation: We will implement the council's digital strategy, using digital technology to improve people's lives, to enable digital access to services 24 hours a day, and to improve operational efficiency	Sep 23 Projects have started and highlight reports on progress are being presented at the Digital Transformation Board, which in turn feeds into the Corporate Transformation Programme Board.	Green
Workforce Development: We will implement the council's workforce strategy and thereby develop a motivated and committed workforce that is innovative, supported, skilled and customer focused.	Sep 23 The Workforce and OD Transformation Programme Board have met quarterly since December 2022 and have confirmed the first phase of projects to be delivered by mid-2024. Work is continuing on each of these projects through their individual work programme strands.	Green
Organisational Development: We will ensure the organisation's working model reflects the needs of the population and the council's agile working approach. We will review senior management structure, pay and grading to ensure they are appropriate and in line with the wider workforce pay and grading scheme. We will develop tools to help services implement change, including training, guidance, and support.	Sep 23 The new business partner model has been established in the HR&OD structure and recruitment to posts was completed in August 2023. Training and upskilling has been provided via LGA on workforce planning and business partners will be commencing discussions with Heads of Service on their organisational design requirements. In addition, hybrid operating models were implemented in Q1 of 2023 with all Heads of Service confirming their operating models in the post pandemic hybrid environment with a review due in November 2023.	Green

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Performance Management and Governance: We will continue to embed self-assessment into the council's performance management arrangements and develop a culture of high performance, learning and continuous improvement. We will ensure the corporate plan, Medium Term Financial Strategy and Transformation Plan are aligned and support the long term needs of the population. We will also keep the council's constitution under review, including ensuring appropriate delegation arrangements for members and officers are in place.	Sep 23 The councils self-reflection tools assessing progress meeting the performance duty introduced by Part 6 of the Local Government and Elections (Wales) 2021 Act and the well-being duty introduced by the Well-being of Future Generations Act (Wales) 2015 were completed at the end of 2022/23 and were reviewed and challenged in Q1 (May 2023) at the Strategic Governance Group; areas for continued improvement were identified for further action.	Green
Procurement: We will continue to develop the procurement supply chain locally, regionally and pan Wales to ensure our procurement activity remains ethical, looks to embed real living wage aspirations across the supply chain and weighs ever more heavily on the social value of procurement, in line with the sustainable development principles.	Sep 23 Cabinet report approved on approach. Social value templates in place and being reviewed by Services. New legislation due late 2023 - with associated reporting being developed by Welsh Government - will impact this policy area, so publication of statutory guidance awaited and is next critical step. Service Centre / Fusion support anticipated in Q3 for development of spend tracking system to ascertain local impact.	Green
Operational estate: We will continue to rationalise the council's operational estate to maximise efficiency and reduce our carbon footprint.	Sep 23 The decarbonisation programme is aligned with disposal programme, ensuring efficiencies are maximised.	Green
Partnership working: We will continue to collaborate with our regional partners to progress our wellbeing objectives, specifically in relation to the strategic development planning, regional transport planning, promoting the economic well-being and delivering a regional energy strategy (through the Corporate Joint Committee), health and social care (through the West Glamorgan partnership) and education improvement (through Partneriaeth). Our collaboration will also continue with local partners to develop and implement solutions to the challenges facing our population and progress our 2040 Wellbeing Plan (through the Public Services Board).	Sep 23 A report on the work done by the Councils strategic partnerships will be developed and presented to Governance & Audit Committee in Q3 (October 2023).	Green
Interacting with our population: We will continue to ensure that where appropriate we consult, engage, and involve our population in the design and the delivery of our policies and services, enhancing our co-production capacity and capability through pilot projects and practice.	Sep 23 Our updated Consultation and Engagement Strategy was approved by Council in May. We commissioned Coproduction Wales to work with us to improve our knowledge and capacity for undertaking more co-productive activity across the Council. a Coproduction champions network has been established and regular training opportunities have provided to council staff. Pilot projects have been selected to put co-production into practice, Work has begun on producing a Coproduction Policy for the Council.	Green

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Equality, Diversity and Human Rights: We will continue to embed equality, diversity, and human rights through all that we do as a council, implementing our Welsh Language proving the quality of our integrated impact assessments and working with partners to make Swansea a Human Rights City.	<p>Sep 23</p> <p>Our IIA process ensures that Equality and Diversity and Human Rights implications addressed in every decision we make as a Council and are embedded policy development. Swansea declared itself a Human Rights City in December 2022. Work has been undertaken with partners to engage with communities our Human Rights Action Plan. In June we held a successful engagement event. Around 100 people attended from across Swansea. The outcomes of this event will directly inform the Actions plans.</p>	Green

## Success Measures

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
A balanced Medium Term Financial Plan.	Sep 23 Links directly to above. Has to be delivered in law or S114 results. Same risks – well established process which has always worked in past - risks have escalated pan local government materially.	Amber
Delivered all the savings proposals approved in the 2023-2024 Final Budget.	Sep 23 Tracker established and considered by directorates alongside routine pfm process. First formal report will accompany core budget monitoring to Cabinet in October. Process is green, likelihood of 100% delivery is definitively not assured (70% +more likely realistic) so overall remains assessed Amber.	Amber
A corporate transformation plan which is delivering major changes across the council.	Sep 23 The Corporate Transformation Plan is in its first year and contains 12 programmes which will deliver major changes across the council. So far it has delivered £812,000 of savings. The RAG Status is AMBER reflecting that the programmes are in start up phase and therefore the major changes are planned for later years of the programme	Amber
Embedded a new Enterprise Resource Planning System.	Sep 23 Oracle Fusion went live in April 2023. Post go-live issues and support continues. Two final issues will be resolved very shortly and then the project will close and transition into the new Oracle operating model. One of the initial objectives was to transfer to the new cloud platform in the first instance. Once this is embedded innovation and process improvements will follow so the Council can maximise all the new functionality in the system.	Green
Increased the number of Swansea Account users and improved its functionality.	Sep 23 This forms part of a new project called 'Improving Customer Access' and is included in the Digital Transformation Programme. Alongside the project, the Council is aiming to promote the Swansea Account to residents as new services become available. The long term aim is to have most requests for service logged through the Swansea Account so residents can track progress within a secure environment. The project is underway	Green

Steps to achieving the Well-Being Objective	Sep 23	
	Assessment of Overall Progress	RAG
Introduced new leadership behaviours and a management learning and development offer.	Sep 23 The work to revise the Council's values and behaviours (including leadership behaviours) has been completed and is due for approval shortly (pending graphic design work). This has included a wide range of stakeholder engagement including trade unions, employee engagement group and Leadership/CMT representatives to refresh the values and behaviours. Work is also underway to align these values and behaviours to our reward and recognition strategy and performance management.	Green
Reviewed the senior management structure and pay and grading scheme.	Sep 23 The Chief Officer job evaluation exercise is underway. Each post holder has submitted a job evaluation questionnaire for analysis by LGA consultants and the rank order process is now being undertaken. Results are anticipated in October.	Green
Strengthened the council's Performance Management and Quality Assurance Framework.	Sep 23 New Assurance Framework in place. The councils self-reflection tools assessing progress meeting the performance duty introduced by Part 6 of the Local Government and Elections (Wales) 2021 Act and the well-being duty introduced by the Well-being of Future Generations Act (Wales) 2015 were completed at the end of 2022/23 and were reviewed and challenged in Q1 (May 2023) at the Strategic Governance Group; areas for continued improvement were identified for further action.	Green
Further develop our local supply chain and also ensure commercial opportunities are developed where appropriate.	Sep 23 This work is integrated into objective / ID 830 (please see the full update text for that area) working with the Director of Finance and responsible Cabinet Member. Key success measure is the live reporting of the economic impact of our commercial relationships via Fusion (resource to be provided via Service Centre in Q3), from which targets can then be set.	Green
Reduced carbon emissions from our operational estate.	Sep 23 Work continues on reducing emissions from our public buildings with phase two of our re: fit programme currently underway.	Green
Rolled out co-production training and toolkits across the council.	Sep 23 Our updated Consultation and Engagement Strategy was approved by Council in May. We commissioned Coproduction Wales to work with us to improve our knowledge and capacity for undertaking more co-productive activity across the Council. a Coproduction champions network has been established and regular training opportunities have provided to council staff. Pilot projects have been selected to put co-production into practice, Work has begun on producing a Coproduction Policy for the Council.	Green



## Performance Indicators

Measure Ref ↑	Measure	Target	Actual	Performance
CHR002	The number of working days/shifts per full time equivalent lost due to sickness absence <i>Note from Corporate Performance Team - Data quality under review</i>	2.50	2.46	★
CUST12	Percentage of corporate stage 1 complaints closed in 10 working days or less	No quarterly performance target set	94.1%	
CUST13	Number of Swansea Account holders active during the period	No quarterly performance target set	333	
CUST2a	Number of online payments received via City & County of Swansea websites	32,500	36,855	★
CUST2c	Number of forms completed online for fully automated processes .	No quarterly performance target set	188,544	
FINA16	Percentage of invoices and payment documents paid within 30 days.		No data - Data will be available in Q3	
PROC12	Number of data breaches which have resulted in a penalty notice being issued by the ICO	0	0	★

## Corporate Risk for the Transformation and Financial Resilience Priority

Risk Title	Risk Description	Inherent Risk	Overall RAG 30.06.	Overall RAG 30.09.
Financial Control - Budgetary Control, Annual Budget and MTFP Delivery	If we fail to deliver the Councils MTFP and maintain sufficient in year financial control, and in particular do not ensure we contain service overspending, especially now inflation is embedded at levels far above the expectation of around 2%, then we will not be able to respond appropriately to continuing austerity, demographic pressures, increasing demand and pay and price pressures and changing public expectations in both current and future years.	25	25	25
Workforce recruitment and retention	If the Council is not able to recruit and retain the right staff, then there may be reduced workforce capacity and capability, leading to lower staff morale and productivity, poor work quality, increased staff costs and reduced staff well-being / higher sickness rates.	12	6	6
Successful and Sustainable Swansea Corporate Transformation Plan	If the council does not successfully deliver the Successful and Sustainable Swansea Corporate Transformation Plan it will struggle to deliver its wellbeing objectives and to respond effectively to the external challenges it is facing up to 2028.	12	8	8

# Integrated Impact Assessment Screening Form – Appendix B

Please ensure that you refer to the Screening Form Guidance while completing this form.

## Which service area and directorate are you from?

Service Area: SDU

Directorate: Corporate Services

### Q1 (a) What are you screening for relevance?

- New and revised policies, practices or procedures
- Service review, re-organisation or service changes/reductions, which affect the wider community, service users and/or staff
- Efficiency or saving proposals
- Setting budget allocations for new financial year and strategic financial planning
- New project proposals affecting staff, communities or accessibility to the built environment, e.g., new construction work or adaptations to existing buildings, moving to on-line services, changing location
- Large Scale Public Events
- Local implementation of National Strategy/Plans/Legislation
- Strategic directive and intent, including those developed at Regional Partnership Boards and Public Services Board, which impact on a public bodies functions
- Medium to long term plans (for example, corporate plans, development plans, service delivery and improvement plans)
- Setting objectives (for example, well-being objectives, equality objectives, Welsh language strategy)
- Major procurement and commissioning decisions
- Decisions that affect the ability (including external partners) to offer Welsh language opportunities and services
- Other

### (b) Please name and fully describe initiative here:

Q2 2023/24 Performance Monitoring Report – This report is on performance during Q2 2023/24 in delivering the Council’s key priorities as set out in the Corporate Plan.

### Q2 What is the potential impact on the following: the impacts below could be positive (+) or negative (-)

	High Impact		Medium Impact		Low Impact		Needs further Investigation	No Impact
	+	-	+	-	+	-		
Children/young people (0-18)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Older people (50+)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Any other age group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Future Generations (yet to be born)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Disability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Race (including refugees)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Asylum seekers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Gypsies & travellers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Religion or (non-)belief	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sex	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Sexual Orientation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Gender reassignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Welsh Language	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Poverty/social exclusion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Carers (inc. young carers)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Community cohesion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Marriage & civil partnership	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pregnancy and maternity	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Human Rights	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

## Integrated Impact Assessment Screening Form – Appendix B

**Q3 What involvement has taken place/will you undertake e.g. engagement/consultation/co-productive approaches?  
Please provide details below – either of your activities or your reasons for not undertaking involvement**

This report is on performance during Q2 2023/24 in delivering the Council's key priorities as set out in the Corporate Plan, so there is no direct impact on people or communities and no consultation or engagement is required.

---

**Q4 Have you considered the Well-being of Future Generations Act (Wales) 2015 in the development of this initiative:**

- a) Overall does the initiative support our Corporate Plan's Well-being Objectives when considered together?  
Yes  No
- b) Does the initiative consider maximising contribution to each of the seven national well-being goals?  
Yes  No
- c) Does the initiative apply each of the five ways of working?  
Yes  No
- d) Does the initiative meet the needs of the present without compromising the ability of future generations to meet their own needs?  
Yes  No
- 

**Q5 What is the potential risk of the initiative? (Consider the following impacts – equality, socio-economic, environmental, cultural, legal, financial, political, media, public perception etc...)**

High risk

Medium risk

Low risk

---

**Q6 Will this initiative have an impact (however minor) on any other Council service?**

Yes  No If yes, please provide details below

---

**Q7 Will this initiative result in any changes needed to the external or internal website?**

Yes  No If yes, please provide details below

---

**Q8 What is the cumulative impact of this proposal on people and/or communities when considering all the impacts identified within the screening and any other key decisions affecting similar groups/ service users made by the organisation?**

*(You may need to discuss this with your Service Head or Cabinet Member to consider more widely if this proposal will affect certain groups/ communities more adversely because of other decisions the organisation is making. For example, financial impact/poverty, withdrawal of multiple services and whether this is disadvantaging the same groups, e.g., disabled people, older people, single parents (who are mainly women), etc.)*

## Integrated Impact Assessment Screening Form – Appendix B

**Outcome of Screening – This report is on performance during Q2 2023/24 in delivering the Council’s key priorities as set out in the Corporate Plan, so there is no direct impact on people or communities.**

- Q9 Please describe the outcome of your screening using the headings below:**
- **Summary of impacts identified and mitigation needed (Q2)**
  - **Summary of involvement (Q3)**
  - **WFG considerations (Q4)**
  - **Any risks identified (Q5)**
  - **Cumulative impact (Q7)**

(NB: This summary paragraph should be used in the ‘**Integrated Assessment Implications**’ section of corporate report)

**Full IIA to be completed**

**Do not complete IIA – please ensure you have provided the relevant information above to support this outcome**

NB: Please email this completed form to the Access to Services Team for agreement before obtaining approval from your Head of Service. Head of Service approval is only required via email.

<b>Screening completed by:</b>
<b>Name: R Rowlands</b>
<b>Job title: Strategic Delivery &amp; Performance Manager</b>
<b>Date: 17/11/23</b>
<b>Approval by Head of Service:</b>
<b>Name: Lee Wenham</b>
<b>Position: Head of Communications &amp; marketing</b>
<b>Date: 17/11/23</b>

Please return the completed form to [accesstoservices@swansea.gov.uk](mailto:accesstoservices@swansea.gov.uk)

# Agenda Item 9



## Report of the Cabinet Member for Investment, Regeneration, Events and Tourism

### Development and Regeneration Scrutiny Performance Panel 16 January 2024

#### Swansea Destination Management Plan 2023-2026

<b>Purpose:</b>	To update the Panel on the Destination Management Plan (DMP) 2023-2026 for Swansea, which was approved by Cabinet on 19 October 2023
<b>Policy Framework:</b>	Swansea Council Corporate Plan Priority: 'Transforming our Economy and Infrastructure'  Swansea Wellbeing Plan  Wellbeing of Future Generations Act
<b>Consultation:</b>	Access to Services, Finance, Legal Economy and Infrastructure Service Transformation Committee Corporate Briefing Approved by Cabinet
<b>Report Author:</b>	Steve Hopkins
<b>Finance Officer:</b>	Paul Roach
<b>Legal Officer:</b>	Debbie Smith

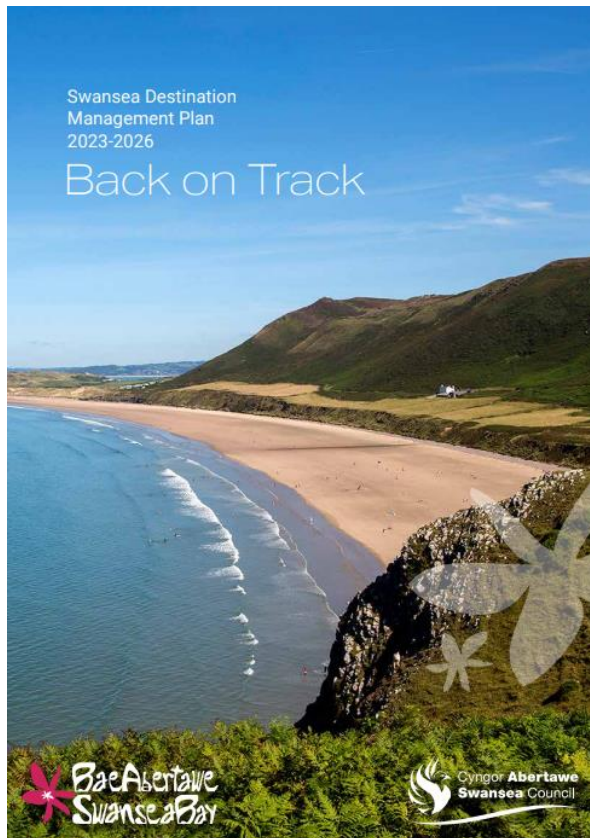
#### 1. Introduction

- 1.1 The Development and Regeneration Scrutiny Performance Panel have requested an update on the Destination Management Plan (DMP) 2023-2026 for Swansea.

1.2 In this report we give an overview of the DMP for the period 2023-2026, including the research which informed the plan, its strategic priorities and delivery mechanism.

## 2. Swansea Destination Management Plan 2023-2026

### 2.1 Setting the scene



#### What is a Destination Management Plan?

A Destination Management Plan (DMP) is best described as ‘the process of leading, influencing and coordinating the management of all the aspects of a destination that contribute to a quality visitor’s experience, taking account of the needs of visitors, local residents, businesses and the environment.’ (Source: VisitBritain.org)

Great destinations are great places to live, work and visit. A well-managed destination can bring long-term growth to the local economy, attract new investment as well as safeguard and create employment opportunities.

Our Destination Management Plan 2023-2026 is a combined response by Swansea Council and its private and public sector partners. It offers renewed hope for economic recovery following the successful re-opening of the tourism and hospitality industry and focusses on the strategic priorities for the next 4 years.

## Visitor economy recovery in Swansea

Throughout the pandemic, we continued to engage with our customers and to support local tourism businesses. In 2022, signs of recovery were evident in terms of consumers' confidence to return (4.2M visitors), continued inward investment in the destination and optimism amongst tourism operators – despite new economic challenges around rising costs and staff shortages.

This DMP is informed by three strategic pieces of research: a 7-month long visitor survey (1,000 face-to-face interviews), our largest ever survey of local tourism businesses (120+ responses) and a Hotel Demand Study commissioned to assess the current supply and future demand drivers for hotel developments in the city centre.



### 2.2 Strategic Priorities and Outcomes

1. **Driving Quality:** to build on success and further enhance the destination in order to deliver a distinctive and high-quality visitor experience.
2. **Breaking free of seasonality:** to develop creative, targeted marketing campaigns to enhance the area's appeal to the UK and wider world and build a stronger tourism offer outside the summer months.
3. **Encouraging Sustainability:** to nurture a more sustainable approach to tourism, both economically and environmentally, to the benefit of the environment and the wellbeing of all.
4. **Working Partnerships:** to continue to support the private sector directly and work with our public and third sector partners in order to achieve growth and prosperity for the local economy.

Priorities	Actions	Impacts	=	Outcomes
Driving Quality:	Protect and enhance natural environment	Well-managed natural environment		A distinctive, high-quality visitor experience
Breaking free of seasonality:	Develop high quality tourism product	Thriving city centre		A stronger tourism offer outside the summer season
Encouraging Sustainability:	Improve visitor experience	Reduced seasonality		
	Improve tourism offer	Improved tourism offer		
Working Partnerships:	Continue to deliver targeted marketing campaigns	Increased visitor spend		A more sustainable approach to tourism, both economically and environmentally
	Improve infrastructure and facilities	Skilled workforce ready to meet future opportunities in the sector		
	Develop strong partnerships between public, private and third sector	Strong destination brand		
	Identify relevant funding and attract further investment	More tourism businesses accessing relevant training and funding		Growth and prosperity for the local economy

## 2.3 The Bigger Picture

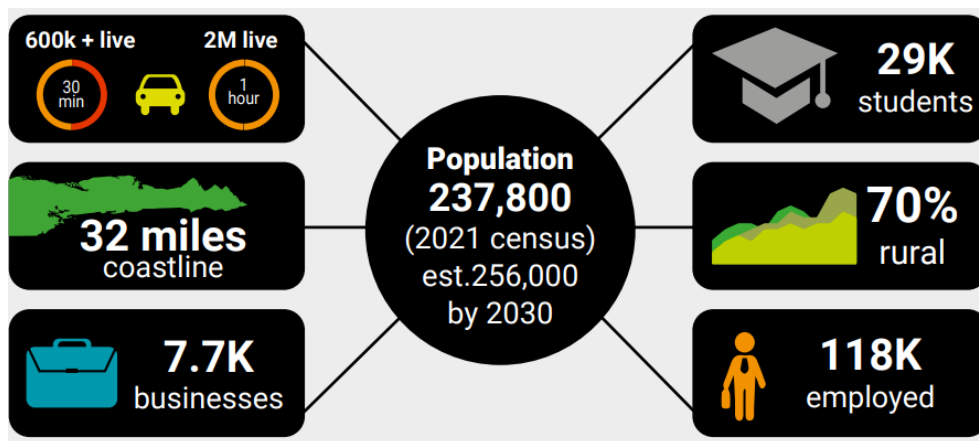
- Swansea City Centre undergoing a major transformation into a premier destination to live, work, study and visit.
- Completed projects:
  - Swansea Arena in the new Copr Bay district
  - Amy Dillwyn coastal park
  - Landmark bridge connecting city centre with waterfront
  - £3m improvement of Wind Street into greener and more family-friendly hospitality and leisure destination
  - Redesign of the Kingsway with more public spaces, better pedestrian and cycle routes
  - Opening of Penderyn Swansea Copperworks Distillery
- In development
  - New public sector hub on Oxford Street – Y Storfa
  - Refurbishment of Palace Theatre and Albert Hall
  - Enhancement of Castle Square and Swansea Amphitheatre
  - New entrances to Swansea Market and Quadrant Shopping Centre
  - New high-tech office development at 71/72



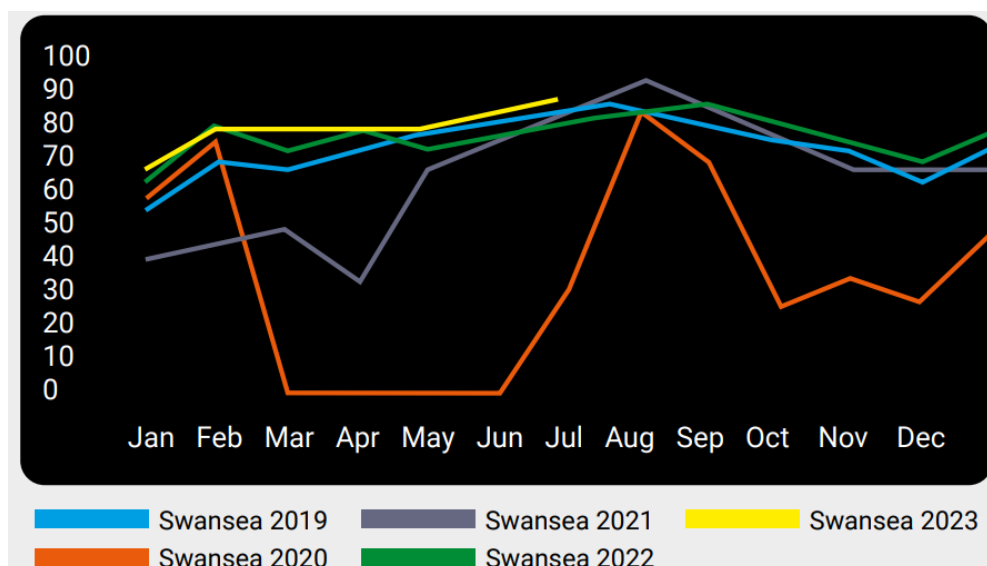
- Hafod Morfa Copperworks transformation into a leisure destination with new outdoor attraction Skyline planned for 2025 and floating pontoons
- Partnership with private sector developers Urban Splash for the mixed-use transformation of Civic Centre site and former St David's Shopping Centre
- Major hotel developments
- Early discussions about a visitor attraction and an aquarium for the Civic Centre / Paxton Street development sites
- Major events programme: Swansea is home to the Wales Airshow, IronMan 70.3, World Triathlon Para Series, Swansea Bay 10k and headline concerts in Singleton Park
- A planned programme of projects backed by Shared Prosperity Fund

## 2.4 Swansea Visitor Economy

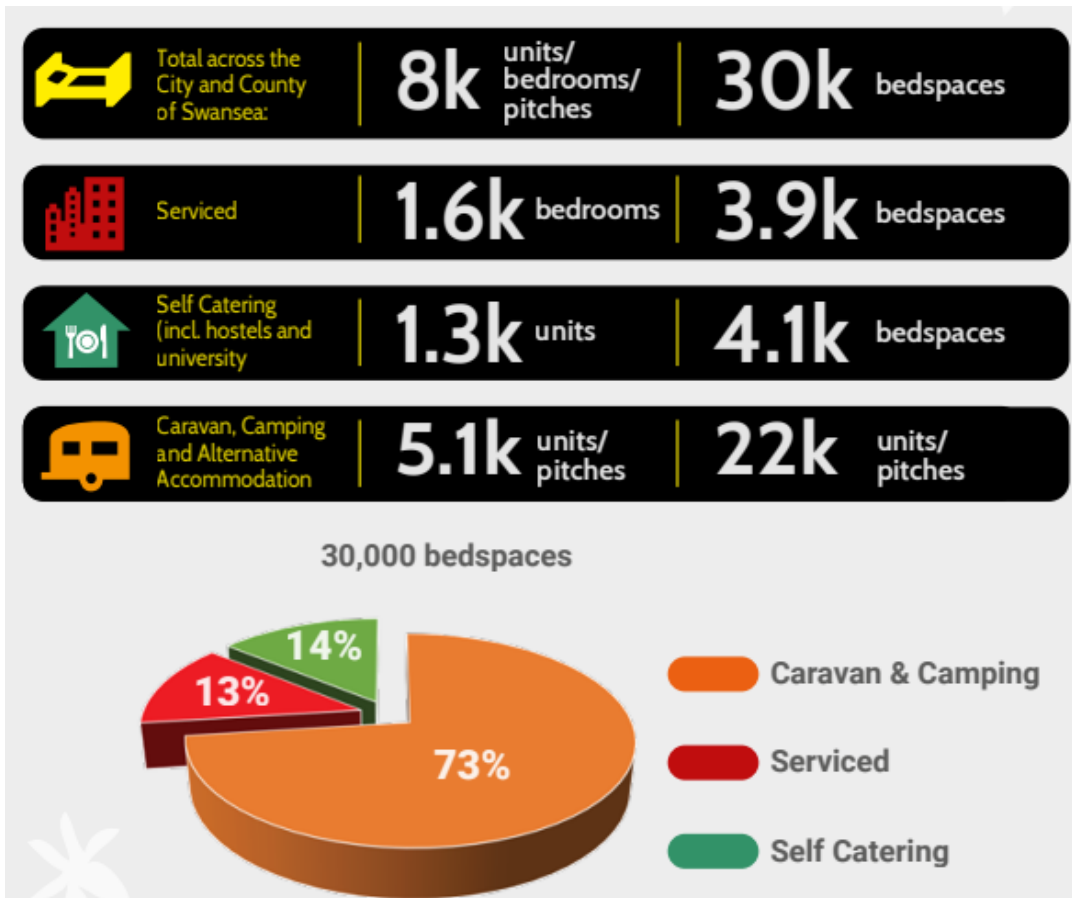
### About Swansea



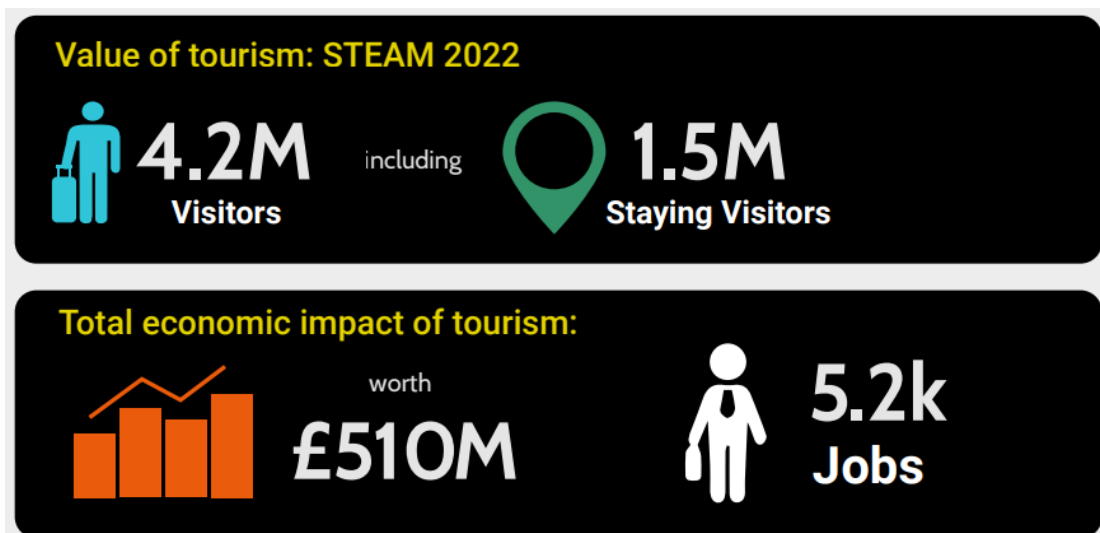
### Hotel room occupancy figures (STR %)



## Bedstock figures



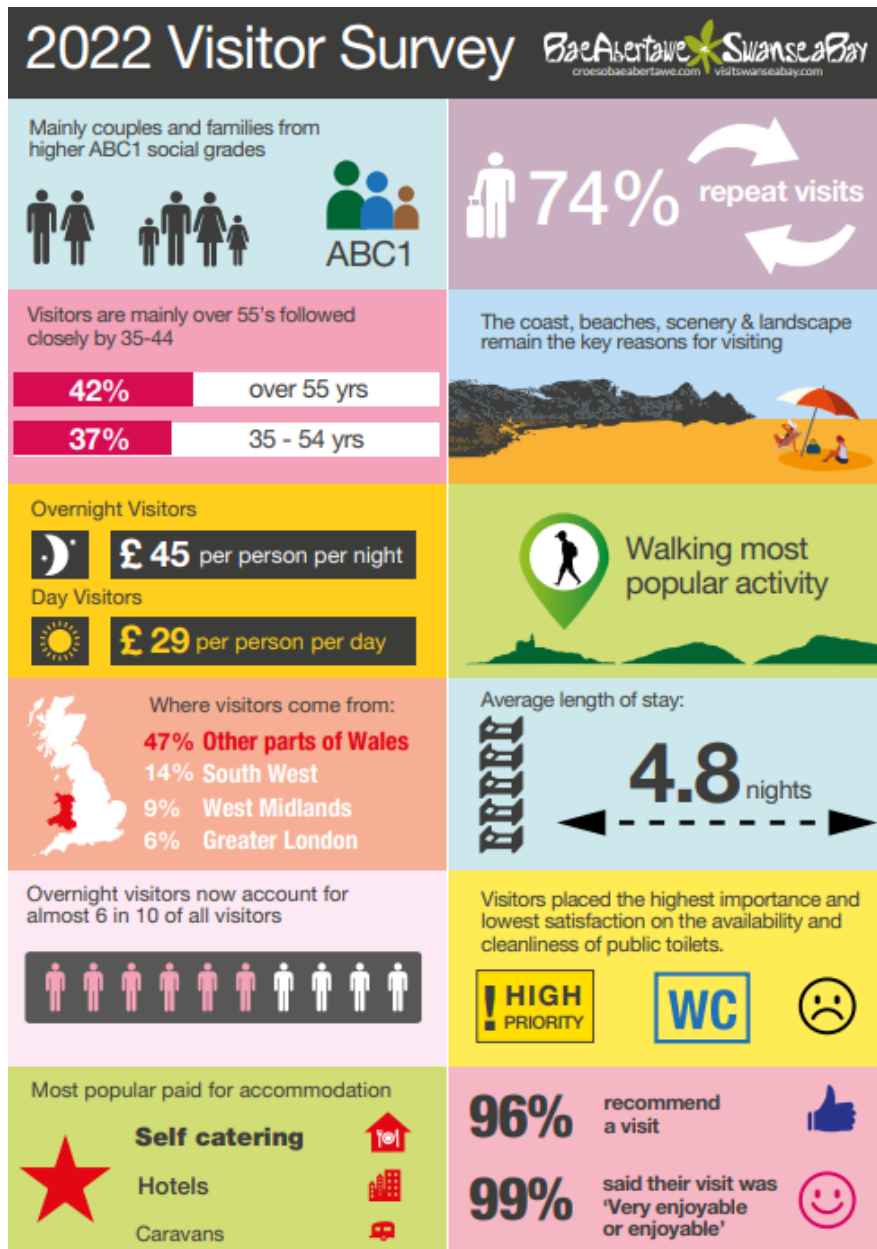
## Value of tourism



## 2.5 Visitor Survey 2022

### Key facts about our visitors

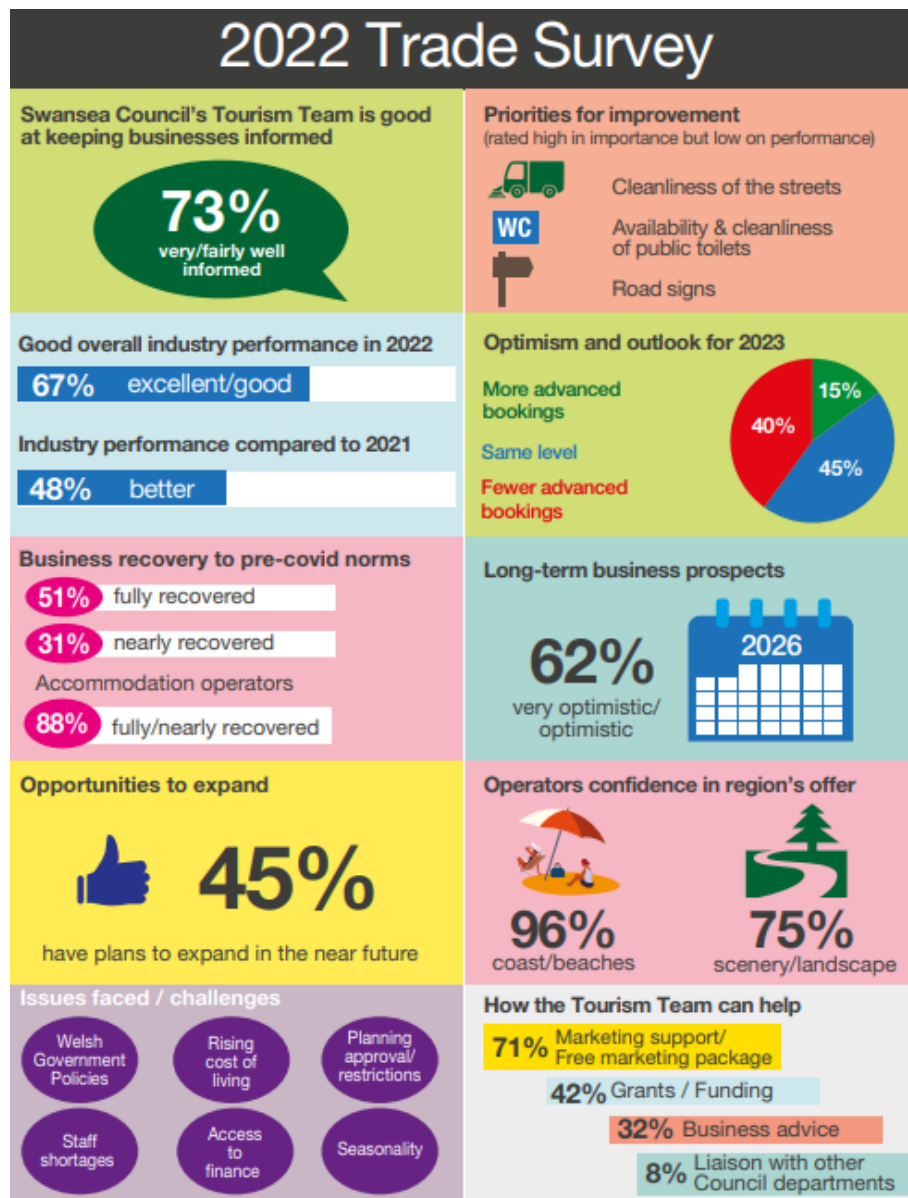
- Mostly from higher ABC1 social grades: affluent 'empty nesters' aged 45+, affluent early retired couples aged 45+ and younger affluent professionals aged 25+
- Mainly from the Midlands, London, Southeast and other parts of Wales.
- Visitors highly complimentary about their visit: 96% would recommend a visit to someone else.
- 99% found their visit enjoyable, two thirds of which found it 'very' enjoyable.
- 57% likely to be staying overnight
- Average spend on the increase since 2019



## 2.6 Tourism Trade Survey 2022

### Key findings

- 73% feel well-informed by Swansea Council's Tourism Team
- Think Swansea Bay's best assets are our coast/beaches (96%) and scenery/landscape (75%)
- 67% reported 'good' or 'excellent' levels of business in 2022
- 48% reported better performance than 2021
- 82% 'nearly' or 'fully' recovered from Covid pandemic (88% for accommodation)
- 45% have plans to expand (increasing capacity, improving quality, diversifying)
- 62% feel optimistic about long-term business prospects
- Major challenges ahead: Welsh Government policies, cost of living, planning restrictions, staff shortages, access to finance and seasonality
- Think Tourism Team can help with marketing support, grants / funding, business advice and liaising with other Council departments



## 2.7 Swansea City Centre Hotel Demand Study 2022

### Key findings and recommendations

- Strong leisure and business demand all year-round
- Extensive regeneration activity is creating new demand
- Hotels performing well in Swansea: occupancy 77.3%, ADR\* at £67 and RevPAR\*\* at £52 (£60 for upscale & upper midscale hotels)
- ADR grew significantly in 2022
- Occupancy is high annually and in most months.
- Current supply is a fair mix of accommodation but comparatively low number of rooms per head.
- Supply has not kept pace with a growing demand and market is currently undersupplied: On approximately 35 days per year, an additional 10% of market rooms could be sold again, equating to a smoothed average of around 14 unsatisfied room nights per day or 5,107 room nights annually.
- Forecast future demand and supply balance: an additional 285–355 rooms needed in the market for 2026.
- This suggests potentially 3 hotels of significant inventory.
- A greater number of rooms needed going forward to the medium term (2032).
- Opportunity at midscale and upper midscale / upscale level

\*ADR (Average Daily Rate) = Room Revenue/Rooms Sold. ADR is the average rental income brought in by a paid and occupied room during a specific time period

\*\*RevPar (Revenue per Available Room) = Room Revenue/Total Rooms Available. RevPAR represents the revenue generated per available room, whether or not they are occupied

## KEY FINDINGS

Hotels performing well in Swansea – high occupancy rates

Focuses on Swansea City Centre / SA1 / Copperworks

Strong leisure and business demand all year-round

Major transformation of city centre

Growing demand – undersupplied market

## PERFORMANCE

Average Daily Rates (ADR)

**77.3%**

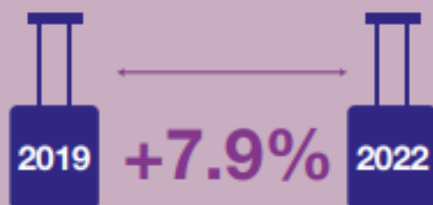
RevPar on average

**£52** (£60 for upscale & upper midscale hotel)

**TOP 10**

Swansea entered the Colliers UK Hotel Market Index 2023

Top 5 RevPar Growth in UK



## RECOMMENDATIONS

**285 - 355 =**

**+3**  
by 2026

**more by 2032**

### Opportunities

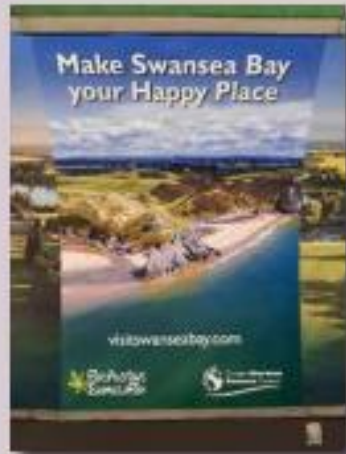
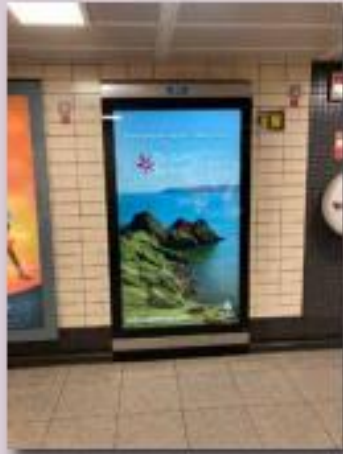


## 2.8 Destination marketing

Swansea Council promotes the destination as Visit Swansea Bay across UK markets and further afield (in partnership with Visit Wales and Visit Britain).

[Visitswanseabay.com](https://visitswanseabay.com) is the sole platform dedicated to destination marketing and is open to local tourism & hospitality operators. Since 2020, Swansea Council has offered the standard entry-level marketing package to businesses free of charge to support the industry's recovery. As a result, there has been a 70% increase in the number of Visit Swansea Bay Partners.

- Currently 235+ partners supported: accommodation, attractions, activities, retail and hospitality.
- Partners feature on [Visitswanseabay.com](https://visitswanseabay.com) and in marketing campaigns.
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- All marketing activity is measured to assess engagement and reach of campaigns.





## 2.9 Major Events

Events are a great way to stimulate a destination by raising its profile, bringing in extra visitors and supporting the local economy all year-round. They can also attract long-term business investment.

Swansea Council delivers a strong, creative programme of high-profile events all year-round and works closely with event organisers to enable other events to happen across the year.

Some of the major events taking place in Swansea include the popular Wales Airshow, IronMan 70.3, World Triathlon Para Series (WTPS) headliner concerts in Singleton Park, Swansea Half Marathon, Admiral Swansea Bay 10k, Swansea International Jazz Festival and Outdoor Theatre at Oystermouth Castle.

Events are measured by their impact - economic impact (visitor spend + organiser spend) but also social, wellbeing and environmental impact.

Major events have a key part to play in the DMP as they impact on all 4 strategic priorities - quality, seasonality, sustainability and partnership working.



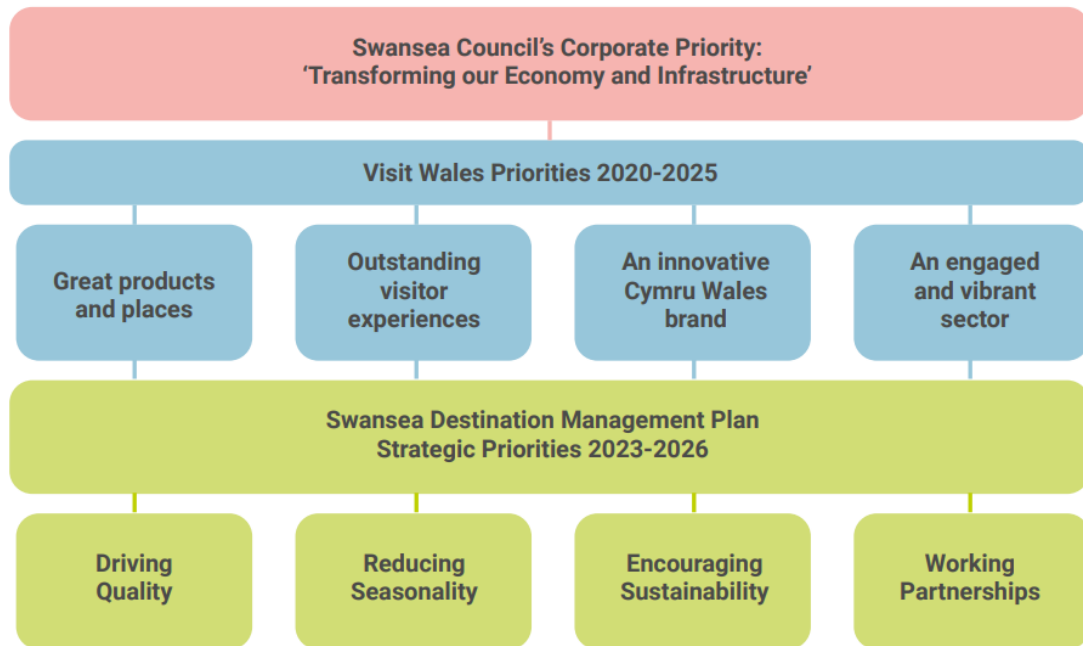
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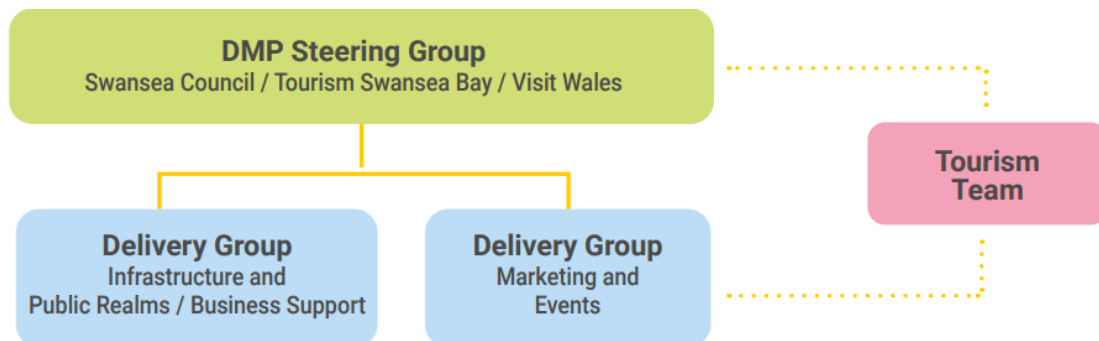
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- Beaches Management Group
- Public Toilet Working Group
- City Centre Operational Working Group

## 2.11 Governance and Delivery



The DMP Steering Group aims to meet 2/3 times a year with regular delivery groups and industry events held throughout the year. The Tourism Team acts as an administrator and co-ordinates regular communications amongst various stakeholders.



## 2.12 What success looks like

- Increased visitor spend
- More people in employment
- Higher occupancy figures
- More staying visitors
- High visitor satisfaction rates
- More partners on [visitswanseabay.com](http://visitswanseabay.com)

## 2.13 Looking forward to 2026

The ongoing regeneration of Swansea will continue to attract new and boost existing visitor numbers and spend with new reasons to visit as a result of planned developments, including:

- Skyline
- Y Storfa Community Hub
- Palace Theatre and Albert Hall
- Further transformation of City Centre incl. Castle Square, Kingsway, Civic Centre site
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- Hafod Morfa Copperworks and River Tawe pontoons
- Improvement of Swansea Amphitheatre
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## 2.14 What our partners say

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'You can see that positive things are happening in Swansea - there's a lot of money going into the area, and that was definitely a factor behind opening up the Cwtsh Hostel. Swansea is certainly going places. There's a good mixture of big developments with small independent businesses, so by working together the city is getting it right.'

#### **4. Financial Implications**

4.1 There are no financial implications associated with this report.

#### **5. Legal Implications**

5.1 There are no legal implications associated with this report.

#### **Glossary of terms:**

DMP – Destination Management Plan

STR – Smith Travel Research

STEAM - Scarborough Tourism Economic Activity Monitor

ADR – Average Daily Rate (Room Revenue/Rooms Sold). ADR is the average rental income brought in by a paid and occupied room during a specific time period

RevPar – Revenue per Available Room (Room Revenue/Total Rooms Available). RevPAR represents the revenue generated per available room, whether or not they are occupied.

**Background papers:** None

#### **Appendices:**

Appendix A – Swansea DMP 2023-2026 'Back on Track'

Swansea Destination  
Management Plan  
2023-2026

# Back on Track



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12	Tourism Trade Survey 2022
14	Swansea Hotel Demand Study 2022
16	Destination Marketing
18	Major Events
19	Strategic Fit
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21	What Success Looks Like
22	Looking Forward to 2026
23	What Our Partners Say







## Foreword

It gives me great pleasure to be able to present our 3rd Destination Management Plan for the period 2023 - 2026.

Unlike many parts of Wales, Swansea offers a strong rural, coastal and city centre product which, combined with a range of high-profile events, attracts millions of visitors every year.

Tourism is now worth over £510M to the local economy and our research shows high levels of satisfaction with many visitors returning year on year to enjoy a holiday in Swansea.

Our city centre is undergoing a multi-billion pound transformation and major investment is being pumped into new hotels and attractions across the city. With yet more exciting developments under way, there is a strong sense of confidence and optimism amongst local businesses. Our recent trade survey highlights that most tourism operators are optimistic and on their way to full recovery, with many continuing to diversify and invest in their businesses.

Our recent Hotel Demand Study suggests city centre occupancy in the serviced accommodation sector is high all year-round and that an additional 3 hotels would be required by end of 2026 to meet growing demand currently generated and predicted over the coming years.

There is no doubt now is the time to visit Swansea and invest in our thriving destination. By working closely with colleagues in the private sector, public and third sectors as well as Visit Wales, Swansea Council is committed to building on this success and play its part to ensure our destination grows and prospers sustainably and offers a high-quality visitor experience for the benefit of all.

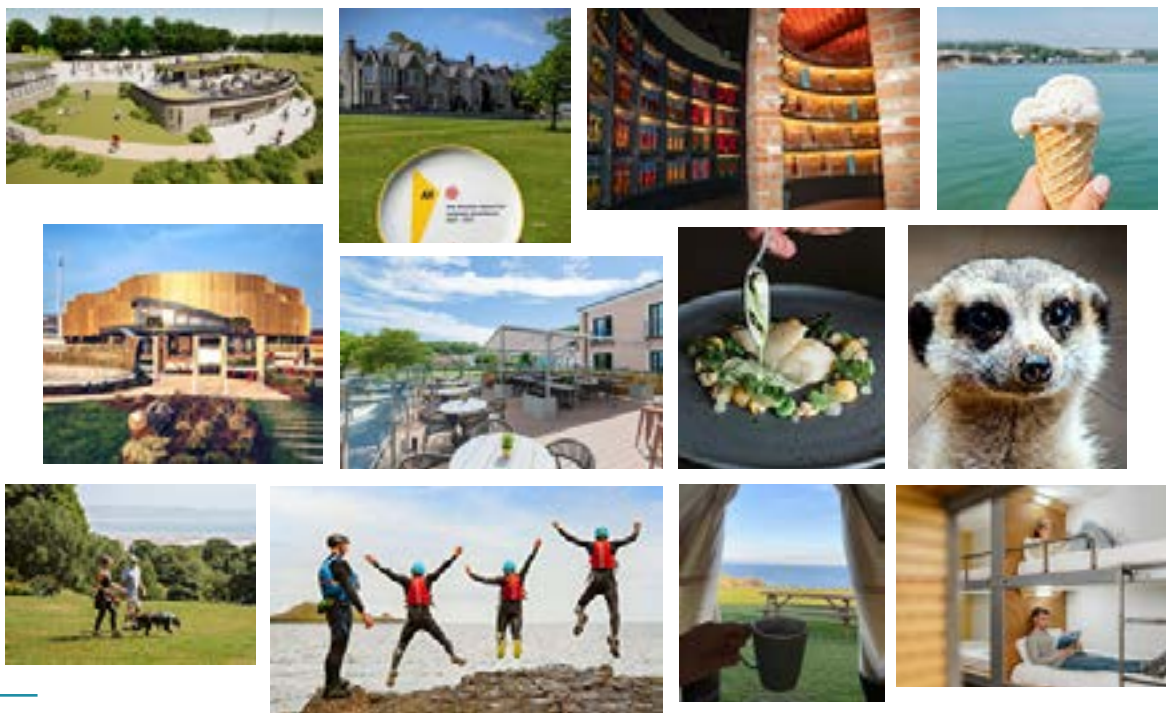
**Cllr Robert Francis-Davies**  
**Cabinet Member for Investment, Regeneration, Events & Tourism**

# What is a Destination Management Plan?

A Destination Management Plan (DMP) is best described as ‘the process of leading, influencing and coordinating the management of all the aspects of a destination that contribute to a quality visitor’s experience, taking account of the needs of visitors, local residents, businesses and the environment.’ (Source: VisitBritain.org)

Great destinations are great places to live, work and visit. A well-managed destination can bring long-term growth to the local economy, attract new investment as well as safeguard and create employment opportunities.

Our Destination Management Plan 2023-2026 is a combined response by Swansea Council and its private and public sector partners. It offers renewed hope for economic recovery following the successful re-opening of the tourism and hospitality industry after Covid and focusses on the strategic priorities for the next 4 years.



## Visitor economy recovery in Swansea

Throughout the pandemic, we continued to engage with our customers and to support local tourism businesses. In 2022, signs of recovery were evident in terms of consumers’ confidence to return (4.2M visitors), continued inward investment in the destination and optimism amongst tourism operators - despite new economic challenges around rising costs and staff shortages.

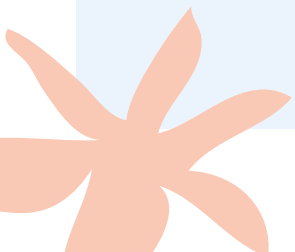
This DMP is informed by three strategic pieces of research: a 7-month long visitor survey (1,000 face-to-face interviews), our largest ever survey of local tourism businesses (120+ responses) and a Hotel Demand Study commissioned to assess the current supply and future demand drivers for hotel developments in the city centre.

# Strategic Priorities and Outcomes



- **Driving Quality:** to build on success and further enhance the destination in order to deliver a distinctive and high-quality visitor experience.
- **Breaking free of seasonality:** to develop creative, targeted marketing campaigns to enhance the area's appeal to the UK and wider world and build a stronger tourism offer outside the summer months.
- **Encouraging Sustainability:** to nurture a more sustainable approach to tourism, both economically and environmentally, to the benefit of the environment and the wellbeing of all.
- **Working Partnerships:** to continue to support the private sector directly and work with our public and third sector partners in order to achieve growth and prosperity for the local economy.

Priorities	Actions	Impacts	=	Outcomes
Driving Quality:	Protect and enhance natural environment	Well-managed natural environment	=	A distinctive, high-quality visitor experience
Breaking free of seasonality:	Develop high quality tourism product	Thriving city centre		A stronger tourism offer outside the summer season
Encouraging Sustainability:	Improve visitor experience	Reduced seasonality		A more sustainable approach to tourism, both economically and environmentally
Working Partnerships:	Improve infrastructure and facilities	Improved tourism offer		Growth and prosperity for the local economy
	Continue to deliver targeted marketing campaigns	Increased visitor spend		
	Improve infrastructure and facilities	Skilled workforce ready to meet future opportunities in the sector		
	Develop strong partnerships between public, private and third sector	Strong destination brand		
	Identify relevant funding and attract further investment	More tourism businesses accessing relevant training and funding		



# The Bigger Picture

**Swansea City Centre is undergoing a major transformation into a premier destination to live, work, study and visit.**

## **Completed projects:**

- Swansea Arena in the new Copr Bay district
- Amy Dillwyn coastal park
- Landmark bridge connecting city centre with waterfront
- £3m improvement of Wind Street into a greener and more family-friendly hospitality and leisure destination
- Redesign of the Kingsway with more public spaces, better pedestrian and cycle routes
- Opening of Penderyn Swansea Copperworks Distillery



# The Bigger Picture

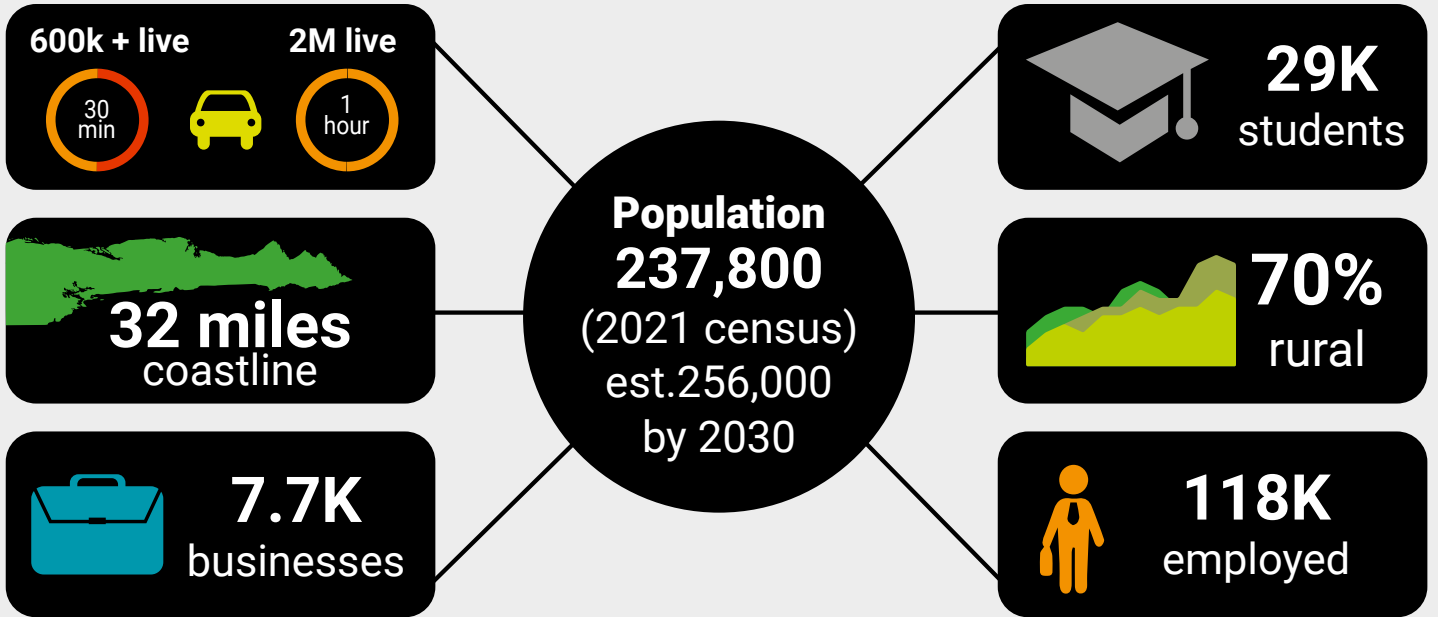


## In development

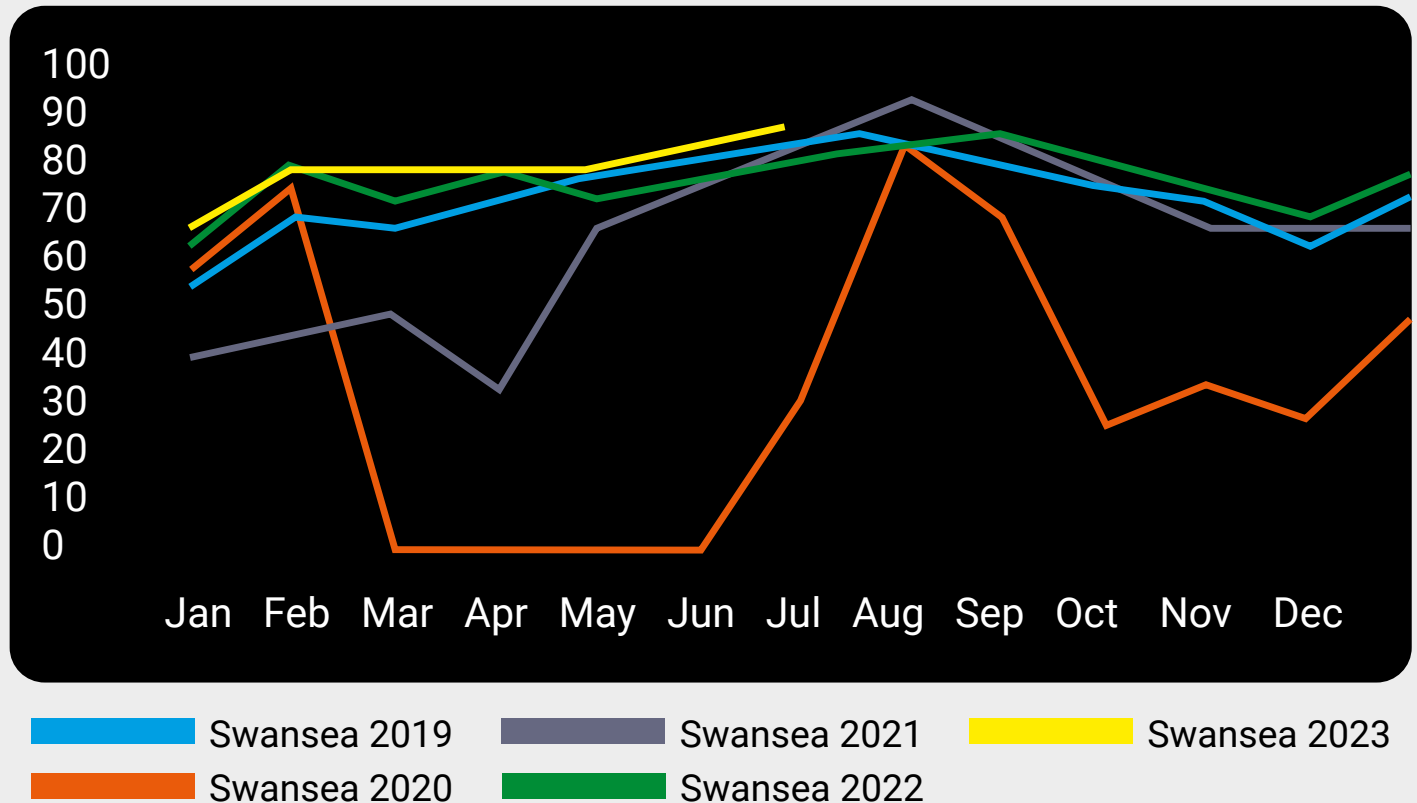
- New public sector hub on Oxford Street – Y Storfa
- Refurbishment of Palace Theatre and Albert Hall
- Enhancement of Castle Square and Swansea Amphitheatre
- New entrances to Swansea Market and Quadrant Shopping Centre
- High-tech office development at 71/72 The Kingsway
- Hafod Morfa Copperworks transformation into a leisure destination with new outdoor attraction Skyline planned for 2025 and floating pontoons
- Partnership with private sector developers Urban Splash for the mixed-use transformation of Civic Centre site and former St David's Shopping Centre
- Major hotel developments
- Early discussions about a visitor attraction and an aquarium for the Civic Centre / Paxton Street development sites
- Major events programme: Swansea is home to the Wales Airshow, IronMan 70.3, World Triathlon Para Series, Swansea Bay 10k and headline concerts in Singleton Park
- A planned programme of projects backed by Shared Prosperity Funding

# Visitor Economy in Swansea

## About Swansea



## Hotel Room Occupancy figures % (STR)



## Bedstock – headline figures (July 2023)



Total across the  
City and County  
of Swansea

**8k** units/  
bedrooms/  
pitches

**30k** bedspaces



Serviced

**1.6k** bedrooms

**3.9k** bedspaces



Self Catering  
(incl. hostels and  
university)

**1.3k** units

**4.1k** bedspaces

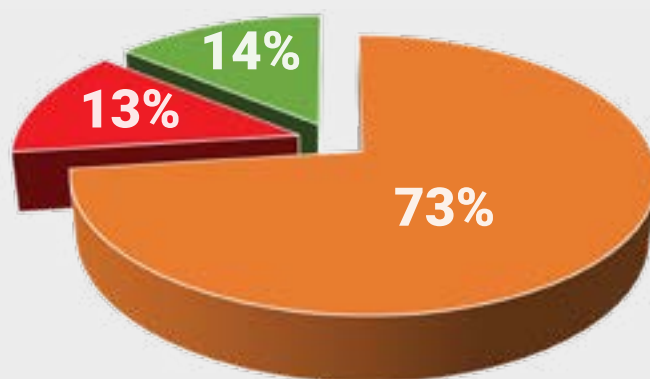


Caravan, Camping  
and Alternative  
Accommodation

**5.1k** units/  
pitches

**22k** units/  
pitches

30,000 bedspaces



 Caravan & Camping

 Serviced

 Self Catering

### Value of tourism: STEAM 2022



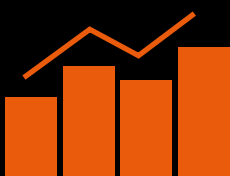
**4.2M**  
Visitors

including



**1.5M**  
Staying Visitors

### Total economic impact of tourism:



worth  
**£510M**



**5.2k**  
Jobs

# Visitor Survey 2022

Mainly couples and families from higher ABC1 social grades



Visitors are mainly over 55's followed closely by 35-44

42% over 55 yrs

37% 35 - 54 yrs

74% repeat visits

The coast, beaches, scenery & landscape remain the key reasons for visiting



## Overnight Visitors

£ 45 per person per night

## Day Visitors

£ 29 per person per day

Walking most popular activity

Where visitors come from:

- 47% Other parts of Wales
- 14% South West
- 9% West Midlands
- 6% Greater London

Average length of stay:

4.8 nights

Overnight visitors now account for almost 6 in 10 of all visitors



Visitors placed the highest importance and lowest satisfaction on the availability and cleanliness of public toilets.

HIGH PRIORITY

WC



Most popular paid for accommodation

Self catering



Hotels



Caravans



96%

recommend a visit



99%

said their visit was 'Very enjoyable or enjoyable'







## Visitor Survey 2022

### Key facts about our visitors

- Mostly from higher ABC1 social grades: affluent 'empty nesters' aged 45+, affluent early retired couples aged 45+ and younger affluent professionals aged 25+
- Mainly from the Midlands, London, Southeast and other parts of Wales
- Visitors highly complimentary about their visit: 96% would recommend a visit to someone else
- 99% found their visit enjoyable, two thirds of which found it 'very' enjoyable
- 57% likely to be staying overnight
- Average spend on the increase since 2019



Swansea Council's Tourism Team is good at keeping businesses informed



### Priorities for improvement

(rated high in importance but low on performance)



Cleanliness of the streets



Availability & cleanliness of public toilets



Road signs

Good overall industry performance in 2022

**67%** excellent/good

Industry performance compared to 2021

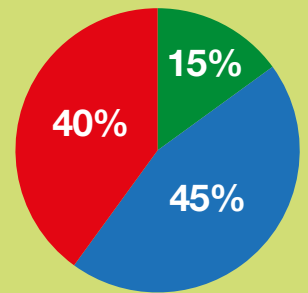
**48%** better

### Optimism and outlook for 2023

More advanced bookings

Same level

Fewer advanced bookings



Business recovery to pre-covid norms

**51%** fully recovered

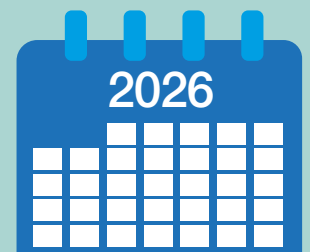
**31%** nearly recovered

Accommodation operators

**88%** fully/nearly recovered

### Long-term business prospects

**62%**  
very optimistic/  
optimistic



Opportunities to expand



**45%**

have plans to expand in the near future

Operators confidence in region's offer



**96%**  
coast/beaches



**75%**  
scenery/landscape

Issues faced / challenges

Welsh Government Policies

Rising cost of living

Planning approval/restrictions

Staff shortages

Access to finance

Seasonality

How the Tourism Team can help

**71%** Marketing support/  
Free marketing package

**42%** Grants / Funding

**32%** Business advice

**8%** Liaison with other Council departments

## Key findings

- 73% feel well-informed by Swansea Council's Tourism Team
- Think Swansea Bay's best assets are our coast/beaches (96%) and scenery/landscape (75%)
- 67% reported 'good' or 'excellent' levels of business in 2022
- 48% reported better performance than 2021
- 82% 'nearly' or 'fully' recovered from Covid pandemic (88% for accommodation)
- 45% have plans to expand (increasing capacity, improving quality, diversifying)
- 62% feel optimistic about long-term business prospects
- Major challenges ahead: Welsh Government policies, cost of living, planning restrictions, staff shortages, access to finance and seasonality
- Think Tourism Team can help with marketing support, grants / funding, business advice and liaising with other Council departments

## KEY FINDINGS



Focus on  
City Centre,  
SA1 and  
Copperworks

Hotels performing well all year round ✓

Strong leisure and business demand ✓

High occupancy rate ✓

Major transformation of city centre ✓

Growing demand ✓

Undersupplied market ✓

## PERFORMANCE

Average Daily Rates (ADR)

**£67**

Average Hotel Occupancy Rate

**77.3%**

RevPar on average

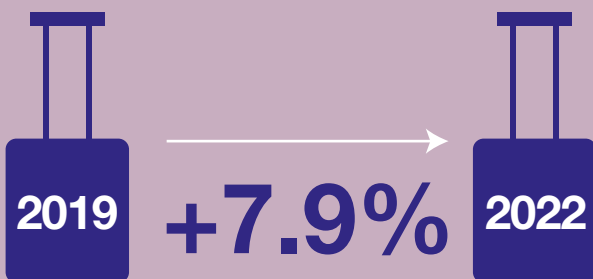
**£52**

(£60 for upscale & upper midscale hotel)

**TOP 10**

Swansea entered the Colliers UK Hotel Market Index 2023

Top 5 RevPar Growth in UK

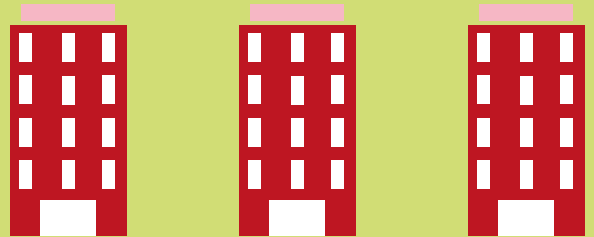


## RECOMMENDATIONS

285 - 355 new rooms needed

Equivalent to:

**3 new hotels by 2026**



**+ more rooms by 2032**

What Swansea needs more of:

Economy    Midscale    Upper Midscale    Upscale    Luxury

# Swansea City Centre Hotel Demand Study 2022

- Strong leisure and business demand all year-round
- Extensive regeneration activity is creating new demand
- Hotels performing well in Swansea: occupancy 77.3%, ADR\* at £67 and RevPAR\*\* at £52 (£60 for upscale & upper midscale hotels)
- ADR grew significantly in 2022
- Occupancy is high annually and in most months
- Current supply is a fair mix of accommodation but comparatively low number of rooms per head
- Supply has not kept pace with a growing demand and market is currently undersupplied: On approximately 35 days per year, an additional 10% of rooms could be sold again, equating to a smoothed average of around 14 unsatisfied room nights per day or 5,107 room nights annually
- Forecast future demand and supply balance: an additional 285–355 rooms needed in the market for 2026
- This suggests potentially 3 hotels of significant inventory
- A greater number of rooms needed going forward to the medium term (2032)
- Opportunity at midscale and upper midscale / upscale level

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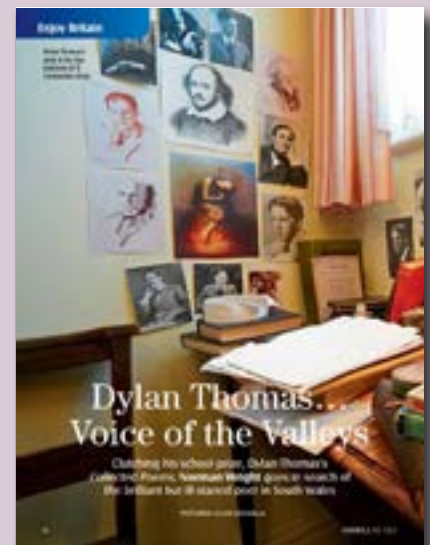
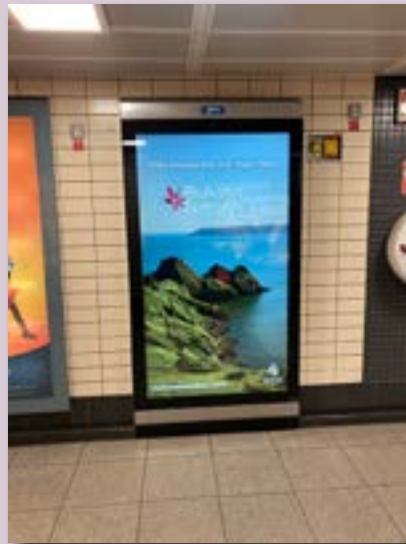
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# Strategic Fit

Swansea Council's Corporate Priority:  
'Transforming our Economy and Infrastructure'

Visit Wales Priorities 2020-2025

Great products  
and places

Outstanding  
visitor  
experiences

An innovative  
Cymru Wales  
brand

An engaged  
and vibrant  
sector

Swansea Destination Management Plan  
Strategic Priorities 2023-2026

Driving  
Quality

Reducing  
Seasonality

Encouraging  
Sustainability

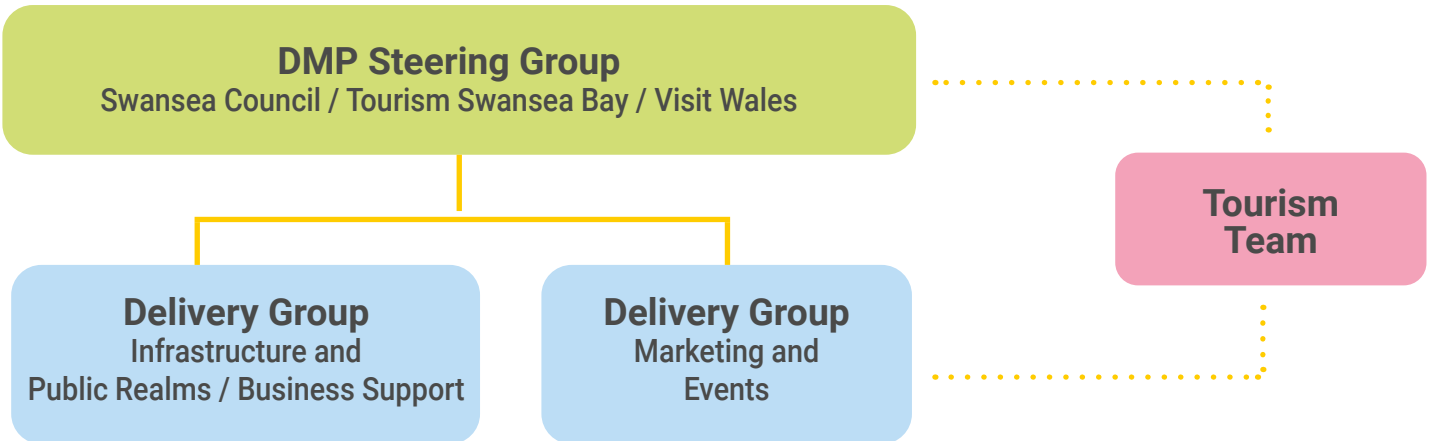
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Partnerships

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# What Success Looks Like

Increased visitor spend

More people in employment

Higher occupancy figures

More staying visitors

High visitor satisfaction rates

More partners on [visitswanseabay.com](https://visitswanseabay.com)



# Looking forward to 2026

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## The Cwtsh

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This DMP and accompanying infographics, along with additional information about tourism in Swansea Bay, can be downloaded from our tourism trade website:

[swansea.gov.uk/tourismtrade](http://swansea.gov.uk/tourismtrade)

or contact:

Swansea Council Tourism Team  
Room 136  
The Guildhall  
Swansea  
SA1 4PE

 01792 635214

Email: [DMP@swansea.gov.uk](mailto:DMP@swansea.gov.uk)



# Agenda Item 10

## Service Improvement, Regeneration and Finance Work Plan 2023/24

<p><b>Meeting 1</b> Tuesday 10am 27 Jun 2023</p>	<p><b>Last meeting of Service Improvement and Finance</b></p> <ul style="list-style-type: none"> <li>• <b>Road Repairs</b> Cllr Andrew Stevens – Cabinet Member for Environment and Infrastructure Stuart Davies – Head of Highways and Transportation Bob Fenwick – Group Leader Highways Maintenance</li> </ul>
<p><b>Meeting 2</b> Tuesday 10am 11 July 2023</p>	<p><b>Last meeting of Development and Regeneration</b></p> <ul style="list-style-type: none"> <li>• <b>Focussed Topic: Project Review - Swansea Arena</b> Cllr Rob Stewart – Cabinet Member for Economy, Finance and Strategy Cllr Robert Francis-Davies - Cabinet Member for Investment, Regeneration &amp; Tourism Lee Richards – City Centre Team Leader /Lisa Mart – Venue Director</li> <li>• <b>Regeneration Programme / Project Monitoring Report</b> Cllr Robert Francis-Davies – Cabinet Member for Investment, Regeneration, Events &amp; Tourism Phil Holmes – Head of Planning and City Regeneration Huw Mowbray - Development and Physical Regeneration Strategic Manager</li> </ul>
<p><b>Meeting 3</b> Tuesday 10am 5 Sept 2023</p>	<ul style="list-style-type: none"> <li>• <b>Revenue Financial Outturn 22-23 and Revenue Outturn 22-23 (Housing Revenue Account)</b> Cllr Rob Stewart - Cabinet Member for Economy, Finance and Strategy Ben Smith – Director of Finance / S.151 Officer</li> <li>• <b>Annual Performance Monitoring Report 2022/2023</b> Cllr David Hopkins – Cabinet Member for Corporate Services &amp; Performance Richard Rowlands – Strategic Delivery &amp; Performance Manager</li> <li>• <b>Annual Review of Performance 2022/2023</b> Cllr David Hopkins – Cabinet Member for Corporate Services &amp; Performance Richard Rowlands – Strategic Delivery &amp; Performance Manager</li> </ul>
<p><b>Meeting 4</b> Tuesday 10am 26 Sept 2023</p>	<ul style="list-style-type: none"> <li>• <b>Capital Outturn and Financing 2022/23</b> Cllr Rob Stewart - Cabinet Member for Economy, Finance and Strategy Ben Smith – Director of Finance / S.151 Officer</li> <li>• <b>Quarter 1 2023/24 Performance Monitoring Report</b> Cllr David Hopkins – Cabinet Member for Corporate Services &amp; Performance Richard Rowlands – Strategic Delivery &amp; Performance Manager</li> </ul>
<p><b>Meeting 5</b> Tuesday 10am 17 Oct 2023</p>	<ul style="list-style-type: none"> <li>• <b>Audit Wales Report – Setting of Wellbeing Objectives</b> Cllr David Hopkins – Cabinet Member for Corporate Services &amp; Performance Richard Rowlands – Strategic Delivery &amp; Performance Manager</li> <li>• <b>Welsh Public Library Standards Annual Performance Report</b> Cllr Elliott King – Cabinet Member Culture, Human Rights and Equalities Karen Gibbins – Library Services Manager Bethan Lee – Principal Librarian</li> </ul>
<p><b>Meeting 6</b> Tuesday 10am 14 Nov 2023</p>	<ul style="list-style-type: none"> <li>• <b>Q1 Revenue and Capital Budget Monitoring Report – 2023/24</b> Cllr Rob Stewart - Cabinet Member for Economy, Finance and Strategy Ben Smith – Director of Finance / S.151 Officer</li> <li>• <b>Regeneration Project(s) Update – Skyline/Copr Bay</b> Cllr Robert Francis-Davies – Cabinet Member for Investment, Regeneration, Events &amp; Tourism Phil Holmes – Head of Planning and City Regeneration</li> </ul>
<p><b>Meeting 7</b> Tuesday 10am 12 Dec 2023</p>	<ul style="list-style-type: none"> <li>• <b>Mid Term Budget Statement 2023/24</b> Cllr Rob Stewart - Cabinet Member for Economy, Finance and Strategy Ben Smith – Director of Finance / S.151 Officer</li> <li>• <b>Review of Revenue Reserves</b> Cllr Rob Stewart - Cabinet Member for Economy, Finance and Strategy</li> </ul>

	<p>Ben Smith – Director of Finance / S.151 Officer</p> <ul style="list-style-type: none"> <li>• <b>Recycling and Landfill - Annual Performance Monitoring Report</b> Cllr Cyril Anderson– Cabinet Member Community Services Chris Howell – Head of Waste Management and Parks Matthew Perkins – Group Leader, Waste</li> <li>• <b>Audit Wales Report – Digital Strategy Review</b> Andrea Lewis – Cabinet Member for Service Transformation Sarah Lackenby – Head of Digital and Customer Services</li> </ul>
<p><b>Meeting 8</b> Tuesday 10am 16 Jan 2024</p>	<ul style="list-style-type: none"> <li>• <b>Budget Proposals 2024/25 – 2027/28</b> Cllr Rob Stewart - Cabinet Member for Economy, Finance and Strategy Ben Smith – Director of Finance / S.151 Officer</li> <li>• <b>Q2 Revenue and Capital Budget Monitoring Report 2023/24</b> Cllr Rob Stewart - Cabinet Member for Economy, Finance and Strategy Ben Smith – Director of Finance / S.151 Officer</li> <li>• <b>Q2 Performance Monitoring Report 2023/24</b> Cllr David Hopkins – Cabinet Member for Corporate Services &amp; Performance Richard Rowlands – Strategic Delivery &amp; Performance Manager</li> <li>• <b>Tourism Destination Management Plan Update</b> Cllr Robert Francis-Davies – Cabinet Member for Investment, Regeneration, Events &amp; Tourism Steve Hopkins – Tourism and Marketing Manager</li> </ul>
<p><b>Meeting 9</b> February 2024 Date TBC</p>	<ul style="list-style-type: none"> <li>• <b>Pre-Decision Scrutiny of Cabinet Reports: Annual Budget / Medium Term Financial Plan</b> Cllr Rob Stewart - Cabinet Member for Economy, Finance and Strategy Ben Smith – Director of Finance / S.151 Officer</li> <li>• <b>Q3 Revenue and Capital Budget Monitoring Report 2023/24</b> Cllr Rob Stewart - Cabinet Member for Economy, Finance and Strategy Ben Smith – Director of Finance / S.151 Officer</li> </ul>
<p><b>Meeting 10</b> Tuesday 10am 12 Mar 2024</p>	<ul style="list-style-type: none"> <li>• <b>Building Control Wales Audit Report and Building Safety in Wales</b> Cllr David Hopkins- Cabinet Member for Corporate Services &amp; Performance Peter Richards - Building Control, Bereavement and Registration Services Manager</li> <li>• <b>Regeneration Project(s) Update (To be decided)</b> Cllr Robert Francis-Davies – Cabinet Member for Investment, Regeneration, Events &amp; Tourism Phil Holmes – Head of Planning and City Regeneration</li> <li>• <b>Achievement against Corporate Priorities / Objectives / Policy Commitments for Development and Regeneration</b> Cllr Robert Francis-Davies – Cabinet Member for Investment, Regeneration, Events &amp; Tourism Phil Holmes – Head of Planning and City Regeneration</li> </ul>
<p><b>Meeting 11</b> Tuesday 10am 9 Apr 2024</p>	<ul style="list-style-type: none"> <li>• <b>Annual Review of Wellbeing Objectives and Corporate Plan</b> Cllr Rob Stewart - Cabinet Member for Economy, Finance and Strategy Cllr Andrea Lewis – Cabinet Member for Service Transformation Richard Rowlands – Strategic Delivery &amp; Performance Manager</li> <li>• <b>Q3 Performance Monitoring Report 2023/24</b> Cllr David Hopkins - Cabinet Member for Corporate Services &amp; Performance Richard Rowlands – Strategic Delivery &amp; Performance Manager</li> <li>• <b>Audit Wales Report – Use of Performance Information</b> Cllr David Hopkins - Cabinet Member for Corporate Services &amp; Performance Richard Rowlands – Strategic Delivery &amp; Performance Manager</li> </ul>



<p><b>Meeting 12</b> Tuesday 10am 7 May 2024</p>	<ul style="list-style-type: none"> <li>• <b>Planning Annual Performance Report</b> Cllr David Hopkins – Cabinet Member for Cabinet Member for Corporate Services &amp; Performance Phil Holmes – Head of Planning and City Regeneration Ian Davies - Development Manager Tom Evans – Place making and Strategic Planning Manager</li> <li>• <b>City Centre Retail</b> Councillor Rob Stewart – Cabinet Member for Economy, Finance &amp; Strategy Cllr Robert Francis-Davies – Cabinet Member for Investment, Regeneration, Events &amp; Tourism Paul Relf – Economic Development and External Funding Manager</li> </ul>
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**Welsh Housing Quality Standards Annual Update** – WHQS has now been achieved therefore there is no update for 23/24 however new WHQS standards are due end of 2024 therefore update on new standards can be given in 24/25.

**Annual Complaints Report** – Moved to SPC

**Welsh Language Standards Annual Report** – Moved to SPC