

Public Document Pack



Tuesday, 2 June 2026

Tel: 01993 861000

e-mail: democratic.services@westoxon.gov.uk

EXECUTIVE

You are summoned to a meeting of the Executive which will be held in Council Chamber, Council Offices, Woodgreen, Witney, Oxfordshire OX28 1NB on **Wednesday, 10 June 2026 at 2.00 pm.**



Phil Martin
Chief Executive

To: Members of the Executive

Councillors: Andy Graham, Duncan Enright, Sandra Coleman, Liz Leffman, Andrew Prosser, Geoff Saul, Alaric Smith, Tim Sumner and Alistair Wray

Recording of Proceedings – The law allows the public proceedings of Council, Executive, and Committee Meetings to be recorded, which includes filming as well as audio-recording. Photography is also permitted. By participating in this meeting, you are consenting to be filmed.

As a matter of courtesy, if you intend to record any part of the proceedings please let the Democratic Services officers know prior to the start of the meeting.

AGENDA

1. **Apologies for Absence**
To receive any apologies for absence from Members of the Executive. The quorum for the Executive is 3 Members.
2. **Declarations of Interest**
To receive any declarations of interest from members of the Executive on any items to be considered at the meeting.
3. **Minutes of Previous Meeting (Pages 5 - 20)**
To approve the minutes of the previous meeting, held on 11 March 2026.
4. **Receipt of Announcements**
To receive any announcements from the Leader of the Council, Members of the Executive or the Chief Executive.
5. **Participation of the Public**
Anyone who lives, works, or studies in West Oxfordshire is eligible to ask one question at the meeting, for up to three minutes, directed at the Leader of the Council or any Executive Member on any agenda item or on any issue that affects the district or its people.

All questions must be no longer than three minutes long.

Members of the public wishing to speak at a meeting must notify democratic.services@westoxon.gov.uk, or call Customer Services on 01993 861000 including their name and the agenda item or topic they wish to speak on, by 2.00pm two clear working days before the meeting (e.g. for a Wednesday meeting, the deadline would be 2.00pm on the Friday before).

If the topic of the question is not within the remit of the Council, advice will be provided on where best to direct the question.

The Leader or relevant Executive Member will either respond to a question verbally at the meeting or provide a written response which will be included in the minutes of the meeting.

6. **Reports from the Overview and Scrutiny Committee (Pages 21 - 24)**
To agree the response to recommendations from the Overview and Scrutiny Committee meeting on 26 March 2026 on Woodford Way and the Community Safety Partnership.
7. **Matters raised by Audit and Governance Committee**
To consider any matters arising from the Audit and Governance Meeting on 19 March 2026.
8. **Supporting Community Services - Crowdfunder UK Approach (Pages 25 - 36)**
Purpose
To review the proposed application and assessment processes, criteria and eligibility of the new grants scheme which is expected to be hosted by Crowdfunder UK; and to

update on the progress of commissioning Crowdfunder UK as the new host of the scheme.

Recommendations

That the Executive resolves to:

1. Approve the proposed application and assessment processes, criteria, eligibility and monitoring of the new grants scheme as set out in the report, and;
2. Delegate authority for award decisions to the Director of Place, in consultation with the Executive member for Stronger Healthier communities and the Executive member for Arts, Culture and Sport..

9. **Publica Business Plan 2026-28** (Pages 37 - 58)

Purpose:

To consider the Draft Publica Business Plan 2026-28, produced by the Publica Board in consultation with Directors and Shareholders, and to recommend that the Leader (as Shareholder Representative) approves the plan.

Recommendations:

That the Executive resolves to:

1. Endorse the Publica Business Plan 2026-2028
2. Request that the Leader, as shareholder representative, to recommend its adoption to the Board

10. **Ubico Business Plan** (Pages 59 - 86)

Purpose:

To consider the Ubico Business Plan 2026-27, which has been produced by Ubico in consultation with the Directors and Shareholders, and to recommend that the Leader (as Shareholder Representative) approves the plan.

Recommendations:

That the Executive Resolves to:

1. Note the Ubico Business Plan 2025-26; and
2. Note that, subject to feedback from the Executive, the Leader of the Council, as Shareholder Representative, will sign the written resolution to approve the Ubico Business Plan 2026-2027 in due course.

11. **2025/26 Quarterly Service Review Q4** (Pages 87 - 148)

Purpose

To provide details of the Council's operational performance at the end of 2025-26 Quarter Four (Q4).

Recommendation

That the Executive Resolves to:

1. Note the 2025/26 Q4 service performance report.

12. **Financial Performance Report 2025/26 Year End** (Pages 149 - 178)

Purpose:

To report the financial performance of the Council in 2025/26.

Recommendations:

That the Executive:

1. Note the 2025/26 financial performance;

2. Recommend to Council to carry forward the capital budget of £4,395,180. (Paragraph 5.2);
3. Recommend to Council to approve the transfers to and between Earmarked Reserves as detailed in the report (Section 4);
4. Recommend to Council to approve the necessary budget virements related to Publica Phase 2. (Paragraph 2.27).

13. **Discretionary Rate Relief Policy** (Pages 179 - 200)

Purpose:

To consider and approve amendments to the Discretionary Rate Relief Policy.

Recommendations:

That the Executive resolves to:

1. Approve the amendments to the Discretionary Rate Relief Policy ('the Policy') as detailed within the report;
2. Delegate to the Director of Finance, in consultation with the Executive Member for Finance, any future amendments to the Policy in respect of Electric Vehicle Charging Points and Electric Vehicle Forecourts.

14. **Procurement and Contract Management Strategy** (Pages 201 - 224)

Purpose

To present an updated draft Procurement and Contract Management Strategy.

Recommendation

That the Executive resolves to:

1. Approve the updated Procurement and Contract Management Strategy.

15. **Appointments to Outside Bodies 2026-28** (Pages 225 - 230)

Purpose

To provide a list of appointments to Outside Bodies for the civic year 2026/27.

Recommendation

That the Executive resolves to:

1. Note the appointments to outside bodies as set out in Annex A;
2. Recommend to Council to note the appointments to outside bodies as set out in Annex A.

(END)

WEST OXFORDSHIRE DISTRICT COUNCIL

Minutes of the meeting of the

Executive

Held in the Main Hall (Memorial Hall, Charlbury) - Charlbury Corner House and Memorial Hall at 2.00 pm on **Wednesday, 11 March 2026.**

PRESENT

Councillors: Andy Graham, Duncan Enright, Lidia Arciszewska, Hugo Ashton, Rachel Crouch, Andrew Prosser, Geoff Saul, Alaric Smith and Tim Sumner

Officers: Giles Hughes (Chief Executive Officer), Madhu Richards (Director of Finance), Andrea McCaskie (Director of Governance and Regulatory Services), Phil Martin (Director of Place), Claire Locke (Executive Director), Andrew Brown (Head of Democratic and Electoral Services), Anne Learmonth (Democratic Services Officer), Maria Harper (Democratic Services Assistant), Mathew Taylor (Democratic Services Officer), Tatiana Bell (Nature Recovery Officer), Alison Borrett (Senior Performance Analyst), Emma Cathcart (Head of Service, Counter Fraud and Enforcement Unit), Melanie Dodd (Senior Biodiversity Officer), Lucy Empson, Heather McCulloch (Community Wellbeing Manager), Gemma Moreing (Business Information and Performance Lead), Emma Tarry, Thomas See (Homeseeker Plus Lead) and Leighton Simmons (Senior Ecologist)

Other Councillors in attendance: Julian Cooper, Genny Early, Dan Levy, David Melvin and Elizabeth Poskitt

465 Apologies for Absence

There were no apologies for absence.

466 Declarations of Interest

8. West Oxfordshire Local Plan 2043 - Spatial Options Consultation Summary Report and Local Development Scheme (LDS) Update.

Councillor Duncan Enright, Declaration for Transparency, Councillor Duncan Enright, Deputy Leader, declared that he was a director of a company in the planning industry. The interest was declared in relation to item 8. Councillor Enright would leave the meeting for the duration of that item.

467 Minutes of Previous Meeting

There were no amendments to the minutes of the previous meeting held on 11 February 2026.

The approval of the minutes was proposed by Councillor Andy Graham, Leader of the Council.

Duncan Enright, Deputy Leader of the Council, seconded the proposal. The proposal was voted on and approved unanimously.

RESOLVED:

To approve the minutes of the previous meeting held on 11 February 2026.

468 Receipt of Announcements

Councillor Andy Graham, Leader of the Council, announced that there were two weeks remaining for participation in the public consultation on Local Government Reorganisation (LGR). There were three proposals for Oxfordshire and Councillor Graham encouraged all to take part and put their views across.

Councillor Andrew Prosser, Executive Member for Climate Action and Nature Recovery, announced that there on 21 March 2026 at 10:00am there was a Go Electric Oxfordshire EV charging event at the Woolgate car park in Witney. At the event there would be an opportunity to learn about a range of electric vehicles and charging solutions.

Councillor Rachel Crouch, Executive Member for Stronger Healthy Communities, announced that £5,000 of funding had been secured from Oxfordshire County Council, for Community Outreach Active Travel. This scheme was intended to encourage active travel in schools. A walking bus pilot was to be launched at Witney Community Primary School on 21 March 2026 at 8:00.

Councillor Lidia Arciszewska, Executive Member for Environment, announced that Food Waste Action Week was running from 9 to 15 March 2026 to raise awareness of the issues around food waste. Councillor Arciszewska gave the meeting detail of the cost of food waste in monetary and energy use terms. Residents of West Oxfordshire were encouraged to consider what they do with their food waste which was seen to be costly to the taxpayer to dispose of at an incinerator where instead it could have been used to generate electricity. Councillor Arciszewska encouraged the public to obtain a compost bin and food caddy from the Council which was free of charge.

Councillor Tim Sumner, Executive Member for Leisure and Carterton Area Strategy, announced the appointment of Michael Rich to a role to lead on the Carterton Area Strategy. Mr Rich would continue to build on the engagement work with communities and stakeholders that had taken place to date.

469 Participation of the Public

There was no participation of the public.

470 Reports from the Overview and Scrutiny Committee

The Executive noted that the Overview and Scrutiny Committee had met on 4 March 2026.

The comments made by the Committee had been circulated and published prior to the meeting. Full details could be viewed on the Council website.

The comments of the Overview and Scrutiny Committee in relation to Item 9 - National Planning Policy Framework: Proposed reforms and changes to the planning system were addressed as part of agenda Item 9.

471 Matters raised by Audit and Governance Committee

There had been no meeting of the Audit and Governance Committee since the last meeting of the Executive.

472 West Oxfordshire Local Plan 2043 - Spatial Options Consultation Summary Report and Local Development Scheme (LDS) Update

Councillor Duncan Enright, Deputy Leader of the Council, left the meeting at 2:11pm, and returned at 2:21pm, the duration of item 8, in light of his previously declared interest.

Councillor Hugo Ashton, Executive Member for Planning, introduced the item, the purpose of which was to consider the Local Plan Preferred Spatial Options Consultation Paper which was proposed to be published for consultation in accordance with Regulation 18 of the Town and Country Planning (Local Planning) (England) Regulations 2012.

In his presentation Councillor Ashton made the following points:

- The Council had recently completed the fourth round of public consultation which had been on spatial options.
- The report presented at the meeting was a summary of the feedback from that consultation. The report also contained an update on the Local Development Scheme.
- There had been 2,200 responses from 900 individuals to the draft spatial options consultation and Councillor Ashton considered this to be a successful engagement. The summary of the responses could be viewed in annex A to the report.
- Stakeholders had expressed support for the extension of the plan period to 2043.
- Stakeholders had questioned the categorisation of their settlements in the proposed settlement hierarchy. Many respondents had suggested changes to the categorisation. A number had suggested that there should be an additional tier of settlement introduced.
- The overall Spatial Strategy, that had focussed on principal settlements and well-connected locations, was generally well supported, with an important caveat that developments should be underpinned by the availability and delivery of infrastructure.

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- Some stakeholders had considered the scales of development proposed to be too restrictive, where others had felt more clarity was required to prevent cumulative expansion.
- Residents had expressed concern on the proposed allocations in terms of scale, impact on community, infrastructure and impact on heritage assets. However, some support for the sites was seen from developers.
- All of the consultation feedback received would be considered in the Regulation 19 Draft.
- There had been changes in the Local Development Scheme which had set out the timeframe for Local Plan documents to be produced. As a result of a two-stage Regulation 18 consultation there was a delay to the consultation on the Regulation 19 Draft Local Plan which would now take place in June 2026.

Councillor Ashton proposed the recommendations in the report.

Alternative options that were noted in the report were that the Council could have chosen not to progress with an update of the Local Plan. However, local authorities were required to keep plans up to date, typically reviewing them every 5-years or so.

Councillor Andy Graham, Leader of the Council, seconded the proposal and stated that the Local Development Scheme was published online and was made available in agreed deposit locations across the district. Councillor Graham noted the full consultation had taken place and Regulation 19 was the last chance to ensure robust policies were put in place to ensure developers could not exploit the new plan.

This was voted on and agreed unanimously.

The Executive resolved to:

1. Note the content of the report.
2. Agree that the Preferred Spatial Options Consultation Summary Report attached at Annex A be published online.
3. Agree that the updated Local Development Scheme attached at Annex B be published online and made available in hard copy format in agreed 'deposit' locations across the District.

473 National Planning Policy Framework: Proposed reforms and other changes to the planning system

Councillor Hugo Ashton, Executive Member for Planning, introduced the item, the purpose of which was to consider the Council's response to the Government's consultation on proposed changes to the National Planning Policy Framework (NPPF) and other aspects of the planning system.

In his presentation Councillor Ashton made the following points:

- The report had provided an overview of the consultation, highlighted the most significant proposals and changes and proposed the Council's response.
- The scale of the changes had taken many by surprise and was a comprehensive restructure and centralisation of policy formulation
- The District Council could have chosen not to respond to the consultation, however as a proactive Council it was felt necessary to try and influence the policies.
- The report and Annex A had been discussed at the recent Overview and Scrutiny Committee meeting, and the Committee's proposed responses and changes had been published on the Council's website and been very useful in the draft response.
- The consultation had been intended to conclude on 10 March 2026; however, the Council was able to put the response in on 13 March 2026 to take into account the comments at the Executive meeting.
- Councillor Ashton went on to summarise the key changes highlighted in the report, and the Council's position on the proposals in terms of those changes. Councillor Ashton focussed on the following areas: Plan-making; decision making policies; pre-application engagement; the ability to set local standards, such as was the case with the Salt Cross development; the use of settlement boundaries; reduced local control over large scale energy and infrastructure; the use of "permission in principle" on medium scale developments. Full detail was included in Annex A of the report.

Councillor Ashton proposed the recommendations in the report, with the additional second recommendation that had not been included in the published report as follows:

"Delegate authority to the Head of Planning in consultation with the Executive Member for Planning to finalise the consultation response and make amendments to address comments from the Overview and Scrutiny Committee and the Executive."

Councillor Andrew Prosser, Executive Member for Climate Action and Nature Recovery, suggested that there were some positive aspects to the proposals, however there were concerns about the centralisation of policies. Councillor Prosser queried if Government had addressed the housing numbers and targets in the proposed new framework. Councillor Ashton clarified that the housing targets had been made clear to be a minimum with no prospect of these being reduced.

Councillor Duncan Enright, Deputy Leader of the Council, welcomed that in the proposals certain elements of the planning system were being proposed to be standardised, particularly for smaller builders who worked across districts. Councillor Enright noted that in a rural district the "place" was important to ensure that that context was recognised in developments. Finally, Councillor Enright suggested that it was still difficult for young people in

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the district to get housing close to their networks and so the Local Plan produced by the Council should be well thought through and supported by the NPPF.

Non-Executive Members present suggested that the changes were significant and therefore encouraged cross-party representation to be made by the Council to the three Members of Parliament for West Oxfordshire. The members highlighted some of the flaws in the proposals that should be raised, these included the need for local representation, the removal of environmental protections which would impact the Salt Cross development among others, building near stations which was considered inappropriate in some rural settings and developers being enabled to buy out of their obligations around affordable housing and environmental provision.

Councillor Andy Graham, Leader of the Council, seconded the proposal and stated that, in light of the comments made by non-Executive members, he would commit to sending the response to Members of Parliament for West Oxfordshire and would raise the matter with them at his next regular meeting with them.

This was voted on and agreed unanimously.

The Executive resolved to:

1. Note the content of the report and agree that the suggested draft consultation response attached at Annex A is submitted to Government.
2. Delegate authority to the Head of Planning in consultation with the Executive Member for Planning to finalise the consultation response and make amendments to address comments from the Overview and Scrutiny Committee and the Executive

474 Approach to commissioning 3 year SLA 2027 onwards

Councillor Rachel Crouch, Executive Member for Stronger Healthy Communities, presented the item, the purpose of which was to outline the principles, application process and timeline for the commissioning of three-year Service Level Agreements for Community Grants covering the period 2027-2030.

In her presentation Councillor Crouch raised the following points:

- In November 2025 the Executive had agreed to commission a further 3-year Community Grants Programme with a base budget of £396,000.
- The new Community Grants Programme needed to be commissioned before current agreements ended in March 2027 and needed to be in place by April 2027.
- The programme would use the procurement framework with an emphasis on measurable outcomes and alignment with Council priorities.
- Applications for grants would open in June to September 2026.

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- Funding decision would be made in November 2026.
- The programme would focus on: Climate resilience; Nature recovery and Community wellbeing.
- The maximum award was £30,000 per application, with up to two applications allowed per organisation.
- There was an assessment panel for the applications that would prioritise: partnership working, evidence of need, multi-focused delivery, inclusivity, climate and nature co-benefits and deliverability.
- The current base budget had been considered insufficient to meet expected demand and the proposals would increase the budget by £53,000 per annum, which meant a £555,000 programme over the three-year period.

Councillor Crouch then proposed the recommendations in the report.

The alternative options detailed in the report were that the timeframe could have been contracted as at the moment it is very generous. Options could have included opening the programme to applications later in the year, reducing the application window, shortening the assessment and decision-making period, or providing applicants with less notice of funding outcomes. However, the Council's preference was to retain a generous timeline at this stage that allowed for unexpected developments and competing demands on time. The Procurement team had confirmed that the proposed timeframe was both achievable and preferable. The number of Lots could also have been adjusted, either reduced or increased. The Council's preference was to maintain multiple focus areas, as this is likely to have made the programme more relatable and accessible to a wider range of potential applicants across different sectors.

Councillor Alaric Smith, Executive Member for Finance, seconded the proposal and stated that he considered it important to ensure that this work would continue in light of Local Government Reorganisation.

This was voted on and agreed unanimously.

The Executive resolved to:

1. Approve the principles and timeline as set out in Sections 3 and 4.
2. Agree an increase to the Base Budget of £53k per annum as part of the 2027-2028 budget setting process, and for subsequent years, bringing the total budget available to £555k over three years.
3. Delegate authority for oversight of the commissioning process to the Director of Place, in consultation with the Executive Member for Stronger Healthier Communities.

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Councillor Andrew Prosser, Executive Member for Climate Action and Nature Recovery, presented the item, the purpose of which was to consider the West Oxfordshire District Council Biodiversity Duty Report, which must be published by the Council before 26 March 2026.

In his presentation Councillor Prosser made the following points:

- The Duty Report was a new requirement on Local Authorities to demonstrate actions that they had taken to support biodiversity and nature recovery in their areas.
- It was appropriate that the meeting was taking place in Charlbury which was an area well known for its work in supporting nature.
- The Council had put in place a Nature Recovery Plan to 2030 three years ago to show what actions it would take to support biodiversity and nature. The report showed where the Council was in terms of this plan.
- The importance of the work was highlighted. It was estimated that 50% of biodiversity had disappeared in the country since the industrial revolution. The challenges in this area were very large but important.
- The Council had strengthened its partnerships with local organisations to support managing land to enhance value for wildlife.
- Officers had worked to embed the Biodiversity Net Gain Duty on developers.
- The Council had installed wildlife features at offices and supported other landowners to do this also.

Councillor Prosser proposed accepting the recommendations of the report.

As the Biodiversity Duty Report must have been published in order to comply with the statutory requirement under the Environment Act 2021 there were no alternative options outlined in the report.

Councillor Lidia Arciszewska, Executive Member for Environment, seconded the proposal.

This was voted on and agreed unanimously.

The Executive resolved to:

1. Note the content of the West Oxfordshire Biodiversity Duty Report attached at Annex A; and
2. Agree that the report be published before 26 March 2026 in accordance with legislative requirements.

476 HomeseekerPlus Policy Review

Councillor Geoff Saul, Executive Member for Housing and Social Care, presented the item, the purpose of which was to review the HomeseekerPlus Policy.

In his presentation Councillor Saul made the following points:

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- HomeseekerPlus was the choice based- lettings system used jointly by the seven councils across Gloucestershire and West Oxfordshire. It had been in place since 2016 and was last reviewed in 2022. Since then, changes in legislation, alongside operational learning, had meant that the policy now needed to be updated.
- The aim of this review was to ensure the policy remained fair, transparent, and legally compliant, and that it would continue to prioritise those most in need of affordable housing.
- The Key changes to the policy were:
- Qualification Criteria: The financial assessment had been updated so that it now also considered whether a resident had sufficient resources to access housing across different tenures. Where an applicant had deliberately worsened their housing circumstances, they would now be placed in the lowest priority band for six months and could only move up if they had taken reasonable steps to improve their situation. Local connection through employment would now apply only to the main or joint applicant (unless there are exceptional circumstances), which brought consistency across all partners. The Council was consulting on options to expand local connection for Armed Forces personnel and veterans.
- Assessment and Banding: Applicants would only receive higher banding where they had acted on reasonable professional advice — for example advice about preventing homelessness through working with Environmental Services, Landlords or medical professionals. Emergency priority for downsizing would now only apply where releasing the property had met a clearly identified demand, rather than being automatic. Fixed, six-month periods where banding may be reduced if an applicant does not act with urgency were being introduced. Two new criteria were added for bedroom need: where a couple could not share due to medical reasons, and where an applicant was in the third trimester of pregnancy.
- A four-week public consultation would commence in May 2026 which would allow residents, housing associations, voluntary organisations and other stakeholders to comment on the proposed changes.

Councillor Saul proposed accepting the recommendations of the report.

As there was a requirement to ensure an open, transparent and fair process to changes in Policy there were no other alternative options detailed in the report.

Councillor Andy Graham, Leader of the Council, seconded the proposal and noted that there would be a consultation on the proposals and communications would be made to highlight how the public could take part.

This was voted on and agreed unanimously.

The Executive resolved to:

1. Approve the draft Policy for public consultation

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2. Delegate authority to the Business Manager Housing in consultation with Executive Member for Housing and Social Care and Publica Executive Director – Operations to adopt the new policy following consideration of the consultation results

477 Kilkeny Car Park

Councillor Lidia Arciszewska, Executive Member for Environment, presented the item, the purpose of which was to add Kilkeny Car Park to the West Oxfordshire District Council (Off-Street Parking Places) Order.

In her presentation Councillor Arciszewska advised that the Kilkeny Car Park was a Council owned car park, and it had been suggested that this should now be brought in line with the management of other Council owned car parks by adding it to the Parking Order. This action was in response to issues with the use of the car park in 2025 with which residents had been unhappy.

Councillor Arciszewska proposed accepting the recommendations of the report.

The alternative options detailed in the report were that the Council could have chosen not to include the car park in the Parking Order and continue to have little or no regulations at the site and rely on ownership rights.

Councillor Andrew Prosser, Executive Member for Climate Action and Nature Recovery, seconded the proposal.

This was voted on and agreed unanimously.

The Executive resolved to:

1. Add the Kilkeny Car Park to the West Oxfordshire District Council (Off-Street Parking Places) Order ('the Parking Order') to enable the Council to regulate and manage the use.
2. Delegate authority to the Executive Director for Corporate Services in consultation with the Executive Member for Environment to consider consultation feedback received in respect of the proposed amendments to the Parking Order and decide whether to make the variation to the Parking Order in whole or in part or to abandon the proposal.

478 Corporate Enforcement Policy

Councillor Andy Graham, Leader of the Council, presented the item, the purpose of which was to present the Executive with a revised Corporate Enforcement Policy ('The Policy') for approval and adoption.

West Oxfordshire District Council ('the Council') was required to have an effective Corporate Enforcement Policy that enabled Officers to investigate and take action to ensure individuals and businesses complied with the law. The Policy set out the legislative framework and principles the Council would abide by when undertaking investigations to mitigate the risk

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of legal challenge in Court. The Policy demonstrated the Council's consideration of necessity, proportionality and public interest when deciding on enforcement action and demonstrated openness and transparency for residents, Councillors and employees.

Councillor Graham noted that the policy had been reviewed by the Counter Fraud and Enforcement Unit who had consulted with the enforcement lead officers across the Council. The policy was overarching and acted as the Council's prosecution policy however various service areas who had responsibility for enforcement had much more detailed enforcement policies and procedures relating to their areas legislation and approach. Councillor Graham noted that only minor changes to most of the policy were needed with the more significant amendments in the service area sections which included more detail.

Councillor Graham proposed accepting the recommendations made in the report.

The report noted that there were no alternative options available to the Executive in this case.

Councillor Duncan Enright, Deputy Leader of the Council, praised the Council for having a lean approach to enforcement, which included the Audit and Governance Committee and the teams that supported this, including the Counter Fraud and Enforcement Unit.

Councillor Alaric Smith, Executive Member for Finance, seconded the proposal and noted that this was a key policy to ensure that the Council could undertake necessary enforcement action.

This was voted on and agreed unanimously.

The Executive resolved to:

1. Approve and adopt the Corporate Enforcement Policy attached to this report as Annex A.
2. Delegate authority to the Director of Governance and Regulatory Services to approve future minor amendments to the Policy, in consultation with the Leader of the Council, Head of Service Counter Fraud and Enforcement Unit, Relevant Heads of Service and the Head of Legal Services.

479 Quarterly Finance Review Q3

Councillor Alaric Smith, Executive Member for Finance, introduced the item, the purpose of which was to detail the Council's financial performance for Quarter Three 2025-2026.

In his presentation Councillor Smith highlighted the following points:

- At the end of Quarter three there was a cost-of-service underspend of £630,078.
- The key factors contributing to the position were, additional income from Trade Waste, Development Management and the leisure contract.

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- There were no significant overspends to report for Quarter Three.
- Investment income was better than budget due in the main to interest rates falling more slowly in the last year than had been anticipated at 2025/26 budget setting. The year end forecast was for an additional £596,000 of investment income above budget.
- In terms of the Capital Programme, there were a number of projects ongoing that included, repairs at The Old Court, Chipping Norton Leisure Centre and Carterton Industrial Estate.
- There was an underspend on the replacement waste fleet which had been rolled into a full waste vehicle strategy which should generate savings.
- The Council was acquiring properties in the district for emergency accommodation, and advance negotiations were ongoing for a further six properties to be acquired.
- The Witney PSDS project was now in the construction phase and had an estimated completion of March 2026.
- S106 contributions had resulted in £1.6m distributed to Town and Parish Councils for projects.

Councillor Smith proposed accepting the recommendations in the report.

There were no alternative options detailed in the report.

Councillor Andy Graham, Leader of the Council, seconded the proposal.

This was voted on and agreed unanimously.

The Executive resolved to:

1. Note the Council's Financial Performance for Quarter Three 2025-2026
2. Delegate authority to the Director of Finance, in consultation with the Executive Member for Finance, to review earmarked reserves to mitigate against the financial risks identified in this report. See Sections 2.21 – 2.24.

480 Quarterly Service Review Q3

Councillor Andy Graham, Leader of the Council, presented the item, the purpose of which was to provide details of the Council's operational performance at the end of 2025-26 Quarter Three (Q3).

Councillor Graham summarised several of the key aspects of the report as follows:

- Overall performance for the Council had been positive for Quarter Three.
- Westhive Round 5 had finished and had provided funding for ten new community projects.
- Lettings at Marriotts Walk had continued, with agreements having been secured for three Units alongside ongoing work on public realm design. This was significant progress when compared to other towns across the country who were struggling.
- The Windrush Leisure Centre decarbonisation project had continued to progress with installation of the new low-carbon heating system and removal of the asbestos boiler.

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- Market town support had continued, with fourteen Shop Front Improvement Grants that were on track for award with further grants expected to assist up to nineteen local businesses. Markets in Witney and Chipping Norton had continued to be successful.
- Planning applications determined within agreed timescales had continued to exceed targets and planning appeals had come back under target in the quarter.
- Customer Service satisfaction had continued to be strong and the average wait times had improved by around forty-five seconds compared to last year.
- Visits to the leisure centres and gym memberships had remained high, with memberships exceeding the target by just over 11% and visits exceeding the target by around 32%.
- Councillor Graham acknowledged that some service performance had not hit targets and there was work to be done on these areas.

Councillor Graham proposed accepting the recommendations of the report.

There were no alternative options detailed in the report.

Councillor Tim Sumner, Executive Member for Leisure and Carterton Area Strategy, seconded the proposal.

This was voted on and agreed unanimously.

The Executive Resolved to:

1. Note the 2025/26 Q3 service performance report.

481

Review of Publica Members Agreement and Service Specifications

Councillor Andy Graham, Leader of the Council, presented the item the purpose of which was for the Executive to consider proposals for amendments and an extension to governance arrangements following the conclusion of the Publica Review. This included the updating of service specifications, service agreements, the members agreement and articles of association.

Councillor Graham made the following key points in his presentation:

- There had been significant changes to Publica in the last few years following the Publica Review and the return of some services to the Council.
- There had also been changes to the company board structure with new Non-Executive Directors having been appointed including council officer representation, and a slimmed down Publica Executive structure that reflected the reduced service provision to partners.
- The changes to governance arrangements and service specification were set out in the report. There were minor changes to the Articles of Association and Members Agreement to ensure provisions were up to date, relevant and clear. There were more significant changes to the Service Specification, with the merging of three separate service specifications into one and a reduction in services provided by Publica as some

had transferred back to the Councils. It also provided one single agreement end date of 31 October 2030 that provided continuity should any new unitary authority want to continue with the model, or undertake a phased shutdown, whilst retaining flexibility for termination earlier, if necessary.

- Once approved, the changes to the Articles of Association, Members Agreement and Service Specification would be legally enacted through deeds of variation to the original documentation.

Councillor Graham proposed accepting the recommendations in the report.

Alternative options detailed in the report were that the council could have continued to operate the arrangements with Publica under side letter, however this would have failed to provide clarity of revisions to roles and responsibilities and the service specification after the Publica Review.

Councillor Duncan Enright, Deputy Leader of the Council, seconded the proposal.

This was voted on and agreed unanimously.

The Executive resolved to:

1. Approve in principle the changes to the governance agreements set out in section 3 below.
2. Delegate authority to the Chief Executive, in consultation with the Leader, to finalise and enact through appropriate legal documentation, the detailed changes to the agreements, in line with principles agreed.

482 Ubico Service Agreement

Councillor Andy Graham, Leader of the Council, presented the item the purpose of which was to move to a single, common service agreement to be adopted by all Ubico shareholder councils and effective from April 2027, with council-specific service specifications appended.

Councillor Graham stated that this approach would secure the delivery of service beyond the current contract end date in March 2027, retain local flexibility over service scope and standards and introduce consistency in legal structure, definitions, and core contractual provisions across the Ubico Shareholding partnership. The proposed agreement had updated terminology, reflected legislative change, standardised notice periods, and included specific provisions to ensure continuity of services in the event of local government reorganisation. Importantly, it did not change the Shareholder Agreement or the Council's role as an owner of Ubico. Adoption of the common Service Agreement would provide greater clarity, resilience and long-term planning certainty while retaining strong council control over service scope, cost and performance, within the existing shareholder governance framework.

Executive

11/March2026

Councillor Graham proposed accepting the recommendations in the report and reminded those attending that there were mechanisms available to make complaints and comment on the services provided by Ubico.

Alternative options detailed in the report included: Do nothing – Retain the existing WODC-specific agreement. This would have perpetuated inconsistency across shareholders and required a separate renegotiation for WODC by March 2027. Re-procure services externally. This would have introduced significant cost, risk and service disruption. Neither alternative option was recommended.

Councillor Lidia Arciszewska, Executive Member for Environment, seconded the proposal.

This was voted on and agreed unanimously.

The Executive resolved to:

1. Approve the Ubico Service Agreement in principle.
2. Delegate authority to Director of Place in consultation with The Leader of the Council, to:
 - a. Agree and approve the final wording of the Service Agreement before the current contract expires at the end of March 2027.
 - b. Agree and approve the final wording of the Lease Agreement
 - c. Agree and approve the updated Service Specification

483 Response to government consultation on local government reorganisation in Oxfordshire

Councillor Andy Graham, Leader of the Council, presented the item the purpose of which was to seek delegated authority for the Chief Executive, in consultation with the Leader of the Council, to submit a response to the Government's statutory consultation on the three proposed options submitted for Local Government Reorganisation for Oxfordshire and West Berkshire.

Councillor Graham reminded the meeting that he had alluded to the three structures proposed for a new Unitary Council in his earlier announcement and proposed accepting the recommendation of the report.

The alternative options detailed in the report were that the Executive could have decided not to submit a consultation response to the statutory consultation for Local Government Reorganisation in Oxfordshire and West Oxfordshire. To do so would have been inconsistent with the formal decisions taken in November 2025 to support and submit the proposal for a two unitary model for Local Government Reorganisation in response to the Secretary of State's formal invitation to do so.

Councillor Duncan Enright, Deputy Leader of Council, seconded the proposal.

Executive

11/March2026

This was voted on and agreed unanimously.

The Executive resolved to:

- I. Delegate authority to the Chief Executive Officer, in consultation with the Leader of the Council, to submit a response to the Government's statutory consultation on Local Government Reorganisation for Oxfordshire and West Berkshire on behalf of West Oxfordshire District Council.

The Meeting closed at 3.23 pm

CHAIR



Executive response to recommendations on from the Overview and Scrutiny Committee on 26 March 2026 on Woodford Way

Recommendation	Agreed Y / N?	Comment	Responsible Executive Member (name, title)	Lead Officer (name, title)
1. That officers bring up to date parking data forward to the Committee, including ANPR data over a representative two-week period, with the next report.	N	Officers have detailed data for the Marriotts Walk multi-storey car park and can include this in the next report. There is no ANPR data for the other Car parks in Witney, however Officers are currently looking at the feasibility and costs associated with introducing the relevant equipment to do this.	Councillor Geoff Saul, Executive Member for Housing and Social Care	Phil Martin, Director of Place (Chief Executive from 1 June 2026)
2. That the Council undertakes a two-week trial partial closure of the number of spaces proposed to be lost at Woodford Way under the proposals to better understand the impact on parking across Witney.	N	As this would only provide data for an isolated period, so not being representative of usage throughout the year, the disruption to residents would outweigh the benefit of undertaking this trial.		
3. That officers work up an “option 4” design which preserves more car parking at the south of the site.	N	Work continues on the design for the site to create an optimum scheme that ensures the best use of the space available.		
4. That a separate full report on displaced parking and the impact on wider area be brought to the Committee.	N	There will not be a separate report but the next update report to the Committee will include the displacement of cars and the impact of this.		
5. That additional parent and toddler parking spaces be incorporated into plans for the site.	Y	The inclusion of Parent and toddler parking spaces can be explored in the final design. It is important to note that at this point in time there aren't any parent and toddler parking spaces in the Woodford Way Car Park.		


6. That the Council updates the timings for parking in the Marriotts Walk multistorey car park to an all-day provision prior to commencement of the development.	Y	The Council is actively working on increasing the time periods for parking bays on the upper desks of the Marriotts Walk multistorey car park to provide an all-day provision prior to commencement of the development.		
7. That officers bring a further update report to the Committee prior to the planning application for the site.	Y	A report will be brought to Committee prior to a formal planning application being submitted for the site.		

Executive response to recommendations on from the Overview and Scrutiny Committee on 26 March 2026 on the Community Safety Partnership

Recommendation	Agreed Y / N?	Comment	Responsible Executive Member (name, title)	Lead Officer (name, title)
1. That officers assess which priority projects would be affected by the budget reduction from the Police and Crime Commissioner, and the Executive consider whether any of these priority projects can be funded by the Council's own discretionary resources.	Y in part	OCC met with all CSP's and funded services on 15 th April to discuss the end of year outturn and agree an approach to applying the 40% reduction in OPCC funds in Year 3 of the grant agreement. Work has been done to negotiate reductions for projects where possible on a case by case basis – thus avoiding a blanket reduction in all areas. However some activity is recommended not to receive any funding in 2027/28. These elements are: Nightsafe Manager role (countywide) hosted by TVP (circa £56k); Violence Against Women and Girls role (countywide) hosted by TVP (formerly Public health) (circa £56k); and the Chelsea's Choice theatre performances in schools about child sexual exploitation (circa £20k).	Councillor Geoff Saul, Executive Member for Housing and Social Care	Heather McCulloch, Community Wellbeing Manager
2. That officers' assessment of the impacts of the cuts to funding on priority projects details the impact in terms of the loss of officer roles rather than just cash values.	Y	It has been a tough balance to strike. The NightSafe managers main focus is on Oxford City where most activity and issues remain. Residents from across the county congregate		

		<p>on the city – so it cannot be said that the role only works with City residents but this may be a perception. The VAWG role is starting to explore activities to support residents directly in West Oxfordshire and we certainly hope to see this develop over the coming year. It's early days to be able to say how significant the impact of the loss of this role would be to WODC residents. Chelsea's Choice workshops are being offered to schools in West Oxfordshire currently with some take up and we hope that over the course of this year we can see schools make good use of the free opportunities.</p>		
<p>3. That the Council writes to Thames Valley Police and Crime Commissioner to request that they reinstate funding being cut from the CSP.</p>	Y	<p>The funding comes to the top tier authority. A CSP is required to sponsor each proposal for funding. CSP managers review all proposals before submitting them to the OPCC for approval. West Oxfordshire CSP is currently benefitting from a number of countywide roles and services rather than receiving funds directly for WODC only projects. The Council will draft a letter to the PCC requesting they reinstate the funding levels.</p>		

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 <p>WEST OXFORDSHIRE DISTRICT COUNCIL</p>	<p>WEST OXFORDSHIRE DISTRICT COUNCIL</p>
<p>Name and date of Committee</p>	<p>EXECUTIVE – 10 JUNE 2026</p>
<p>Subject</p>	<p>SUPPORTING COMMUNITY SERVICES – CROWDFUNDER UK APPROACH</p>
<p>Wards affected</p>	<p>All</p>
<p>Accountable member (Joint)</p>	<p>Tim Sumner, Executive Member for Arts, Culture and Sport Email: tim.sumner@westoxon.gov.uk Sandra Coleman, Executive Member for Stronger Healthy Communities Email: sandra.coleman@westoxon.gov.uk</p>
<p>Accountable officer</p>	<p>Phil Martin, Director of Place Email: phil.martin@westoxon.gov.uk</p>
<p>Report author</p>	<p>Heather McCulloch, Community Wellbeing Manager Email: heather.mcculloch@westoxon.gov.uk</p>
<p>Summary/Purpose</p>	<p>To review the proposed application and assessment processes, criteria and eligibility of the new grants scheme which is expected to be hosted by Crowdfunder UK; and to update on the progress of commissioning Crowdfunder UK as the new host of the scheme.</p>
<p>Annexes</p>	<p>Annex A – Sustainability Impact Assessment Tool</p>
<p>Recommendation(s)</p>	<p>That the Executive resolves to:</p> <ol style="list-style-type: none"> 1. Approve the proposed application and assessment processes, criteria, eligibility and monitoring of the new grants scheme as set out in the report, and; 2. Delegate authority for award decisions to the Director of Place, in consultation with the Executive member for Stronger Healthier communities and the Executive member for Arts, Culture and Sport.
<p>Corporate priorities</p>	<ul style="list-style-type: none"> • Putting Residents First

	<ul style="list-style-type: none"> • A Good Quality of Life for All • A Better Environment for People and Wildlife • Responding to the Climate and Ecological Emergency • Working Together for West Oxfordshire
Key Decision	YES
Exempt	NO
Consultees/ Consultation	None.

1. EXECUTIVE SUMMARY

- 1.1 This report sets out the proposed application and assessment processes, criteria and eligibility of the new grants scheme which is expected to be hosted by the Crowdfunder UK platform. Furthermore, it provides an update on the progress of commissioning Crowdfunder UK as the new host of the scheme.

2. BACKGROUND

- 2.1 The Council entered into a 3 year contract with Spacehive in 2023/24. This contract ends on 30th April 2026. The Council distributed funding from the main Westhive fund through this vehicle. The annual budget for the scheme was £120,000.
- 2.2 The Council previously operated 2 main grant schemes – the Community Facilities Grant (CFG) and the Community Revenue Grant (CRG). In the most recent grants review the CFG which was focussed on community infrastructure capital projects such as village halls and sports facilities, was found to be regularly remaining unspent. The CRG was a fully committed revenue stream. It was found to provide very limited access each year to new applicants.
- 2.3 On the 17th December 2025 Executive agreed not extend the contract with Spacehive. It was agreed to pursue entering into an agreement with Crowdfunder UK to host a funding platform for 3 years from 2026/27 onwards. Furthermore, it was agreed to make provision in budget setting for platform hosting fees.
- 2.4 The main advantages of Crowdfunder UK over Spacehive are as set out below:

Crowdfunder UK	Spacehive
0% platform fees for not-for-profit groups	7.5% platform fees for not-for-profit groups
£46,000 hosting charge to the Council over 3 years	£110,000 hosting charge to the Council over 3 years
Added exposure to other grants available on the platform	
Stripe account fees of 2.4% plus 20p per pledge	

- 2.5 Officers were asked to design the criteria and application process for the scheme and progress the procurement of Crowdfunder UK, reporting back to Executive.

3. MAIN POINTS

- 3.1 We know that sustainable change starts in communities. When locally led, innovative solutions are backed with the resources they need, they have the best chance to make the greatest impact.
- 3.2 Officers are recommending that the Council moves away from using the Westhive name to emphasise a fresh start, updated criteria and a new approach.
- 3.3 The new fund, delivered through Crowdfunder UK, will provide grants for projects that support communities across West Oxfordshire. It will continue to help bring locally led

ideas to life by combining support from residents, organisations and the Council. The fund will focus on projects that improve wellbeing, actively improve and protect the local environment, and strengthen community resilience.

- 3.4** The priorities for the fund will continue to align with Council priorities:
- ✓ Community Wellbeing – reducing health inequalities and creating more connected communities to enable people to enjoy a better quality of life
 - ✓ Climate Resilience – achieving a reduction in carbon emissions and creating sustainable communities that are resilient to climate impacts, primarily flooding, extreme heat, and drought.
 - ✓ Nature Recovery – enhancing the natural environment to increase biodiversity, alongside providing wider opportunities for people to access it and understand its value.
- 3.5** A budget of £120,000 per year is available. Projects will be able to apply for a pledge of up to 50% of the total project cost, or maximum of £12,000, whichever is the lower amount.
- 3.6** The aim is to provide two application windows in 2026.

4. CRITERIA AND ELIGIBILITY

4.1 Organisations will be deemed eligible to apply on the following basis:

Eligible	Ineligible
Charities - registered and excepted	Town and parish councils
Charitable Incorporated Organisations	Exempt charities
Community Interest Companies (CICs)	Social Enterprises
Constituted Voluntary Groups	Private companies
Community Benefit Society *	Statutory service providers
	Groups proposing for-profit projects
	Groups proposing projects with a political affiliation
	Schools will generally not be supported unless it can be demonstrated that the proposed project will have a demonstrable benefit to the wider community.
	Faith-based organisations will only be supported where it can be demonstrated that the activity will have no religious or missioning component and so long as the activity is inclusive.

- 4.2** Eligible organisations will be required to:
- Deliver work for the benefit of people who live in West Oxfordshire.
 - Have a governing body (trustees or directors) of at least three unrelated individuals.
 - Be inclusive and accessible in terms of recruitment, governance and delivery.
 - Be able to provide the following documentation and evidence of their organisation’s eligibility:
 - Governing documents (such as constitution or Memorandum & Articles of association);

- Bank account in the name of the organisation, with two separate signatories
- Published accounts to demonstrate the organisation is over 12 months old; and
- Safeguarding and/or child protection policies where relevant.

4.3 Both Revenue and Capital costs will be eligible.

- Revenue costs: One-off costs associated with the direct delivery of a project. Staff costs where they are directly related to the project will be eligible. Feasibility studies will not be eligible.
- Capital costs: One-off costs associated with the refurbishment of a building or the purchase of equipment.

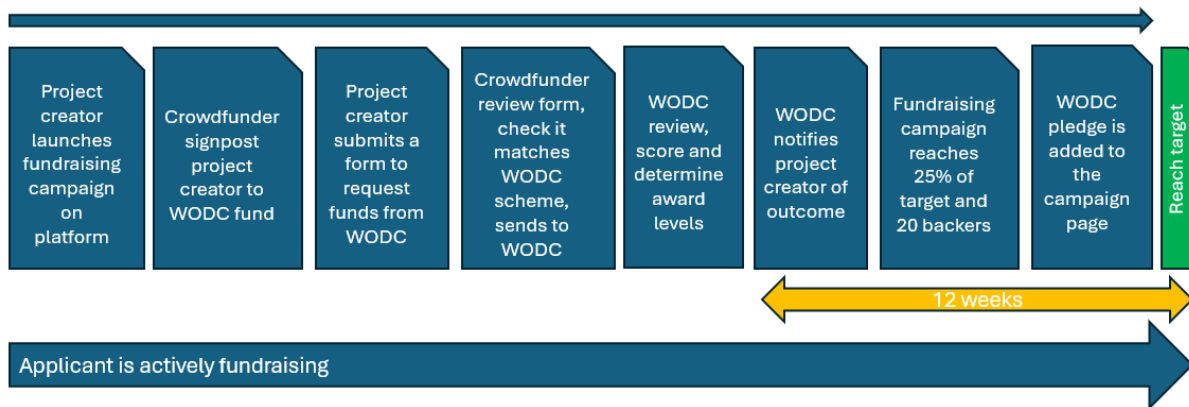
4.4 The following types of requests will not be eligible for support from the Council:

- Contributions to general appeals or circulars
- Activities where the primary benefit is the advancement of religion
- Activities where the primary benefit is to enable a public body to conduct its statutory obligations
- Activities where the primary benefit is the advancement of animal welfare
- Activities which have already taken place or costs that have already been incurred
- Grant-making or equivalent gifts in kind by other organisations (although we can fund provision of necessary goods for a service e.g. food parcels or activity packs)
- Changes to land/buildings that do not belong to the applicant
- Large-scale construction projects (including fixed structures e.g. playgrounds) with a total value over £100,000. This is due to the fact that these projects take a significant amount of time to reach their target and this can be difficult to manage in year.
- Feasibility studies
- Costs which can more appropriately be met through the precept.

4.5 All payments will be handled securely through Stripe. During project setup, each organisation connects its own Stripe account to manage transactions. Projects can run on an 'all or nothing' or 'keep what you raise' model, determining whether funds are released or refunded if targets are not met.

5. PROCESS FOR THE PROJECT CREATORS (APPLICANTS)

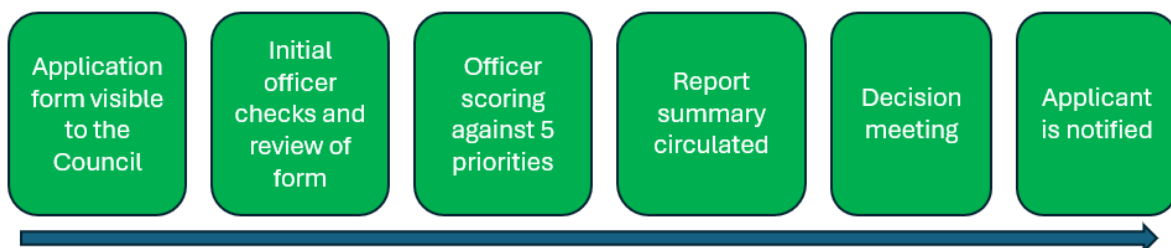
5.1 The process for project creators will be as follows:



- 5.2 Crowdfunder UK will pro-actively alert projects who are actively fundraising on the site. A very simple application form will be completed by the project creator and submitted to the Council via Crowdfunder UK who will review it against the Council criteria and eligibility.
- 5.3 Once approved the form will be visible to the Council via our Crowdfunder UK dashboard and officers will complete further checks before putting suitable bids forward for assessment and decision.
- 5.4 Once the outcome is known, project creators will be notified of the pledge. The pledge will be valid for 12 weeks after the date of the Award Agreement. If the project creator has not met the target within 12 weeks, the offer of the pledge may be withdrawn, however, project creators may request an extension to their campaign deadline. These will be considered on a case-by-case basis, recognising that there may be circumstances where a longer timeframe is needed to reach their target.
- 5.5 Project creators will need to reach 100% of their campaign fundraising target to receive the funds from the Council. At this point the pledge converts to an award.
- 5.6 If a project creator does not reach 100% of the campaign fundraising target the pledge will be cancelled.
- 5.7 Applicants should be actively crowdfunding to achieve the best results. The pledge from the council is designed to create energy in the campaign, to give the applicant a boost at a critical stage, encouraging supporters to back the project and reach the fundraising target.
- 5.8 There is no fee charged to project creators for using the platform. There are small costs associated on transactions which are levied by Stripe.

6. DETERMINING AN AWARD

6.1 Each application will be considered as follows:



6.2 If an application meets the criteria, it does not guarantee that an award will be granted. Officers will consider each application and score against a suite of 5 priorities. This will enable officers to prioritise funding to projects which align most strongly with the values of the funding scheme. The 5 priorities are as follows:

- Council priorities
- Local need
- Degree of community benefit
- Partnership arrangements
- Value for money

6.3 It is proposed that the decision making is delegated to the Director of Place in conjunction with the Executive member for Stronger, Healthier Communities. This is a change to the previous arrangement. Prior to this meeting a report will be shared with the Leader of the Council and Executive members for Finance, Environment and Climate to enable comments and representation to be made. The Decision will be made at the meeting itself where possible, unless further information is required.

7. MONITORING AND EVALUATION

7.1 The Community Funding Officer will oversee the following process of evaluation and monitoring:

- A check in with the project creator 6 months after the campaign closes to review progress.
- An Impact report to be submitted by the project creator within 12 months of reaching the campaign target
- Produce an annual summary of projects supported and their impacts.

8. COMMISSIONING OF CROWDFUNDER UK

8.1 We are currently working through the process to procure Crowdfunder UK utilising the GCloud procurement framework. Procurement and Legal services teams are providing support.

8.2 We hope to commence the 3-year contract on 1st June 2026. Onboarding will be complete within 3 months of the contract start date.

8.3 The cost to the Council of Crowdfunder UK providing this service is £15,600 per annum for the duration of the contract. The costs are broken down as follows:

- Crowdfunder Connect Licence Fee (Hosted) for one fund £12,000
- Additional Fund distribution and enhanced verification service £3,600

9. ALTERNATIVE OPTIONS

9.1 The development of the eligibility and criteria has been informed by research into similar frameworks operated by other Councils and grant-giving bodies. Developing a loose framework could lead to uncertainty and inconsistency in decision-making.

- 9.2** The decision to move to Crowdfunder UK from the previous platform provider was approved by Executive following a previous report.
- 9.3** The open and transparent nature of a ‘platform-based approach’ to the distribution of funds is a distinct advantage.

10. FINANCIAL IMPLICATIONS

- 10.1** The Council has agreed an annual budget for the scheme of £120,000. Funds will be allocated at two rounds each year. In the event of funds not being allocated in year, these will be carried forward.
- 10.2** The Council will make a maximum pledge of £12,000 or 50% of the campaign target, whichever is the lower amount.
- 10.3** It was agreed by Executive on 17th December 2026 to consider as part of the 2026/27 budget setting process making provision for platform hosting fees. Crowdfunder UK has confirmed that these will be £15,600 per annum - fixed for the lifetime of the contract.

11. LEGAL IMPLICATIONS

- 11.1** Crowdfunder UK will be contracted via the GCloud procurement framework, overseen by the Procurement team and Legal services team.
- 11.2** Applicants for grants through the Crowdfunder platform will not enter into a formal grant agreement directly with the Council. Instead as part of the application process they will agree to Crowdfunder’s terms and conditions which will include obligations similar to those in a traditional grant agreement. These include discretion for Crowdfunder and the Council jointly to withdraw, reduce or require repayment of funding in certain circumstances.

12. RISK ASSESSMENT

- 12.1** Crowdfunder UK have experience of hosting local authority funds, and funds of national bodies such as Sport England and businesses such as Aviva and British Airways.
- 12.2** The framework for assessing applications to the Westhive fund is robust and provides suitable mitigation to reduce the risk of improper use of funds. Crowdfunder UK will undertake initial due diligence checks.
- 12.3** All organisations raising funds on the platform must comply with Crowdfunder UK terms and conditions and pass their due-diligence checks. These include:
- All project owners must provide a UK bank account as only UK accounts are accepted.
 - All project owners must provide proof of identity when required by Stripe, by uploading a copy of a UK Government issued ID such as a passport or driving licence.
 - All businesses, organisations and charities must provide registration details and a valid address.
- 12.4** Funding will only be distributed once the project has reached its fundraising target.
- 12.5** A regime for monitoring and evaluating the impact of funded projects will be in place.

13. EQUALITIES IMPACT

13.1 The award process will consider equality and inclusivity to ensure that the Council meets its duty to pay due regard to the need to eliminate discrimination and promote equality in relation to:

- Age
- Disability
- Gender reassignment
- Marriage and Civil Partnership
- Pregnancy and Maternity
- Race
- Religion or Belief
- Sex

14. SUSTAINABILITY IMPLICATIONS

14.1 The Sustainability Impact Assessment is included in Annex A.

15. BACKGROUND PAPERS

15.1 None

(END)

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Annex A: Sustainability Impact Assessment Tool (SIAT) for Investing into the Community – Crowdfunding

Project Brief

To review the proposed application and assessment processes, criteria and eligibility of the new grants scheme which is expected to be hosted by Crowdfunder UK; and to update on the progress of commissioning Crowdfunder UK as the new host of the scheme.

NB: You can filter the justifications by colour using the filter option on the 'score' column.


For example, you can choose to only print red scores so that you can review them.

Criteria	Score	Justification
Energy Use	2	Unsure what types of project will come through this scheme however it's not out of scope that we may have something that addresses soil
GHGs	4	While future funding availability remains uncertain, the next phase of funding will be directed towards projects focused on climate change
Air quality	2	Unclear what funding will be available in the future, but funding for this next cohort will be dedicated to projects which address climate
Land use change	2	Again it is difficult to predict what future funds will be available and which projects will be successful so have estimated 'slightly'. Criteria
Soil and waterway health	2	Unsure what types of project will come through this scheme however it's not out of scope that we may have projects come through that
Waste	2	Unsure what types of project will come through this scheme however it's not out of scope that we may have something that addresses waste
Sustainable Transport	2	The current criteria place a strong emphasis on supporting sustainable transport projects, and the council pledged funding
Biodiversity	2	While the specific types of projects that will come forward through this scheme are not yet known, it is reasonable to expect that some bids
Climate Change Adaptation	2	While the specific types of projects that will come forward through this scheme are not yet known, it is reasonable to expect that some bids
Sustainable Materials	2	Unsure what types of project will come through this scheme however it's not out of scope that we may have something that addresses
Food	2	While future funding availability remains uncertain, one of the main criteria for the next phase of funding will be directed towards projects
Health	2	While future funding availability remains uncertain, one of the main criteria for the next phase of funding will be directed towards projects
Housing	0	It is not anticipated that the scheme would have any impact in this area.
Education	2	While future funding availability remains uncertain, one of the main criteria for the next phase of funding will be directed towards projects
Built Community	2	While future funding availability remains uncertain, one of the main criteria for the next phase of funding will be directed towards projects
Cultural Community	2	While future funding availability remains uncertain, one of the main criteria for the next phase of funding will be directed towards projects
Accessibility	2	While future funding availability remains uncertain, one of the main criteria for the next phase of funding will be directed towards projects
Local Economy and Jobs	0	It is not anticipated that the scheme would have any impact in this area.
Safety	0	It is not anticipated that the scheme would have any impact in this area.
Democratic Voice	0	No obvious impact in this area
Equity	2	Positive impact on groups with protected characteristics.



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 WEST OXFORDSHIRE DISTRICT COUNCIL	WEST OXFORDSHIRE DISTRICT COUNCIL
Name and date of Committee	EXECUTIVE – 10 JUNE 2026
Subject	PUBLICA BUSINESS PLAN 2026-2028
Wards affected	None
Accountable member	Andy Graham - Leader of the Council Email: andy.graham@westoxon.gov.uk
Accountable officer	Giles Hughes, Chief Executive Email: giles.hughes@westoxon.gov.uk
Report author	Frank Wilson Managing Director (Publica) Email: frank.wilson@publicagroup.uk
Summary/Purpose	To consider the Draft Publica Business Plan 2026-28, produced by the Publica Board in consultation with Directors and Shareholders, and to recommend that the Leader (as Shareholder Representative) approves the plan.
Annexes	Annex A - Business Plan 2026-2028
Recommendation(s)	That the Executive resolves to: <ol style="list-style-type: none"> 1. Endorse the Publica Business Plan 2026-2028 2. Request that the Leader, as shareholder representative, to recommend its adoption to the Board
Corporate priorities	<ul style="list-style-type: none"> • Putting Residents First • Working Together for West Oxfordshire
Key Decision	NO
Exempt	NO
Consultees/	Publica Board

Consultation	Council Management Teams Shareholder Forum (Leaders) Officer Transition Board (CEO's, s.151 officers and Publica reps) Publica Transition Legal Workstream (Monitoring Officers & Legal)
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1. EXECUTIVE SUMMARY

- 1.1** Publica's Articles of Association has twelve reserved matters for Shareholder Council approval, these ensure they retain the necessary control over their teckal company. Adopting or amending the Business Plan is one of the reserved matters.
- 1.2** The Business Plan proposed by the Publica Board spans a two-year time frame to tie in with the Local Government Reorganisation (LGR) deadline and runs up to Vesting Day of any new councils on 31 March 2028.
- 1.3** Whilst the exact shape and size of the new unitary councils are not yet known, the clear focus of the Business Plan is how Publica, along with its shareholding councils, will prepare its people and its services for LGR – the most significant change to the local government landscape in a generation.

2. BUSINESS PLAN 2026-28

- 2.1** The title of the 2025-26 Business Plan was 'Preparing for the Future' and the plan set out how we would complete the second phase of the Publica Review, transitioning phase 2 services back to council direct employment. The plan also considered the emerging landscape post the announcement of Local Government Reorganisation (LGR) and how we would consider the impact / opportunities for Publica and council services.
- 2.2** A clear steer was received from shareholders that council services must continue to be delivered to meet the priorities set out in their Council Plans and therefore the 2025-26 plan gave a focus on this and set out some of the key delivery priorities for Publica in respect of Customer Services, ICT and Cyber Security.
- 2.3** Looking forward from now it feels that the principles set out in the current Business Plan continue to apply – completion of the Publica Review followed by a significant period of preparation as we seek to collectively implement the final decisions of government on unitary structures. Of course, this cannot come at the expense of the services we currently deliver to our communities and delivery of priorities set out by our councils in an ever-shortening timeframe.
- 2.4** For the reasons set out above it seems appropriate to produce a two-year business plan which aligns to Unitary 'Vesting Day' – the size and shape of councils and future of Publica, as yet, remain undetermined.
- 2.5** This approach of a two-year plan allows us to clearly define to our employees what is in front of us in the run up to reorganisation – Year 1 is all about preparation whilst Year 2 moves into an implementation phase as shadow councils are formed.

- 2.6 The draft plan is attached at Annex A. The key changes that are covered include:-
- Updated Foreword – reflecting the challenge facing Publica and the councils as we prepare our teams for Local Government Reorganisation whilst not yet knowing what this means in detail
 - Governance changes – how we now work with councils after the Publica Review
 - Priorities – how we are delivering on council priorities and maintaining service standards
 - Service Offering – Key services that Publica delivers on behalf of the councils – this was felt important post the Publica Review so it is clear which services we deliver now
 - Preparing for the Future – Year 1 and Year 2 priorities focused on our people and delivering service reviews ready for LGR
 - Finances – 26/27 Budget and 3 year plan

2.7 The draft plan attached has been considered by Shareholder Forum and amendments requested have been made.

3. ALTERNATIVE OPTIONS

3.1 The Executive could determine not to approve the Business Plan and refer it back to the Board and Shareholder Forum.

4. FINANCIAL IMPLICATIONS

4.1 The financial implications of service provision set out in the Business Plan have been incorporated in the councils annual budget process. Where changes in provision occur during the year these are subject to contract variations which are agreed between Publica and the council.

5. LEGAL IMPLICATIONS

5.1 Approval of the Business Plan is a requirement of the Members Agreement and is a reserved matter for shareholders.

6. RISK ASSESSMENT

6.1 There are no significant risks in respect of the adoption of the Business Plan. Failure to adopt the Business Plan would require further engagement with shareholder and the Publica Board.

6.2 The Business Plan sets out how Publica will de-risk from an employment perspective any future transition to new unitary councils.

7. EQUALITIES IMPACT

7.1 In carrying out the preparation for LGR Publica will follow its equality and diversity policies and ensure no disadvantage to any group of either employees or service users.

8. CLIMATE AND ECOLOGICAL EMERGENCIES IMPLICATIONS

- 8.1** As a silver accredited Carbon Literacy Employer it will continue to ensure that the climate and ecological emergencies are considered as part of its operations.

9. BACKGROUND PAPERS

None

(END)

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Business Plan 2026 to 2028

Preparing for the Future

PUBLICIA

PUBLICA

I. Foreword



Frank Wilson
Interim Managing Director



Christine Gore
Chair of the Board

In 2026, local government in Gloucestershire and Oxfordshire stands on the cusp of the most significant change in a generation. In both counties the last year has involved the creation of business cases to meet central government's challenge to move to a standardisation of local government structures across the country. This 'unitarisation' of local government, merging county council and district council responsibilities, will impact all employees, councillors, residents and businesses within our partner council boundaries.

Change of this magnitude will inevitably impact the services Publica provides to its councils. Indeed, the councils, our shareholders, will cease to exist from April 2028 and will be replaced by new organisations. Establishing what this means for Publica, and therefore our employees, is critical over the next year so that we can provide a level of reassurance for them. Providing this clarity for the future will help us ensure that we can continue to deliver high quality services to our residents and businesses as we move through this period of significant change.

In 2025, submissions were made to the government which set out options for the future. For our shareholders this could mean that they will combine to become part of two or three councils in the future, which will be larger in scale and cover a broader range of responsibilities. The government anticipates making a final decision on what structures will look like in July 2026 with new councils going live on 1 April 2028.

Given the scale of transition required to establish new organisations (including elections in 2027), it is critical that the councils, with Publica playing its part, prepare for this new world. It is critical that we do not wait for the final decision but start preparation now – and we can confirm that it has already started.

The first year of this two-year business plan has a heavy focus on planning and preparing (where we can) for any changes. This will involve providing options for our shareholders to consider as they work with their partners across Gloucestershire and Oxfordshire in building future organisational plans. Whilst doing this, we will continue to make the case, where appropriate, for the shared delivery model that Publica demonstrates – a model that has delivered savings to our shareholders over the years at a level of almost twice the original business case.

The second year of the business plan will see both Publica and the councils move into delivery mode for the new councils – building the new organisations, establishing the infrastructure and supporting our people through this period of change.

Of course, in delivering all these changes for the future we cannot ignore the present, not only delivering great core services but also helping our councils deliver their legacy projects, ensuring residents are not disadvantaged by any future changes to structures, and ensuring the new councils get as clean a start as possible.

2. Introduction: The Publica Business Plan

Publica's Articles of Association have twelve reserved matters for shareholder council approval. This makes sure that they retain the necessary control over their 'Teckal' company. Adopting or amending the business plan is one of the reserved matters.

This business plan is for two years, reflecting the run up to local government reorganisation and the significant change that will bring. The main purpose of this plan is to:

- Continue the focus on delivering the shareholder councils' priorities and their legacies.
- Continue to deliver great, value for money services to residents and businesses on behalf of the councils.
- Recognise the need to balance continued provision of services whilst contributing to the significant work required to prepare for Local Government Reorganisation.
- Support and prepare our people and services for change as we build towards Local Government Reorganisation.



Our performance of key services across the year

BENEFITS

54,593



residents supported with applications

HOUSING

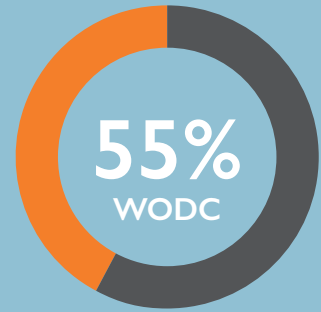
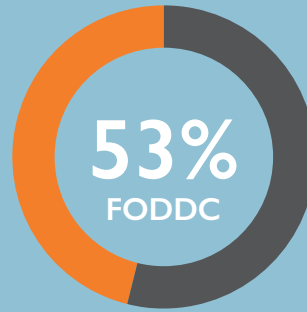
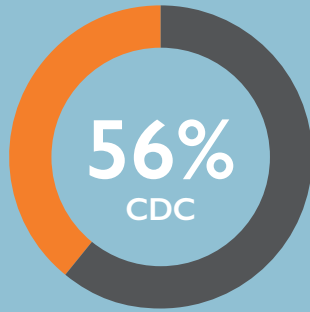


504

residents prevented from becoming homeless

WASTE

Our partnership delivers some of the best recycling rates nationally



£4.6M



cummulative savings from environmental services innovation programme

74,237



green licences sold

PEOPLE



130

Completed carbon literacy training

661

Staff supported through learning and development



CUSTOMER SERVICE

11%

Fewer phone calls



Over 185,000

Customer service cases opened

98%

of customers satisfied



REGULATORY



6,000

Planning applications validated



1,334

Food businesses inspected

3. The Publica Values

The Publica values will continue to help and guide us through the transition.

Authentic

We act genuinely and transparently. We do the right thing for our customers, our organisation and each other.

Modern

We are not set in our ways. We are constantly looking to find ways to innovate and do things smarter.

Flexible

We are agile - adapting how and what we do to meet the demands of our customers, our colleagues, our local communities and the needs of the modern world.

Thoughtful

We take pride in delivering a great service, taking the time to understand and care about the planet and the environment, as well as our customers and their needs.

Following both phases of transferring services from Publica, partner councils have introduced their own values and behaviours, developed collectively by both Publica and council employees.

Whilst each council may have subtly different values, these all overlap and complement our Publica values. We believe that all employees, regardless of their employer, should be happy to live by all the values that are agreed across the partnership.



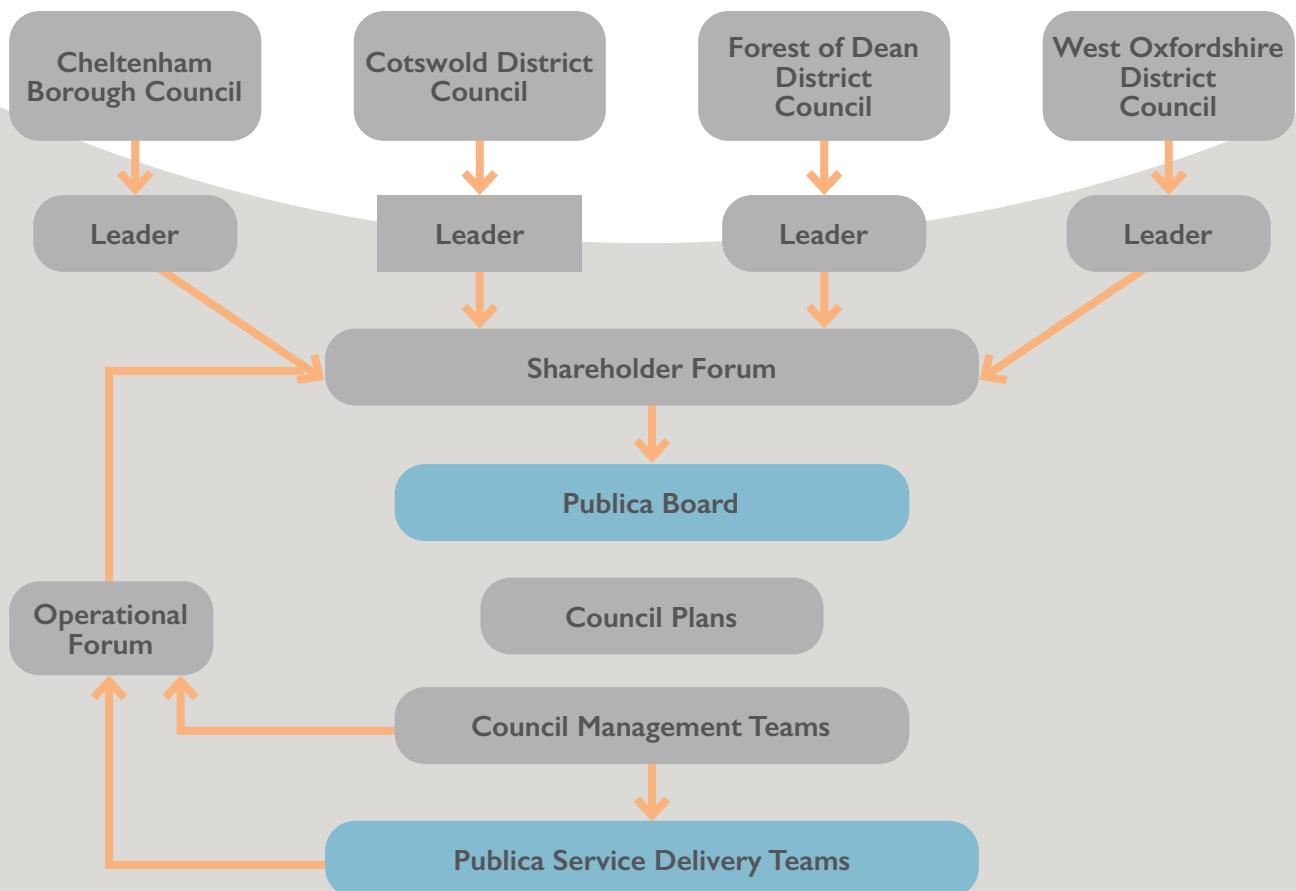
PUBLICA

4. Re-imagining Publica

Having successfully delivered the Publica Review, the services which now remain within Publica are those which are more traditionally delivered under shared service arrangements. This creates an opportunity as both Publica and the councils collectively face the new challenge of Local Government Reorganisation (LGR).

Following the transition of services, the councils are more focused on their role as commissioner of the services received from Publica and other strategic partners. Changes have been made to reshape the Publica Board and update governance arrangements including extending and simplifying service agreements, rejuvenating the Shareholder Forum, and introducing a new Operational Forum chaired by one of the Shareholder councils. The Publica Board now comprises of three executive directors and five non-executive directors, of which two are council officers collectively nominated by the shareholders.

A key focus of the Operational Forum through the life of this plan will be reviewing Publica performance and projects that will be delivered in the run up to LGR. The forum provides a platform for shareholders to explore our service performance and delivery in greater depth, complementing the current arrangements through council committees. The new governance structure is set out below.



5. Delivering council priorities and effective core services

Delivering council priorities

Shareholder councils have ambitious plans to deliver their local priorities. We are committed to delivering key projects with the shareholder councils, being flexible and agile to emerging priorities, and realising the benefits for local communities. Increasingly the focus will be on delivering legacy projects, which provide a lasting benefit for communities, in advance of the LGR transition.

The key projects that we will deliver for shareholder councils are as follows:

Communities and Economy

- Delivery of car parking and public convenience strategies to maximise the benefits these assets provide and ensure they are of good quality and meet the needs of local residents and visitors.
- Supporting local business and residents through review of Hackney Carriage and Private Hire policies.
- Supporting local communities to build their resilience so they can respond effectively to emergencies.

Housing and Wellbeing

- The Low Income Family Tracker (LIFT) project identifies residents that may be in financial hardship and need support. We have already supported residents to secure benefits with a lifetime impact of £421,000 and the next two years will build on the early success of the project.
- Supporting changes required for compliance with The Renters Rights Act including enforcing the new tenancy system and using strengthened enforcement powers through our regulatory teams in Housing and Environmental Health.
- Acquiring new properties to provide emergency accommodation in areas of high demand, to improve the living standards for those requiring support and reduce the costs for the councils.

Modern Services

- Three technology programmes, exploring AI, spatial data and improving the partnership ERP system.

- Tackling underperformance in key areas by embedding process redesign and continuous improvement so that services remain responsive, efficient, and fit for the future. This includes improving a number of frontline services delivered by Publica over the lifespan of this plan.
- Supporting improvements to our procurement processes and tools to enhance transparency, reduce financial risk, and ensure more efficient, compliant procurement activity. Strengthening financial control by ensuring all spending is pre-approved, reducing the risk of unauthorised or inaccurate payments.
- Providing well supported and managed placements for apprentices and T-Level students to support young people seeking employment in the districts and provide a pipeline of candidates for future vacancies.

Environment

- Supporting our business waste customers by helping them comply with Simpler Recycling requirements while making the process as straightforward as possible. Offering practical advice and responsive customer support to ensure businesses can manage their waste efficiently, reduce costs, and maximise environmental benefits.
- Digitising Food Health and Safety forms and strengthening document retention policies to reduce the associated environmental footprint, lowering waste and energy use and helping create a more sustainable and efficient service.
- Enhancing our environmental crime capabilities to tackle fly tipping incidents.

Our Core Service Offer

Customer services and the safe, secure technology that supports their delivery are the fundamental building blocks of everything Publica does. We believe that by designing simple, effective and value for money services, which are digitally enabled, we can ensure residents and businesses receive consistently good interactions

Customer Services

Delivering high quality, customer focused, services for residents is at the heart of everything Publica does. Customer needs and behaviours continue to change significantly, meaning the way in which we interact needs to continually evolve. Our promise to provide customers with prompt, high quality, easily accessible services remains as relevant as ever:

We have continually improved customer services to meet our strategic commitments to residents. This is borne out by the very high levels of customer satisfaction in relation to face-to-face and telephone interactions. As we continue to evolve, our work is focused on ensuring that customers have consistently good interactions throughout their entire journey with us.

Our current approach builds upon the successes in the front office but has a greater focus on back-office customer experience. This will provide more consistency for customers, reduce the need for repeat contacts, and provide a better overall experience by:

- Improving digital access with a focus on self-service
- Exploring automation of simpler tasks
- Optimising processes through redesign, to take advantage of modern technology.
- Make more data-led decisions
- Plan the workforce around the customer

Information and Communication Technology (ICT) Services and Cyber Security

Our technology and the teams that support it are the foundation of everything we deliver to support council services and residents. Continued investment by the councils has enabled us to do this safely and successfully. Our unified architecture across multiple organisations means that we can provide greater proportional value without increasing costs.

Every working day, our team enables around 1,800 people to log in and access the systems necessary for delivering council services. The ICT teams ensure that business systems remain accessible at all times from any location and to introduce new services and strengthen integration between business systems, residents and strategic partners.

The Cyber Security team leverages innovative technology, including AI and automation, to monitor and safeguard all of our operations, ensuring we are safe by design and default.

Over the coming years we will continue to evolve with three technology programmes designed to support the current and future needs of the councils. The programmes include projects such as laptop replacements, Cloud migrations of data and business systems, enabling existing systems with AI capabilities, implementing UK Government sponsored technologies, and implementing new data standards.

Just as our core Customer, ICT and Cyber support services form the basic building blocks underpinning service delivery, Publica also delivers a range of fundamental, front line, shared services that provide value to residents, businesses and communities. Some of the key services include:

Revenues

The service collects local taxation across 141,000 Council Tax accounts and almost 17,000 Business Rate accounts collecting around £280m in Council Tax and almost £100m in Business Rates per annum. Within this the service assesses the eligibility for discounts and exemptions for households and businesses and is responsible for the recovery of debts, up to and including representing the councils in court.

Benefits

A shared service team dealing with over 17,000 Housing Benefit and Council Tax Support claims. The service processes circa 65,000 changes per annum to these claims and provides vital, time critical, support to some of our most vulnerable residents. The team also delivers the Low Income Family Tracker campaigns which support struggling households.

Housing Allocations

This team manages a total waiting list of circa 5,500 housing applications. Operating a Choice Based Lettings system and working closely with registered housing providers and private landlords, the team help residents to take advantage of a broad range of housing options.

Homelessness

Supporting the most vulnerable members of our communities, the team seeks to prevent homelessness. Where this cannot be avoided they seek to secure suitable emergency accommodation and subsequently an appropriate and permanent home.

Environmental and Regulatory Services

This service has a broad scope, including Environmental Protection, Food Health and Safety, in addition to Licensing. Services ensure that land, air, water and noise pollution is effectively regulated, alongside housing and envirocrime enforcement. Teams ensure businesses operate safely and hygienically. The Licensing team review and regulate a wide variety of premises and activities, supporting license applicants to understand the boundaries of their license.

Service Support

A multi-purpose service providing support to many services within Publica and the councils, whilst also delivering key services such as Disabled Facilities Grants and planning administration.

Transactional Finance, Insurance and Procurement

The exchequer, accounts receivable, and accounts payable services manage the day to day transactional financial services for the councils. The insurance service manages the insurance contract for the four partner councils and Ubico, managing claims and premiums and liaising with the broker. The procurement team provides advice and guidance to all services on the commissioning and procurement of contracts for works and services, ensuring the partners remain compliant and achieve good value.

Paid for Products

Management of a range of commercial products that deliver over £5.6m revenue back to the councils, ranging from Green Waste licensing to grounds maintenance and bulky waste services.

Car Parking

Managing parking services across car parks owned and managed by three of our councils, they provide parking enforcement, management of Parking Charge Notices, issue of permits and management of income collection. They also manage Public Conveniences and the cleaning, cash collection and pay and display machines contracts that support these services.

Emergency Planning

Working with multi-agency partners this team supports locality duty officers, rest centre and coordination team managers through training and advice to ensure they can respond effectively in an emergency. They manage the preparation and testing of Business Impact Assessments and Business Continuity Plans reducing the risk of service disruption in the event of a challenge threatening normal operations.

Recruitment and Learning & Development

Providing a full end to end recruitment service for our shareholders and third-parties, and learning and development across the partnership.

HR & Payroll

Managing the full employee lifecycle from recruitment to payroll this team supports a number of our councils and third parties.

6. Preparing for the Future

Our shareholder councils will know the size and shape of the new unitary councils in the summer of 2026 and this will give some certainty to employees who will transfer to the new councils upon vesting in April 2028. The future of Publica will remain uncertain for a longer period and may not be clear until after the new shadow councils are formed.

A decision could include retention of Publica to provide services to the new councils or closing the company on or before vesting day. With links with Ubico, Publica already has a footprint which extends across the whole of Gloucestershire, and this will create opportunities for discussions as the new landscape emerges. However, Publica must prepare for all possible outcomes.

A key focus over the life of this business plan will be to implement people focused strategies to retain high quality people by preparing and supporting them in readiness for LGR.

To do this we will align services and people to the new unitary councils. Should the decision be made to close Publica, this work will ensure that people retained within Publica are treated fairly and their employment is protected, whilst also giving the opportunity to mitigate cost increases to councils.



Over the next two years we will deliver the following workstreams with shareholders:

Year 1

- Support the councils as they work towards the establishment of new unitary councils by being part of the LGR programmes for both Gloucestershire and Oxfordshire, bringing our skills and expertise to the benefit of the individual work programmes.
- Implement people focused strategies with the aim to retain high quality people by preparing for the future and providing support in readiness for LGR.
- Deliver in-depth reviews of our service provision to help understand the future options for the partnership, including the benefits, risks and costs of each option. Where there is an in-year change (where the service area moves back to the Council) this will be reported by the individual council through regular quarterly reporting. The table below sets out the programme of work to achieve this.

Description	FTE	Priority
Corporate Support	8.2	1
DFGs /Safeguarding/Refugees	7.7	1
Flood Defence and Land Drainage	6.0	1
Local Land Charges	2.9	1
Car Parks - Off Street	11.6	2
Homelessness	30.9	2
Human Resources	12.9	2
Environmental Regulatory Services (ERS)	30.1	2
Health & Safety	1.2	2
ICT	51.5	2
Housing and Welfare Benefits	23.1	3
Council Tax/NNDR Collection	26.1	3
Licensing	8.0	3
Reception/Customer Services	34.6	3
Payroll	4.0	3
Training Talent and Recruitment	8.5	3
Procurement	3.7	3
Insurances	2.0	3
Services Support Team	24.3	3
Finance, Transactional / Treasury / Creditors / Debtors	21.7	3
Resources Data Performance and Growth	14.0	3
Planning Validation- Service Management and Support	16.4	3

Year 2

- Agree the options for future service delivery with our shareholders and the shadow councils and then implement those outcomes ready for Vesting Day.
- Support the implementation of the new councils through the relevant workstreams including the transfer of any appropriate staff from the existing councils and Publica.

7. Finance and Risk

Publica was established by the shareholder councils in 2017 with a business case to deliver £2.3m of annual shared service savings through the company by 2028 with cumulative cash savings of £18m by the same date. Tracking of the savings post the Publica Review is now more difficult however, using the same principles established since 2017, the annual shared service savings have reached £4.1m and cumulative cash savings £30.6m if the proposed budget is delivered in 2026/27.

	2025/26 Approved Base	Movement	Revised 2025/26 Base	2026/27 Base
	£000s	£000s	£000s	£000s
Sales				
Contract Income	21,731	(2,681)	19,050	19,792
Direct Costs:				
Salaries (Inc. on-costs)	18,532	(1,918)	16,614	17,376
Agency Costs	30	0	30	30
Employee Transport and Travel	115	0	115	105
Other Staff costs	514	0	514	476
Gross Surplus	2,540	(763)	1,777	1,805
Administration Expenses	1,567	(635)	932	931
Operating Surplus	973	(128)	845	874
Net Interest (Payable)/ Receivable	76	0	76	91
Surplus	1,049	(128)	921	965
Tax	14	0	14	23
Contract Fee Refund	1,035	(128)	907	942
Retained Surplus	0	0	0	0

Three Year Forecast

This strategy extends beyond the timeframe for LGR implementation and therefore is very dependent upon decisions made in respect of Publica contracts as part of that implementation.

	2025/26 Base Year	2026/27 Year 1	2027/28 Year 2	2028/29 Year 3
	£000s	£000s	£000s	£000s
Sales				
Contract Income	19,050	19,792	20,397	21,016
Direct Costs:				
Salaries (Inc. on-costs)	16,614	17,376	17,897	18,434
Agency Costs	30	30	31	32
Employee Transport & Travel	115	105	108	111
Other Staff costs	514	476	490	505
Gross Surplus	1,777	1,805	1,871	1,934
Administration Expenses	932	931	959	988
Operating Surplus	845	874	912	946
Net Interest (Payable)/ Receivable	76	91	79	73
Surplus	921	965	991	1019
Tax	14	23	20	18
Contract Fee Refund	907	942	971	1,001
Retained Surplus	0	0	0	0

Risk Management

Publica maintains a strategic risk register which is considered regularly by its management team and the Audit and Risk Committee. This makes sure that we effectively manage the most critical risks facing Publica and its shareholders, whilst also continually scanning the horizon for emerging risks and opportunities. The key strategic risks for Publica are:

- Changes to the local government finance regime upon the shareholder councils financial standing
- Impact of Local Government Reorganisation on our shareholding councils and therefore Publica
- Recruitment and retention particularly in light of Local Government Reorganisation
- Continued risks in respect of cyber security

There remains an opportunity that any emerging unitary authorities may wish to adopt the 'Teckal' model of service provision particularly as Publica has an established track record of successfully bringing together services from multiple councils and creating a shared resilient and cost effective service. This could provide an opportunity for an expansion of service provision.

8. Performance Management Framework

Publica and the shareholder councils have made significant progress in becoming more data-driven and data-mature organisations, strengthening their ability to deliver modern, effective services for residents. Over the past year we have transformed our performance and improvement capabilities, building a seamless pathway from performance insight to enhanced service delivery.

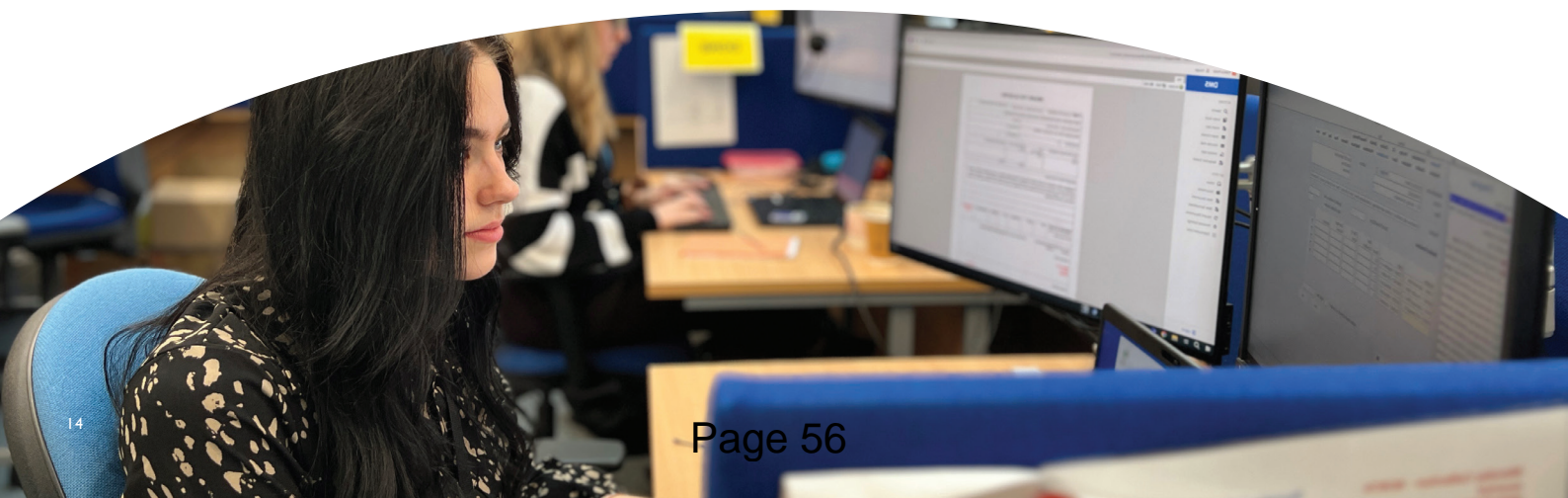
By ensuring that all partnership performance frameworks clearly highlight when performance is off-target at an early stage, we are able to trigger targeted interventions to support improvement and recovery.

At a practical level, strengthening our business partnering capability over the lifespan of this plan will build on existing work to embed a culture of insight, with managers and teams increasingly using data proactively to inform decisions.

As we move towards LGR, we are placing an increased emphasis on strengthening insight and performance across the full range of services delivered by Publica and the partnership. This will ensure that teams are fully supported to maintain high-quality delivery and that all services are handed over in a strong and stable position on Vesting Day. Our priority will be those services included within the corporate KPI suite, as these represent the areas of greatest impact for our residents and businesses.

The corporate KPI suite includes reporting on:


- Revenue Collection and Benefits Processing
- Customer Satisfaction
- Land Charge searches
- Long Term Empty Properties
- Housing and Homelessness
- Environmental investigation and enforcement
- High risks investigated within target timescales
- Customer contact (complaints, FOI, EIR etc.) responded to within target timescales
- Percentage of invoices paid within 30 days
- Server uptime and IT service request/incident response times
- Organisational Health including sickness, attrition and health and safety incidents.
- Financial Performance, payroll accuracy





PUBLICA



 <p>WEST OXFORDSHIRE DISTRICT COUNCIL</p>	<p>WEST OXFORDSHIRE DISTRICT COUNCIL</p>
<p>Name and date of Committee</p>	<p>EXECUTIVE – 10 JUNE 2026</p>
<p>Subject</p>	<p>UBICO BUSINESS PLAN 2026-27</p>
<p>Wards affected</p>	<p>All</p>
<p>Accountable member</p>	<p>Andy Graham - Leader of the Council Andy.Graham@westoxon.gov.uk</p>
<p>Accountable officer</p>	<p>Si Pocock-Cluley- Environment Services and Waste Transformation Lead Email: si.pocock-cluley@westoxon.gov.uk</p>
<p>Report author</p>	<p>Si Pocock-Cluley - Environment Services and Waste Transformation Lead Email: si.pocock-cluley@westoxon.gov.uk</p>
<p>Summary/Purpose</p>	<p>To consider the Ubico Business Plan 2026-27, which has been produced by Ubico in consultation with the Directors and Shareholders, and to recommend that the Leader (as Shareholder Representative) approves the plan.</p>
<p>Annexes</p>	<p>Annex A – Ubico Business Plan 2026-27 Annex B – Sustainability and Impact Assessment</p>
<p>Recommendation(s)</p>	<p>That the Executive resolves to:</p> <ol style="list-style-type: none"> 1. Note the Ubico Business Plan 2025-26; and 2. Note that, subject to feedback from the Executive, the Leader of the Council, as Shareholder Representative, will sign the written resolution to approve the Ubico Business Plan 2026-2027 in due course.
<p>Corporate priorities</p>	<ul style="list-style-type: none"> • Putting Residents First • A Good Quality of Life for All • A Better Environment for People and Wildlife • Responding to the Climate and Ecological Emergency • Working Together for West Oxfordshire

Key Decision	NO
Exempt	NO
Consultees/ Consultation	Leader of the Council WODC SLT Ubico Shareholders Ubico Board

1. EXECUTIVE SUMMARY

- 1.1** Ubico delivers high-quality environmental services, including waste and recycling collections, street cleansing, and grounds maintenance for WODC.
- 1.2** As a Teckal company, it provides services at the actual cost of provision, ensuring value for money without the overheads of commercial procurement
- 1.3** The 2026/27 Business Plan initiates a pivotal five-year strategy focusing on leveraging scale, delivering operational efficiency, and preparing for a changing local government landscape
- 1.4** Key objectives for the year include the mobilisation of services for Wiltshire Council, accelerating decarbonisation efforts, and preparing for Local Government Reorganisation (LGR) and 'Simpler Recycling' regulations

2. BACKGROUND

- 2.1** WODC is a shareholder of Ubico Limited, established to offer better value for money than commercial contracts
- 2.2** Under the Teckal model, the Council retains full control over high-value expenditure, as it owns or leases the assets (vehicles, depots, containers) used by Ubico
- 2.3** The Shareholder Agreement requires the annual business plan to be a reserved matter for Council approval
- 2.4** On 15 January 2026, The Managing Director of Ubico attended an All-Member Seminar to engage with members on the proposed 2026/27 Business Plan themes for consultation before final approval
- 2.5** In September 2025, the Executive agreed to enter into a replacement Shareholders agreement to ensure that the Agreement remains modern and reflects the needs of the business in terms of the relationship between Ubico and all the partners as a group.

3. MAIN POINTS

- 3.1** The 2026/27 plan is built around four key strategic pillars:
 - People: Focus on attraction, retention, and implementing enhanced employee terms and conditions
 - Operational Excellence: Embedding the 'Balanced Scorecard' for performance tracking and seeking further ISO accreditations
 - Climate: Reducing environmental impact through fleet decarbonisation and appointing a dedicated climate lead
 - Business Development: Managing growth, including the Wiltshire Council contract commencement in July 2026
- 3.2** Operational Intelligence: Ubico is moving from "anecdote" to "intelligence" by harnessing AI, data analytics, and in-cab technology to drive operational optimisation and financial sustainability
- 3.3** Legislative and Structural Changes: The plan includes preparation for the 'Simpler Recycling' regulations (impacting collection schemes from April 2027) and potential Local Government Reorganisation (LGR) in Oxfordshire

3.4 Ubico will work with partners to ensure a roadmap for service consistency ahead of any new unitary arrangements

4. ALTERNATIVE OPTIONS

4.1 The Leader could choose not to approve the plan; however, this would risk the company's ability to deliver the savings identified in the Council's Medium-Term Financial Strategy (MTFS) and progress toward corporate priorities

5. CONCLUSIONS

5.1 Acceptance of the 2026/27 Business Plan is recommended to ensure Ubico can continue to support the Council's financial and environmental targets while maintaining high-quality frontline services

6. FINANCIAL IMPLICATIONS

6.1 Ubico delivers services at the actual cost of provision

6.2 The 2026/27 plan supports the MTFS by identifying efficiencies through increased scale and technological innovation

7. LEGAL IMPLICATIONS

7.1 The Business Plan is a Reserved Matter for approval by the company's shareholders, in accordance with the Ubico Shareholder Agreement

8. RISK ASSESSMENT

8.1 Key risks include budget pressures, sector-wide competition for talent, and delays in digital transformation

8.2 Mitigations include robust monthly forecasting, a Project Management Office (PMO) to manage resource inflow, and comprehensive staff training for new technologies

9. EQUALITIES IMPACT

9.1 Not applicable.

10. SUSTAINABILITY IMPLICATIONS

10.1 Climate is a core strategic pillar

10.2 The plan prioritises fleet decarbonisation and Scope 3 emissions reporting to support WODC's target of being net-zero by 2030

10.3 Failure to approve the plan could jeopardise these carbon reduction goals

10.4 The Sustainability Impact Assessment is included in Annex I

11. BACKGROUND PAPERS

11.1 The following documents have been identified by the author of the report in accordance with section 100D.5(a) of the Local Government Act 1972 and are listed in accordance with section 100 D.1(a) for inspection by members of the public:

- None

11.2 These documents will be available for inspection online at www.westoxon.gov.uk or by contacting democratic services democratic.services@westoxon.gov.uk for a period of up to 4 years from the date of the meeting.

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2026/27 Business Plan

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1. Business Overview

1.1. Introduction

Ubico is a successful and well-respected local authority owned company operating across Gloucestershire and West Oxfordshire. We deliver high quality environmental services including waste and recycling collections, grounds maintenance, street cleansing and household recycling centre management. Our purpose is to keep places clean and green for every resident, visitor, town, village and community. Working in close partnership with our shareholder councils, we strive to deliver a service that benefits both councils and communities, helping them achieve their individual objectives.

Ubico has seen significant growth since we started delivering services in 2012 and will grow again in 2026/27 with the commencement of environmental service delivery for Wiltshire Council from July 2026, and the mobilisation and delivery of these services will be a key focus for the year.

Our growth, size and position places us in a strong position to leverage opportunities for greater efficiencies across a wider base, leading to cost-savings for our councils and their residents and the opportunity to explore new and exciting areas for growth and innovation. A new five-year strategy roadmap for the company from 2026 to 2031 has been developed, building on the successes already achieved in the previous five years.

We are a significant local employer, particularly in Gloucestershire, where we were 64th in the top 100 employers in the county based on 2023 turnover, up from 72nd in 2022. In 2026/27 we will employ around 1,300 people, who are the backbone of our operations. We will continue to have a strong focus on our people this year and advance our work on climate initiatives. This includes fleet decarbonisation, improving resource and energy use efficiency, biodiversity and clean energy, as well as working closely with our partners to support them in delivering their ambitious climate targets. A key consideration for the next five years is the change that Local Government Reorganisation could bring, and we will work closely with our shareholders who may be affected by this to help prepare for any such transition.

1.2. Quality and safety

Ensuring high standards of health, safety and compliance is a key priority and underpins everything we do. This is demonstrated through our ongoing achievement of industry-recognised accreditations, including ISO 45001 and ISO 14001 for our Health and Safety Management and Environmental Management Systems respectively, which reflects our positive health and safety culture which we are committed to maintaining and improving. Our Safety, Health, Environment and Quality (SHEQ) team drive our safety culture and practices, and health and safety performance is monitored at all levels of the business and reviewed by our board of directors at every board meeting. Our internal compliance team supports the company in maintaining high standards through a thorough programme of scrutiny involving both scheduled and risk-based assessments, checking compliance in key areas such as ISO standards, fleet compliance, Environment Agency permitting requirements and the Health & Safety at Work Act 1974. This is complemented by our annual internal audit plan which is drawn up in consultation with the Risk and Audit Committee and in partnership with our independent internal auditors.

1.3. Our services



1.4. Our shareholders



Wiltshire Council will also join as a shareholder during 2026.

1.5. Governance and risk management

1.5.1. Governance

Good corporate governance and the continued professional development of the board of directors and the senior management team is fundamental to the effective operations of the company. In 2026/27 we will continue to ensure appropriate competency standards and qualifying criteria are applied to all directors and follow the spirit of the UK Corporate Governance Code. At all times, the company will remain open, transparent and accountable. The board and its members will operate as a cohesive team, with its priority to further the aims, goals and values of the company, whilst always having risk and risk management at the forefront of discussions.

The board is supported by two sub-committees, a Risk and Audit Committee and a Governance and Nominations Committee. These committees support the board in key governance areas, for example, better understanding of business risk, and ensuring the processes to mitigate risk are effective and there is compliance.

1.5.2. Risk management

Risk management is a core principle of effective corporate governance and is also a key contributor to a sound internal control environment.

Our strategic risk management objectives include board and senior management setting a 'tone from the top' on the level of risk we are prepared to accept – our 'risk appetite'. We maintain a strategic approach to risk management in order to make better informed decisions and use risk management to enable consistent appraisal of options and improved flexibility/agility in delivering change. Overall, we aim to develop a culture of balanced and informed risk-taking throughout Ubico, including strategic, programme, partnership, project and operational risk.

1.6. Our values

Ubico was created to enable local authorities to enjoy greater efficiencies through economies of scale, and more control over the delivery of services. This approach is reflected in our company values, which are applied across all our services.



1.7. Balanced Scorecard (BSC)

We are continuing our development of the 'Balanced Scorecard' BSC approach for tracking key indicators. BSC is a strategic management performance metric used to identify and improve various internal business functions and their resulting external outcomes. This mechanism will be integrated into the Ubico 2030 Strategy. The BSC leverages and standardises significant key performance indicators (KPIs) and key results indicators (KRIs) to measure and showcase our performance against strategic objectives and our four pillars. It offers a comprehensive view of organisational performance, ensuring every aspect of the business is evaluated.

2. Business Plan 2026/2027

2.1. Our company vision

Recognised by our customers and employees as a quality provider of sustainable services for our local communities, delivering best value and reliability

Through:

- Leveraging synergies and economies of scale
- Harnessing opportunities to deliver value back to our partners
- Using technology to drive operational efficiency
- Understanding our communities' needs
- Inspiring our workforce to be committed to providing value for money and carbon neutral services

2.2. Strategic pillars

Four strategic pillars underpin delivery of our vision and our business plan:



2.3. Strategy planning

2.3.1. Annual planning and engagement process

Ubico's board routinely evaluate the validity of our company vision, and the roadmap for its delivery, ensuring it reflects the needs and desires of our shareholders and maintains the company as a sound proposition, whilst driving value. The process for drawing up the annual business plan incorporates feedback from key stakeholders, including the company's senior management team and the board. Shareholder engagement presentations take place with each shareholder council ahead of presentation of the final written business plan, which incorporates feedback received.

2.3.2. Introduction of the new five-year strategic roadmap (2026–2031)

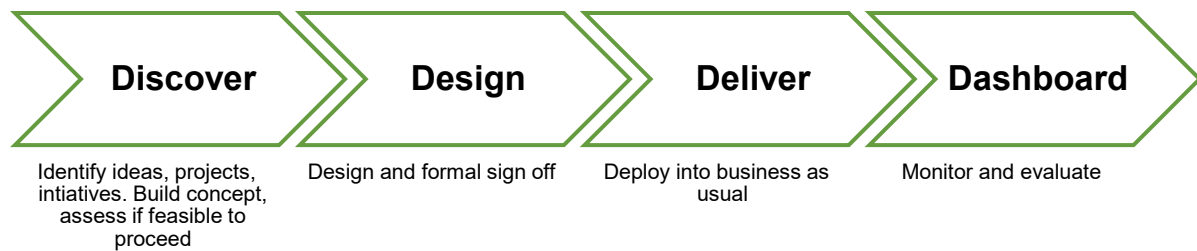
2026/27 marks a pivotal year for Ubico as we conclude delivery of our 2021–2026 strategic plan and commence a new five-year strategy roadmap covering 2026–2031. The previous five-year period saw significant organisational growth, expansion of our digital capabilities, delivery of high standards in operational performance, and substantial progress in carbon reduction. Building on these achievements, our new five-year strategy focuses on leveraging our increased scale, delivering further operational efficiency, and preparing for a changing local government landscape. Key long-term priorities include:

- Leveraging scale and collaboration across shareholders to enhance efficiency and resilience.
- Mobilising and delivering services for Wiltshire Council from August 2026, one of Ubico's largest new service programmes.
- Preparing for potential Local Government Reorganisation, enabling early opportunities for alignment and future-proof service planning.
- Accelerating decarbonisation, improving depot and fleet efficiency, strengthening environmental, social and governance reporting, and supporting partner climate goals.
- Embedding robust performance management, including full integration of the balanced scorecard.
- Harnessing technology, AI and data analytics to drive improved insights, operational optimisation and financial sustainability.
- Investing in people, including recruitment, retention, learning and succession planning to meet future workforce needs.

As the first year of our new strategic roadmap, 2026/27 continues the momentum of the past five years. The priorities set out for this year will help us to both build on the progress we have already made and lay firm groundwork for the years ahead.

2.4. Project lifecycle

We have adopted a project lifecycle with four phases; Discover, Design, Deliver and Dashboard:



This aids in identifying the stage of each project or initiative to support our long-term planning and strategy mapping, as well as resource management.

All projects and programmes are managed through a stage gateway system and strategic projects are managed by the Project Management Office (PMO) and sponsored by a member of the executive leadership team. The project scope, objectives, goals, budget, and necessary stage documents are closely managed by the senior leadership team, and progress against delivery of strategic projects is routinely monitored by the board.



A thriving workforce that is skilled, motivated, and aligned with Ubico's values

2.5. People pillar

2.5.1. 2026/27 activity

In our people pillar we will continue our focus on attraction and retention, supporting and valuing our excellent colleagues. We have previously undertaken a project to review and enhance employee terms and conditions and will conclude this work by implementing the agreed benefits this year. We have successfully broadened our recruitment routes for new employees in the past few years, to include working with a wider range of local employment hubs and community programmes, and this year will work to strengthen these relationships to maintain robust recruitment channels. We will develop the use of our new candidate application system, using data insights to inform recruitment strategy, and will evaluate our sourcing and advertising channels to identify any opportunities. We will design an appraisal scheme to suit all levels of the business and will continue the development of our succession planning process, introduced in 2025/26, and use it to inform and build our future talent pipeline.

Our communications strategy has a strong focus on our market presence and enhancing our reputation to support attraction and retention. Our employee engagement programme, delivered now for the past three years, has proven invaluable in gaining feedback from colleagues across the company. This year's survey will be enhanced to include specific questions around leadership to identify strengths and weaknesses, and the process for post-survey review and feedback will be formalised. We will continue to celebrate and promote our successes, making best use of our social media platforms and other communication channels to promote working for Ubico and entering relevant sector awards, and will implement a peer-to-peer and manager-led recognition programme.

In 2026/27, Ubico will grow again, welcoming teams delivering environmental services in Wiltshire, and proportionally increasing capacity requirements in a number of our support teams which will be recruited to throughout the year. In our people pillar we will support the mobilisation and successful delivery of these services through proactive engagement from the earliest opportunity, comprehensive support throughout the TUPE process, the provision of effective inductions and training for our new colleagues, and the integration of ongoing support into our business-as-usual operations following service commencement.

2.5.2. People – key risks and mitigations

Risk	Mitigation
People team capacity to manage an expanding portfolio.	Additional, appropriate, people team resource and capacity included in relevant business cases to ensure support in place.
Broader sector challenges, such as competition for talent, changes in local authority funding, and evolving employment practices, can impact Ubico’s ability to attract and retain staff.	Increase reach of vacancies, routes to recruitment and improve job application process. Ongoing monitoring of market conditions, interest in our vacancies, vacancy fill rate and attrition rate. Adaptation of recruitment and retention strategies.
Loss of knowledge with retiring personnel / risk of losing colleagues in key roles.	Succession planning project underway and used to inform future talent pipeline.
Low engagement or wellbeing issues can lead to reduced productivity, higher absence rates, and increased turnover.	Annual engagement surveys, action plans, and recognition programmes are in place to address issues and promote a positive culture.



High-performing, safe, and innovative service delivery

2.6. Operational excellence pillar

2.6.1. 2026/27 activity

The activities identified in our operational excellence pillar support Ubico in providing high quality, safe and compliant services, harnessing continuous improvement and innovation wherever possible.

In 2026/27, we will continue to enhance measures to demonstrate our progress against our strategic goals, develop sound business intelligence to be able to react and adapt to change, and use insights from our data to help evaluate quality and performance that we can use to strengthen the management of the business and inform future business decisions and strategy. To support this, our balanced scorecard will be embedded across the business to inform both operational and strategic assessments. We will also continue to develop our strategic cost projection plans, analysing each to inform future decision-making and project planning.

2026/27 will be our second year of delivery to a three-year internal audit plan. We will continue to seek accreditation to our existing ISO standards for our Health and Safety, and Environmental Management Systems, as well as beginning the process of extending our accreditation to include ISO accreditation for energy and quality management systems, and greenhouse gas reporting. Options for a health and safety platform or software will be evaluated to streamline health and safety processes. We will also begin the process of evidencing our high standards in driver and vehicle compliance through accreditation to the Driver and Vehicle Standards Agency (DVSA) Earned Recognition scheme.

A key area of work that we will undertake in 2026/27 will be the mobilisation and commencement of waste and recycling collection services for Wiltshire Council, and, once mobilised, a key focus in our Wiltshire services will be planning for scheme changes coming into effect in 2027, as well as planning for the introduction of kerbside films collections across all our recycling services from 2027.

The introduction of 'in-cab' technology across our waste, recycling, street cleaning and grounds maintenance services has been a key project in our digital transformation programme in recent years. Now in place across the company, work will continue to focus on benefits realisation, insight analysis and harmonising the operational approach to system use across the company, to drive efficiency. Implementation of in-cab technology in our new

Wiltshire services will be a key element of the mobilisation project ahead of service delivery commencement in July 2026. A strategy will also be developed to harness emerging technologies, artificial intelligence, and data analytics facilitate smarter decision-making, operational optimisation, and future readiness. This strategy will be subject to regular review to ensure it remains aligned with technological developments and organisational priorities. We will also undertake a review of our suite of performance dashboards to ensure an efficient and effective approach.

We are committed to fostering positive impacts on society and the environment and will continue to ensure that social responsibility is embedded into our policies, plans and business practices to the benefit our employees, the wider community, and the environment. We will continue to leverage procurement opportunities to gain social, economic and environmental benefits for the communities we serve, sourcing local goods and services wherever economical and practical. We will provide local employment opportunities with good employment standards and practices and will provide apprenticeship and training opportunities. We will support community initiatives, for example by collecting bagged waste after community litter picks and supporting our partners at community events when requested. We will also explore opportunities to support and expand community volunteer initiatives, working in partnership with our shareholder councils to develop clear frameworks for collaboration.

2.6.2. Procurement activity 2026/27

Planned 2026/27 procurement activity is outlined below:

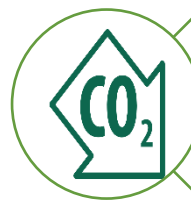
- Award contract extensions or undertake new procurement activity and award a contract for the supply of:
 - Fleet management system
 - Vehicle hire
 - Outsourced fleet maintenance – West Oxfordshire
 - Cleaning / janitorial and operational supplies
 - Weed control operations covering Cheltenham and Cotswold
 - Service and repair or refurbishment of waste/hooklift containers
 - PPE and uniform
 - Management of haulage and sales of recyclate, disposal of recycling products

- Undertake new procurement activity and award a contract for the supply of:
 - PPE, footwear and gloves

- Provision of vehicle parts
- Provision of fuel cards
- Provision of Connected Workforce Solution (in-cab, and separate arrangement for Wiltshire)
- Container management for Wiltshire
- Fleet maintenance provision for Wiltshire

2.6.3. Operational excellence – key risks and mitigations

Risk	Mitigation
Budget pressures.	Continue to seek early understanding of areas of cost pressure for partners and, with partners, consider mitigation plans where necessary. Continue to highlight potential areas of cost pressure as early as possible in both budget setting processes and monthly forecasting reports.
Delays or resistance in moving from paper-based to digital processes could result in inefficiencies, data loss, or lack of real-time insights.	Comprehensive training, engaging colleagues early in the process, and ensuring robust change management. Pilot new systems before full rollout where possible, monitor adoption closely, and review effectiveness on a regular basis.
Failure to develop or implement a clear strategy for emerging technologies could lead to missed opportunities, wasted investment, or security vulnerabilities.	Regularly review the strategy to adapt to technological advances and organisational needs, regularly assess our needs.
Capacity to deliver unplanned work.	Project management office manages inflow and monitors resource availability. Partner expectations managed where unplanned work is requested, and additional resource requested if required.



Reduced environmental impact and leadership in sustainability

2.7. Climate pillar

2.7.1. 2026/27 activity

Ubico's carbon strategy recognises two strands of activity:

- Ubico owned carbon reduction activities that are within the gift of the company to deliver.
- Shareholder sponsored activity which requires approval and funding from our shareholders.

We will continue to deliver our programme of activities to reduce our environmental impact across the business, evaluating the resources we need to deliver the outcomes of our climate pillar, and investing in relevant training for colleagues in key roles. To strengthen delivery of our climate commitments, we will appoint a dedicated climate lead responsible for coordinating our carbon reduction activities, supporting shareholder sponsored projects, and driving progress across our climate pillar. We will also explore options for any grants or funding which may be available to us to support delivery of climate projects and benefits and will evaluate the potential benefits of establishing a Ubico-led climate operations forum to facilitate shared climate discussions with all our partners simultaneously.

Another key project will centre around the impact from our use of resources within the buildings and depots that we occupy, building on the outcomes from a pilot scheme undertaken during 2025/26. The scheme has a focus on influencing attitudes and behaviours to reduce our energy consumption, save money and reduce our environmental impact.

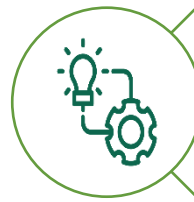
Work will continue with our significant suppliers to gather data on their scope 1 and 2 emissions, allowing us to gather more detailed data for scope 3 wherever possible, and we will continue to evaluate our opportunities for sourcing more environmentally friendly products in our supply chain, within our existing budget constraints. We will design a dashboard of relevant key performance Indicators for projects which have a significant climate impact and we will consider adopting a formal mechanism for the recording and reporting of our environmental, social and governance (ESG) performance.

Building on the successful introduction of a number of alternative fuelled vehicles (AFV's) and electric vehicles (EV's) with our partners, we will continue to advocate for and support the introduction of alternative fuel options, coupled with any associated change of infrastructure, where this is supported by our shareholders. We will also continue to maintain

our close working relationship with our partners and shareholders, supporting projects that increase biodiversity and reduce carbon emissions.

2.7.2. Climate – key risks and mitigations

Risk	Mitigation
<p>Resource to deliver climate specific activities. Innovation projects in fleet or depots may face technical, financial, or operational barriers, delaying climate benefits.</p>	<p>Appropriate teams within Ubico lead on different elements of our climate pillar delivery, and all teams support initiatives. Work closely with partners to assess feasibility, conduct cost-benefit analyses, and pilot innovations before wider rollout.</p>
<p>Ubico’s success in reducing its carbon emissions is intrinsically linked to partner decisions.</p>	<p>Climate opportunities which must be approached jointly are presented to partners for consideration. Ubico invited to attend key partner climate meetings.</p>
<p>Failure to deliver visible climate progress could damage Ubico’s reputation with shareholders and the public.</p>	<p>Celebrate successes, provide transparent progress reports, and engage stakeholders in climate initiatives.</p>
<p>Lack of robust social impact and climate KPI’s could lead to poor visibility of progress and missed opportunities for improvement.</p>	<p>Evaluate and adopt suitable measurement tools, develop a comprehensive KPI suite, and embed reporting into governance processes.</p>



2.8. Business development pillar

2.8.1. 2026/27 activity

Key focus areas in the business development pillar this year are around reviewing services delivered for each shareholder to identify opportunities for joint working and supporting planning for potential Local Government Reorganisation (LGR). Another key project is mobilising for the delivery of environmental services for Wiltshire from August 2026 and we will continue to engage shareholders on potential service enhancements and explore new offerings to keep pace with evolving needs. We will also consider and plan for the impacts of 'Simpler Recycling' regulations.

If enacted, Local Government Reorganisation (LGR) could significantly alter our shareholder structure in the next few years and offer opportunities to introduce greater consistency in service delivery and policy across new unitary authority areas. Ubico will work closely with our relevant partner councils to identify a roadmap for delivering any changes needed ahead of any new unitary arrangements coming into effect, as well as considering and planning for changes that may take place after that date. Where feasible, Ubico will also develop business cases and a roadmap for appropriate and agreed service consistency measures ahead of any formal LGR changes, to capture early benefits, streamline operations, and reduce disruption when new unitary arrangements are eventually enacted.

For the mobilisation and implementation of service delivery of environmental services for Wiltshire Council, we will deliver a carefully planned programme of work which will include the transfer of people and resources, deployment of vehicles and infrastructure, robust engagement with key stakeholders to ensure a smooth and effective transition, and the integration of a new shareholder into our governance structure. Once mobilised, work will begin to plan for changes to the services to be delivered in the 2027/28 year.

The new requirements of the 'Simpler Recycling' regulations will start to impact our partners' collection scheme designs from April 2027, with the addition of films collections required at the kerbside from that date, and food waste if not already collected. In 2026/27 we will begin planning for the addition of these services to kerbside collection schemes where necessary, working in close partnership with our shareholder councils.

We will undertake a review of the services we could provide to parish and town councils, assessing demand, feasibility, and alignment with our shareholder priorities. This will include

exploring opportunities to support local communities through tailored environmental services and identifying gaps where Ubico could add value.

We will also continue to support partner activities that safeguard future growth and improve operational efficiencies; continue to consider any approaches relating to growth which could create value for the partnership, using our shareholder approved outline business case fund to forward business cases in a timely manner for shareholder consideration, and design any growth projects which are approved.

2.8.2. Business development – key risks and mitigations

Risk	Mitigation
Expectation of delivery beyond that which can be achieved with available capacity.	Resource analysis undertaken for key current and potential future projects. Scenario planning in place to consider range of scenarios and how that might impact resource requirement.
Leadership capacity to manage an expanding portfolio.	Focus on core environmental services where we are skilled and experienced. Include additional, appropriate, leadership capacity in any business cases for growth.
Not responding to pending legislative changes could expose Ubico to compliance risks or require last-minute adjustments.	Sound project and resource planning, involve legal and compliance teams early, maintain open dialogue with shareholders.
Failure to anticipate or respond to LGR impacts could disrupt services or strategic projects.	Monitor LGR developments closely, engage with shareholders on potential impacts, and develop contingency plans for different scenarios.
Lack of alignment or appetite for cross-boundary projects could limit collaboration and growth.	Engage in open dialogue with shareholders, identify mutual benefits, remain flexible to adapt to changing circumstances.


Project Brief

To note the Ubico Business Plan 2026/27

Criteria	Score	Justification
Energy Use	2	Ubico is focusing on reducing energy consumption within occupied buildings and depots through behavioural change initiatives and resource efficiency projects
GHGs	4	The plan prioritises fleet decarbonisation and includes formal reporting for scope 1, 2 and 3 emissions, supported by a dedicated climate lead
Air quality	4	Operational impact on air quality is mitigated by the continuous transition to alternative fuelled vehicles and electric vehicles
Land use change	2	Ubico supports shareholder sponsored projects that increase biodiversity and enhance local environmental stewardship
Soil and waterway health	4	Professional delivery of street cleansing and grounds maintenance prevents contamination and mismanagement of waste
Waste	2	The plan includes preparing for "Simpler Recycling" regulations to support recycling rates and reduced residual waste.
Sustainable Transport	0	Although Ubico is advocating for and supporting the infrastructure required for alternative fuels, this will be limited to Ubico operated fleet only
Biodiversity	4	Activity includes supporting projects that increase biodiversity and maintaining clean environments for wildlife through grounds maintenance
Climate Change Adaptation	4	Ubico is aligning with the zero-emission goal by investing in green skills and appointing a lead to coordinate carbon reduction activities
Sustainable Materials	0	Procurement strategies leverage opportunities to source environmentally friendly products and local goods wherever practical
Food	0	NA
Health	2	The move towards alternative fuels will increase air quality
Housing	0	NA
Education	0	NA
Built Community	0	NA
Cultural Community	0	NA
Accessibility	0	NA
Local Economy and Jobs	4	Ubico is a local employer

Safety	0	NA
Democratic Voice	0	NA
Equity	0	No impacts on groups with protected characteristics.



 WEST OXFORDSHIRE DISTRICT COUNCIL	WEST OXFORDSHIRE DISTRICT COUNCIL
Name and Date of Committee	EXECUTIVE – 10 JUNE 2026
Subject	SERVICE PERFORMANCE REPORT 2025-26 QUARTER FOUR
Wards Affected	ALL
Accountable Member	Councillor Alaric Smith – Executive Member for Finance. Email: alaric.smith@westoxon.gov.uk
Accountable Officer	Giles Hughes – Chief Executive Email: giles.hughes@westoxon.gov.uk
Report author	Yemi Olu-Opaleye – Senior Performance Analyst. Email: yemi.olu-opaleye@publicagroup.uk
Purpose	To provide details of the Council’s operational performance at the end of 2025-26 Quarter Four (Q4).
Annex	Annex A - Council Priorities report Annex B - Corporate Plan Action Tracker Annex C - Performance indicator report
Recommendation.	That the Executive Resolves to: I. Note the 2025/26 Q4 service performance report.
Corporate Priorities	<ul style="list-style-type: none"> • Putting Residents First • Enabling a Good Quality of Life for All • Creating a Better Environment for People and Wildlife • Responding to the Climate and Ecological Emergency • Working Together for West Oxfordshire
Key Decision	NO
Exempt	NO
Consultees/ Consultation	Publica Directors, Business Managers, Service Managers and Service Leads.

I. BACKGROUND

I.1 The new Council Plan was adopted in January 2023 and the Action Plan, setting out how the priorities within the Council Plan will be delivered, then followed. Additionally, following on from the external audit report in August 2023 which included a recommendation to review performance management to match the Council Plan and measure performance, a new performance framework has been developed. This includes a Corporate Action Plan Tracker and a Priority Report alongside the service output metrics.

High-performing front-line public services are critical to the Council's role in supporting residents, businesses and communities. By ensuring our performance framework highlights variations from expected performance at the earliest opportunity, we can trigger targeted interventions that support improvement and recovery. This, in turn, strengthens our ability to provide modern, effective services for residents, businesses and communities.

Our performance framework covers the full range of public services delivered to communities through a variety of delivery models including the Council itself and the Council's Teckal companies (Publica and Ubico). The report aims to provide the necessary information for the Council to assess whether services are being delivered in line with agreed quality standards and expectations.

I.2 The Council's Chief Executive is responsible for reviewing and approving the information provided in this report prior to its publication.

2. COUNCIL PRIORITY REPORT

2.1 Progress on actions in the Corporate Plan for Q4 include:

- Community Infrastructure Levy (CIL) was successfully implemented, going live on 31 January 2026 and now applied to all relevant planning applications.
- Salt Cross Garden Village reached a major milestone, with the Area Action Plan adopted in February 2026, agreement on outline application updates, refreshed PPA, updated Section 106 schedule, and a clear work programme aiming for outline application updates by Autumn 2026.
- Town centre and regeneration activity progressed, including Witney wayfinding, award of 14 shopfront grants and advancing public realm designs. Carterton regeneration advanced, with an Interim Regeneration Lead appointed and work beginning on the Carterton Area Strategy, including green investment opportunities linked to RAF Brize Norton.
- Woodford Way scheme progressed, the latest design for the site was presented to the Executive and Overview & Scrutiny Committee for discussion, the covering report outlined a medium density scheme that comprises of 55 dwellings (20 maisonettes and 35 apartments) and 84 public parking spaces, which will be Registered Provider-led, supported by £215k of earmarked viability funding.
- Household Support Funding totalling £60k to those facing financial barriers - through grants, vouchers to food groups and organisations supporting carers.
- The Windrush Leisure Centre decarbonisation project continues to progress and surpassed a major milestone in Q4 with the installation of the new low-carbon heating system and electric waste vehicles ordered. Nature Recovery Growth funding secured, and UKSPF/REPF delivery extended to September 2026.
- Westhive Round 6 was completed, with 14 community projects receiving Council and community pledges. In addition, Executive approved continuing the council's community crowdfunding approach for a further three years starting April 2026.

- Youth engagement strengthened, with a new West Oxfordshire Youth Partnership established and a Youth Voice programme progressing, supported by DCMS funding via OCC.

2.2 The Council Priority highlight report is attached at Annex A with an overview of progress against all actions in the Corporate Plan is attached at Annex B.

3. SERVICE PERFORMANCE

3.1 Overall, the Councils performance remained strong across many key services, with high customer satisfaction, excellent planning determination times and continued growth in leisure participation. Council Tax collection met target and despite pre-application advice targets not being met, there was strong overall financial performance in Planning, with total planning income reaching £1.71m against a £1.33m target for the year. Affordable housing delivery exceeded expectations, reaching 352 homes against a target of 274.

A smaller number of services experienced ongoing pressure, particularly in the processing of Housing Benefit and Council Tax Support changes, where in quarter improvements have not yet offset the cumulative impact of earlier delays and increasing case complexity. FOI response times were slightly below target and Land Charges performance was impacted by both large concentrations of applications over short timescales and by staffing shortages, though early signs of recovery are evident. Recycling rates continue to reflect seasonal and national trends. Taken together, Q4 demonstrates strong and consistent delivery across priority services, with targeted improvement work in place where performance remains below expectations.

3.2 Service performance above target:

- Percentage of Council Tax Collected (98.03% against a target of 98%)
- Customer Satisfaction – Telephone (97.98% against a target of 90%)
- Percentage of major planning applications determined within agreed timescales. All 12 were determined within target - 100% against a target of 70%
- Percentage of minor planning applications determined within agreed timescales (90.32% against a target of 65%). Of the 62 applications determined, 56 were within agreed timescales.
- Percentage of other planning applications determined within agreed timescales (97.47% against a target of 80%). Of the 198 applications determined, 193 were within agreed timescales.
- Total Planning Income (£1,713,275 against a target of £1,330,173)
- Percentage of FOI requests answered within 20 days (91.2% against a target of 90%)
- Percentage of Planning Appeals Allowed (cumulative) (27.03% against a target of 30%). Thirty-seven Section 78 Appeals were determined in 2025/26, of those 37, ten were allowed
- Number of affordable homes delivered (cumulative) (352 against a target of 274)
- Percentage of high-risk food premises inspected within target timescales (100% against a target of 95%). All four notifications were inspected within timescales.
- Percentage of high-risk notifications risk assessed within 1 working day (100% against a target of 95%). Six inspections were due and all inspected within timescales.
- Missed bins per 100,000 (48.58 against a target of 110)
- (Snapshot) Number of gym memberships (5,864 against a target of 5,555)

3.3 Some Service Performance below target includes:

Processing times for Council Tax Support Change Events (6.96 days against a target of 5 days) and Processing times for Housing Benefit Change of Circumstances (6.10 days against a target of 4 days)

Processing times remained above target in Q4 due to ongoing case complexity, linked to Universal Credit migration, alongside delays in customers submitting evidence. Processing was impacted by internal delays in evidencing, and manual intervention requirements particularly where Housing Benefit and CTS evidence was not clearly distinguished.

While in-quarter performance showed improvement, cumulative measures remained over target. Ongoing work is underway to better identify and triage CTS and HB evidence, alongside process reviews to further improve performance.

Percentage of Housing Benefit overpayment due to LA error/admin delay (0.42% against a target of 0.35%)

Although the error rate is higher than expected, it is less than the national threshold of 0.48% and no penalties would apply based on the final year-end figure.

In total, 2,080 Housing Benefit claims have been paid, comprising 1,842 normal claims and 238 temporary accommodation claims. Of these, 64 normal claims and 4 temporary accommodation claims were identified as having overpayments made on them.

The Council is also continuing its participation in the DWP's Housing Benefit Award Accuracy (HBAA) initiative, which provides additional assurance through joint work aimed at reducing fraud and error. The service remains mindful of the pressures created by increased workloads, including the potential for processing delays that could affect subsidy levels. Taken together, these measures are designed to reduce overpayments attributable to local authority error and support the Council in meeting expected performance levels in the final quarter of the year.

Pre-Application Planning Income (£44,495 against a target of £60,173)

In Q4, Pre-application income remained below target as applicants chose to bypass pre-application advice and submit speculative full applications directly. Also, the council decided to maintain current fees charged for local pre-application choosing to encourage uptake via initiatives such as redesigning pre-application forms, reviewing website content, and improve accessibility. The introduction of the Planning Performance Agreements (PPAs) is also expected to strengthen this drive and strengthen income recovery.

Percentage of official land charge searches completed within 10 days (62.01% against a target of 90%)

During Q4, the Council experienced a downturn in performance against the 10 day target for processing Land Charges searches. This was primarily the result of the unexpected loss of a team member, which significantly reduced capacity at a point when demand remained steady. The reduction in resource led to a buildup of outstanding cases and a temporary fall in overall service performance. In response, the service has implemented resilience measures, including bringing in additional administrative support to increase throughput and focus on clearing the older cases in the backlog. These interventions have helped stabilise day to day operations, and early performance data indicates that processing times are beginning to improve.

Percentage of household waste recycled (54.79% against a target of 61%)

During Q4, the household recycling rate fell by around 1.6% compared with the same period last year. The current performance sits at 54.79%, 6.2% below the Council's target. Recycling tonnages remain steady, but there has been an increase in residual waste of 1.81kgs per household compared to the same period last year.

Alongside operational performance, the Council continued targeted communications, promoting correct recycling of packaging, wrapping paper, cardboard, and other food waste, helping residents understand what can and cannot be recycled. The Council also regularly shares national and sector-led campaign content from organisations such as Alupro (covering aluminium packaging recycling) and Love Food Hate Waste, amplifying consistent behavioural messages when these organisations have campaigns running. These combined efforts support residents to recycle correctly and reduce contamination levels.

Nationally, recycling rates vary significantly. In 2024/25, local authorities in England recorded household recycling rates ranging from 23.7% to 63.9%, with the provisional national average at 44.3%. This wider context highlights the substantial performance gap between leading and lower-performing authorities. Within this landscape, West Oxfordshire performed strongly, ranking 14th out of 164 waste collection authorities sampled in England for 2024–2025, achieving a household recycling rate of 57%. This places it among the top councils nationally and reflects continued commitment to high recycling performance across Oxfordshire.

Despite being below target for the quarter, the Council's current rate of 54.79% remains well above the national average and consistent with Oxfordshire's reputation as one of the leading areas in England for recycling. All Oxfordshire districts continue to outperform the wider national picture, underscoring the region's strong culture of waste reduction, reuse, and recycling, supported by ongoing engagement and public-facing campaigns.

Leisure visits (255,498 against a target of 269,003)

Recorded leisure visits were below target in Q4, however, this was attributed to data-capture issues rather than reduced demand. The annual target has been exceeded with 963,766 recorded visits against a target of 843,413.

Demand for facilities remained strong, with many activities operating at or near capacity. Cleanliness remains a key performance factor with CSAT metrics from partners, GLL showing good responses.

3.4 A full report is attached at Annex C and should be looked at in conjunction with this report.

3.5 As previously agreed, where possible, broader benchmarking has been included in the full performance report to gain a more robust and insightful evaluation of performance.

4. OVERVIEW AND SCRUTINY COMMITTEE

4.1 This report will be reviewed by the Overview and Scrutiny Committee at its meeting on 3 June 2026. The draft minutes of that meeting will be circulated to all Members and any recommendations from the Committee will be reported to the 10 June 2026 Executive meeting.

5. FINANCIAL IMPLICATIONS

5.1 There are no direct financial implications from this report.

6. LEGAL IMPLICATIONS

6.1 None specifically because of this report. However, a failure to meet statutory deadlines or standards in some services may expose the Council to legal challenge and/or financial liability.

7. RISK ASSESSMENT

7.1 Contained in this report.

8. EQUALITIES IMPACT

8.1 None

9. SUSTAINABILITY IMPLICATIONS

9.1 A Sustainability Impact Assessment (SIA) is not required because it is a quarterly review report for the Executive to note.

10. BACKGROUND PAPERS

10.1 None

(END)

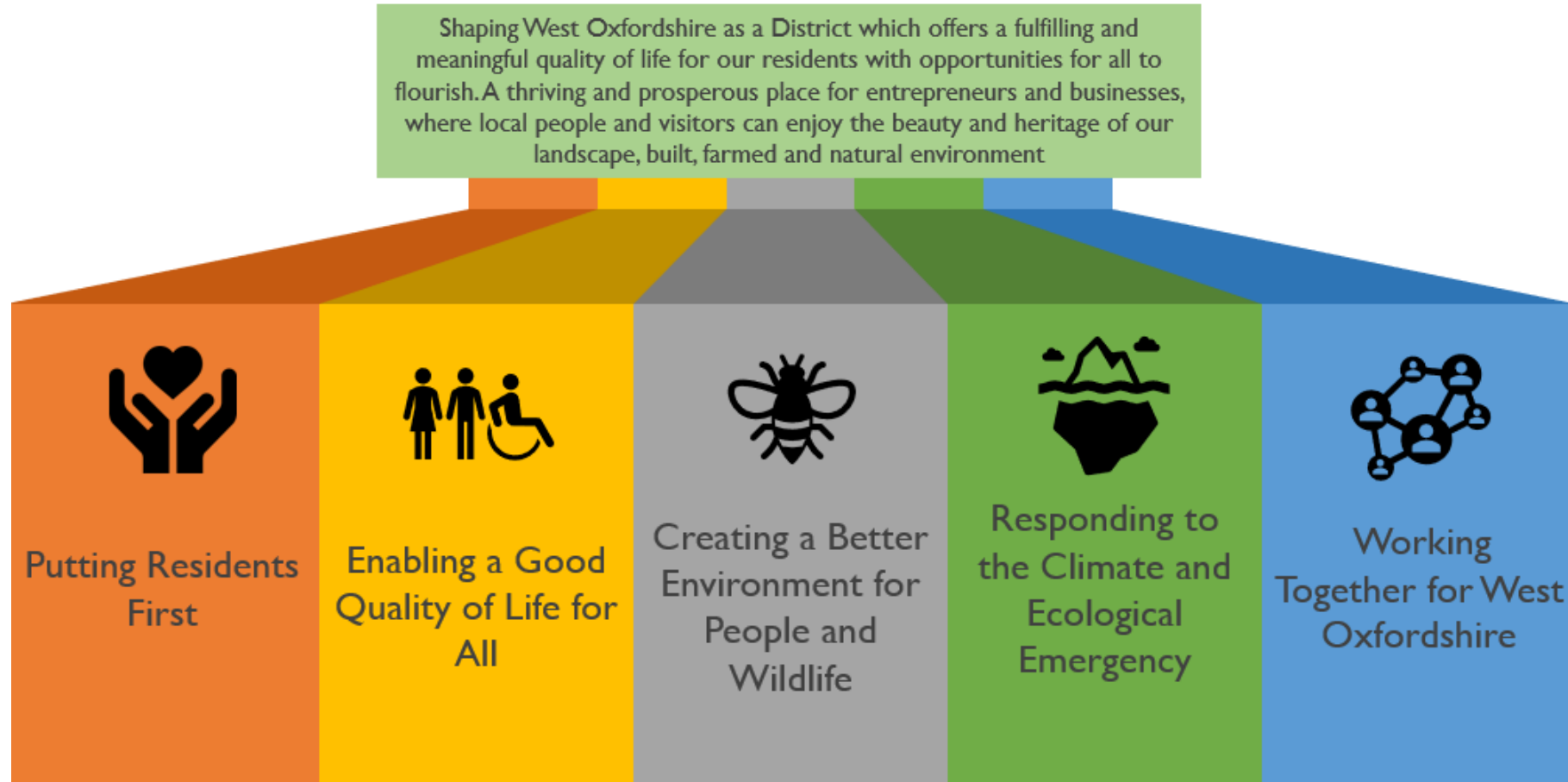


WEST OXFORDSHIRE
DISTRICT COUNCIL

COUNCIL PRIORITIES REPORT
January – March 2026

Background

The Executive Action Plan was created to outline the steps needed to carry out the vision of the Executive after the new Council Plan was adopted in February 2023. In the Council Plan, the Executive looks to the district's future and establishes a vision for West Oxfordshire. In addition to updating the public on the status of each priority at regular meetings across the plan's four-year duration, a new performance framework has been created to offer timely updates for actions taken in relation to the priorities.



Putting Residents First



Actions we are taking

In early 2022, West Oxfordshire District Council conducted its first Youth Needs Assessment, gathering structured responses from 3,908 young people attending seven secondary schools or colleges, alongside feedback from parents and youth organisations. The assessment revealed significant challenges, including limited access to activities, widespread mental health concerns, safety issues, climate anxiety, and barriers linked to education, employment, and support services. Following a review of the findings in October 2023, the Council committed to strengthening youth engagement and approved the recruitment of a full-time Youth Development Officer in February 2024. By March 2026, the officer had engaged extensively with community groups, parish and town councils, Oxfordshire County Council, Thames Valley Police, specialist youth agencies, councilors, and internal teams, reinforcing six thematic youth priorities: developing new provision, sustaining existing services, improving safety and wellbeing, supporting education and skills, promoting volunteering, and amplifying youth voice.

A key development this quarter has been the formation of the West Oxfordshire Youth Partnership, marking an important step forward in strengthening how the Council engages with young people. The partnership brings together key stakeholders and provides a coordinated approach to youth engagement across the wide range of council and partner activity. A programme of work focused on Youth Voice is now coming forward, supporting the Council's commitment to actively seek the views of seldom-heard communities and ensure that decisions reflect the needs and perspectives of younger residents. This work has been enabled through external funding secured from the Department for Culture, Media and Sport (DCMS) via Oxfordshire County Council, providing a strong foundation for delivery in the year ahead.

To support youth-led innovation, the Council allocated £20,000 for initiatives delivered through Westhive, its civic crowdfunding platform. By Spring 2025, 12 youth-focused projects had been successfully funded, attracting over £412,000 in total pledges. Westhive's broader programme continues to grow, with 38 projects supported and more than £1.16 million pledged across the platform by 2025. Within this total, 2025 funding rounds saw £124,000 committed to 14 new community projects (including young carers and arts-based initiatives), and a further £114,000 directed to projects improving accessibility, biodiversity and family services. The Council continues to pledge up to £12,000 per project, with at least £20,000 ring-fenced annually for youth-led ideas. Executive approval was secured to extend the Westhive programme for a further three years starting April 2026.

In response to ongoing cost-of-living pressures, approximately £60,000 of Household Support Funding was distributed during Q4. Funding was targeted at households experiencing financial barriers and delivered through local food groups, organisations supporting informal and formal carers, and voucher schemes for eligible residents identified through LIFT. This activity ensured support reached residents most in need through established community networks.

The Council's commitment to youth and housing is further reflected in the 'Our House' project, delivered in partnership with Cottsway Housing and Aspire Oxfordshire. The initiative provides shared, affordable accommodation and tailored employment, training, and wellbeing support for young adults under 35 on out-of-work benefits, enabling them to build independence and progress into education, employment, and long-term housing.

The Council remains actively engaged in shaping the future structure of local government through the Local Government Reorganisation (LGR) process. In February 2026, Government launched a statutory consultation on three Local Government Reorganisation proposals for Oxfordshire, including the two-unitary model supported by West Oxfordshire, which ran until 26 March 2026. The Council's Executive approved the submission of a response to the consultation, reaffirming support for the two-unitary model.

This two-unitary model is being considered alongside two competing proposals: a single Oxfordshire-wide unitary authority put forward by Oxfordshire County Council, and a three-unitary model led by Oxford City Council, featuring Greater Oxford, Northern Oxfordshire, and Ridgeway councils. All proposals will be assessed by Government, with a final decision expected in 2026 and implementation anticipated in 2028.

Enabling a Good Quality of Life for All



Actions we are taking

The Community Infrastructure Levy (CIL) went live in 2026, it is now being applied to all relevant planning permissions granted from 31 January 2026. While early concerns have been raised by developers and applicants regarding the balance between CIL and Section 106 obligations, the Council is considering how best to provide further clarity to support consistent application. Once embedded, CIL will play a critical role in funding both strategic infrastructure and local priorities, helping communities adapt to growth while maintaining quality of life. The Council has continued progress on the Local Plan Review, following the close of the spatial options consultation in December 2025. The Draft Regulation 19 Local Plan remains on track for formal publication in June 2026.

The Council has continued to make significant progress on Salt Cross Garden Village, one of the district's most important long term growth areas. The Area Action Plan and planning policy framework were adopted by the Council in February 2026, providing a clear basis for delivery. The Council is now reviewing the outline planning application against the adopted policy framework and is working closely with Oxfordshire County Council to agree the required updates and additional information from the developer. A Planning Performance Agreement has been reviewed and prepared for signing, supported by a detailed work programme and costed resource plan. Section 106 requirements have been reviewed by partners and are being updated by the Council, alongside the procurement of additional viability expertise. Engagement with Eynsham Parish Council remains constructive, including consideration of the draft Neighbourhood Plan, while the Oxford Growth Commission continues to support Salt Cross as part of the national Garden Communities programme.

Work on the Carterton Area Strategy is progressing in parallel, reflecting its close alignment with the Local Plan's vision for future growth. Early engagement has been positive, and the Oxford Growth Commission has endorsed the Council's approach. A new Interim Regeneration Lead has now been appointed for Carterton, who will begin work on the Carterton Area Strategy. This will include exploring and masterplanning opportunities for green investment across the Carterton area, working closely with the West Oxfordshire Business and Retail Park and RAF Brize Norton to identify sites and projects that can support low-carbon growth and future-focused infrastructure. As part of this wider programme, work with the Low Carbon Hub to support local businesses with their green infrastructure needs has now successfully concluded under UKSPF. This has helped build a stronger foundation for businesses looking to reduce emissions, improve energy efficiency and invest in sustainable technologies. Together, these strands form a key part of our emerging regeneration approach ensuring Carterton is well-positioned to attract green investment, support business innovation and deliver long-term economic and environmental benefits for the town and surrounding area.

Walking, wheeling and cycling infrastructure projects continue to advance across the district, the Council has also continued to work with partners to improve sustainable transport and active travel. The Carterton Local Cycling and Walking Infrastructure Plan (LCWIP) was adopted by Oxfordshire County Council in October 2025, and the Council continues to support its implementation. The Eynsham LCWIP has been refined following consultation, while the Charlbury LCWIP is with Oxfordshire County Council for further editing ahead of anticipated adoption in October 2026. A Walking Bus scheme, supported by the Council, has been introduced at Witney Community Primary School to encourage healthier travel choices.

Across town centres, regeneration and economic vitality remain priorities for the Council. In Witney, the Council is progressing the Wayfinding Signage Project in partnership with the Chamber of Trade, alongside shopfront improvement grants and wider UKSPF funded initiatives. Work continues at Marriotts Walk on public realm improvements and visitor experience, supported by CBRE in a challenging market. In Carterton, the Council has begun identifying regeneration priorities following completion of the Strategic Masterplan, alongside the submission of an Expression of Interest for Town of Culture 2028, signaling clear ambition to raise the town's profile and strengthen community pride.

In housing, feasibility work has been undertaken with a range of modular construction providers, including timber-frame SIP and container-based manufacturers, though suitable sites have not yet been identified. Separately, 28 bedspaces are in the acquisition pipeline to meet high demand from single applicants on the housing register, with properties progressing through surveys, legal checks and contract preparation. At Woodford Way, the Council continues to progress a delivery partner model for a 55 home scheme, integrating public parking and retaining existing EV charging infrastructure. Both Executive and Overview and Scrutiny have authorised further work to refine the business case. Separately, the Council continues to progress property acquisitions to relieve pressure on the housing register, with additional bedspaces moving through surveys, legal checks and contract preparation.

Creating a Better Environment for People and Wildlife



Actions we are taking

West Oxfordshire District Council has completed the Preferred Policy Options consultation for its emerging Local Plan 2041. Running from 26 June to 8 August 2025, this stage explored the updated vision, objectives and preferred policy approaches across housing, transport, climate, the economy, infrastructure, and the natural and historic environment. A Consultation Summary Report was published in October 2025, setting out the themes raised and how they are shaping the next stages of plan-making.

The Preferred Spatial Options consultation, undertaken between 3 November and 22 December 2025, built on this work by seeking views on the distribution of development, the settlement hierarchy, and whether the plan period should extend to 2043 to ensure a full 15-year horizon. Strategic sites including Salt Cross and West Eynsham were revisited, alongside exploration of additional locations around principal towns and larger villages. This stage formed a bridge between high-level policy development and preparation of the Draft Plan.

Preparation of the Regulation 19 Draft Local Plan is now underway, incorporating a strengthened and more integrated approach to the water environment, informed by updated technical evidence. Supporting studies underpinning this work set out updated principles for applying the Sequential and Exception Tests and align with national guidance and Oxfordshire's Local Flood Risk Management Strategy. Together, these will inform decisions on growth locations and future infrastructure requirements as the Draft Plan develops.

The Oxfordshire Local Nature Recovery Strategy (LNRS), endorsed by the Council's Executive in September 2025 and published in November 2025, identifies countywide habitat priorities and opportunity areas, with approximately 41% of West Oxfordshire falling within mapped opportunity areas. A Council representative attended meetings of the newly established LNRS Delivery Advisory Group, contributing to discussions on strategic project criteria, funding, and priority projects. The next project review meeting is scheduled for April–May 2026. The LNRS is already informing local delivery, including exploration of a potential land acquisition in Eynsham to support a community group as a BNG habitat bank. Partnership working remains central to delivery. A meeting was held with the Windrush Catchment Partnership on 24 March 2026, and officers are following up with the new Chair and CEO of the Wychwood Forest Trust. Continued involvement is being maintained with both the Evenlode and Windrush Catchment Partnerships across several projects to support ongoing community-level nature initiatives.

The Coronation Community Orchard Scheme has reached its final delivery stage.

- 190 trees were planted across five orchards in the third and final application round.
- 392 trees have been planted overall, across 25 orchards district-wide.
- 2 pruning workshops were delivered, with representatives from eight orchard groups in attendance.

Remaining funds have been transferred to the Long Mead Foundation to deliver orchard meadow creation workshops between April and November 2026, including propagation of local wildflowers, plug planting and soil testing, targeted at supported community orchard groups.

Work continues to link nature recovery, land management and food systems. Engagement is ongoing with the North-East Cotswold Farm Cluster on carbon sequestration, while the Food Action Plan Delivery role continues to achieve high levels of engagement with farmers and market gardeners, supporting innovation and collaboration across the local food system. Ecology and land management activity remains active. Ecological reports are under review, with proposed changes being discussed with volunteer groups at Deer Park Wood and Deer Park South. Work will continue into the next financial year to identify management changes and enhancement opportunities. The roadside verge project will also continue into next year. Ongoing activity is underway to better match resources to activity, with communication channels to be updated once complete. The Nature Connected programme continues to enhance community access to green spaces:

- Carterton – Town Council permission has been granted for works and community events; delivery is being coordinated.
- Witney – collaboration with Witney Town Council, the Lower Windrush Valley Project and Wychwood Forest Trust to coordinate walks and green space use is progressing.
- Chipping Norton – engagement with the Town Council to approve activity is underway.

As the Local Plan advances, the Council continues to align updated technical studies, the LNRS, BNG delivery work, catchment partnership activity and community-level initiatives to ensure a robust and environmentally led Regulation 19 Draft Plan for consultation in 2026, ahead of submission for independent examination.



Responding to the Climate and Ecological Emergency

Actions we are taking

West Oxfordshire District Council declared a Climate and Ecological Emergency in 2019 and remains committed to achieving carbon-neutral operations by 2030. This ambition is guided by the Climate Change Strategy 2025–2030, the Carbon Action Plan 2024–2030 and the West Oxfordshire Nature Recovery Plan, which together set a clear framework for cutting emissions, integrating climate considerations into Council services and strengthening biodiversity and climate resilience.

Progress continues on the decarbonisation of council-owned buildings, particularly leisure facilities, through the Public Sector Decarbonisation Scheme (PSDS). At Windrush Leisure Centre, the PSDS Phase 3c scheme is being delivered and includes the installation of Building Management System panels, buffer vessels, mechanical pipework, electrical containment and cabling, and a temporary meter. These works build on completed heat-decarbonisation planning and represent a significant step in reducing emissions from one of the Council's most energy-intensive operational buildings.

At Carterton Leisure Centre, earlier PSDS Phase 3b funding supported proposals to replace heating and hot water systems with a low-carbon alternative and increase on-site solar PV; however, further funding will now need to be identified and secured to proceed with full decarbonisation. While solar PV has already been installed at Carterton, additional upgrades will be required to deliver meaningful emissions reductions. Beyond the leisure estate, heat-decarbonisation plans have been completed for Elmfield, 3 Welch Way and the Old Court House, with budget provision identified for low-carbon heating and solar PV at 3 Welch Way in 2026–27. The Senior Leadership Team has confirmed there is no appetite for wider solar investment across council-owned properties ahead of Local Government Reorganisation (LGR). The Council has also made progress in reducing emissions from waste and street-cleansing operations. A depot electrification capacity assessment is currently underway, reviewing both existing electrical infrastructure and future requirements. In Quarter 4, Four electric food-waste collection vehicles and one 3.5-tonne electric mechanical sweeper have been ordered, and a trial of a larger electric mechanical sweeper is currently in progress. In parallel, work continues to update the Waste Environmental Services Programme (WESP) business case, ensuring infrastructure requirements such as depot decarbonisation and EV charging are fully reflected. Strategic planning frameworks to support decarbonisation are now largely in place.

Updates to the Carbon Action Plan to 2030 and the Climate Change Strategy to 2050 have been completed, strengthening the Council's approach to include scope 3 emissions, district-wide carbon budgets, clear route maps to net zero and defined actions. The Climate Impact Assessment Tool (CIAT) has also been completed and is now embedded as a mandatory requirement for Council projects to ensure climate and nature considerations are systematically included in decision-making. The Sustainability Impact Assessment Tool (SIAT) is also mandatory for Council decisions.

In relation to renewable energy, a Publica-wide project to install solar PV on council-owned, tenanted buildings has been paused, with Senior Leadership Team confirming there is no appetite for direct solar investment in Council-owned properties prior to LGR. Looking ahead, the emerging West Oxfordshire Local Area Energy Plan (LAEP) will include actions to support renewable energy generation across the district.

The Nature Recovery Growth bid was successful, securing new budget to deliver actions within the Nature Recovery Plan and the Local Nature Recovery Strategy (LNRS) during 2026–27. The statutory biodiversity duty report was published on 25 March 2026, and continued support is being provided to catchment partnerships, community groups, farmers and other stakeholders delivering climate and nature recovery actions on the ground. Work to support retrofit and decarbonisation of homes and businesses is ongoing. Discussions continue with the Low Carbon Hub on the CAPZero model and the potential for a district-wide rollout targeting the “able to pay” market. Draft retrofit actions from the LAEP have been reviewed, with a revised version awaited before incorporation into the West Oxfordshire LAEP. The Council is also strengthening its approach to enforcing Minimum Energy Efficiency Standards (MEES) in the privately rented sector, with reported breaches to be investigated and enforced. Delivery of Home Upgrade Grant Phase 2 (HUG2) has been completed, providing energy-efficiency and low-carbon heating upgrades for low-income, off-gas households, complementing support delivered through Better Housing Better Health.

In June 2025, West Oxfordshire was named the top-performing rural district in the national Council Climate Action Scorecards, recognising strong governance, community engagement and practical progress across areas including decarbonisation, retrofit, nature recovery and carbon-literacy training.



Working Together for West Oxfordshire

Actions we are taking

West Oxfordshire District Council is entering the final year of UK Shared Prosperity Fund (UKSPF) and Rural England Prosperity Fund (REPF) delivery, with a clear focus on ensuring continuity for communities and businesses as national funding winds down. Final allocations for 2025/26 have been confirmed as £327,146 (UKSPF) and £214,829 (REPF), extending the district's Prosperity Fund programme into a fourth year and supporting local investment through March 2026. A celebration event is planned for June 2026 to recognise the achievements of UKSPF and REPF projects and the impact delivered across the district.

A strengthened programme of business support schemes has been launched to help local enterprises innovate, grow and future-proof their operations. This includes the new West Oxfordshire Business Boost Grant, offering up to £5,000 in capital funding for equipment, expansion and low-carbon investment, opening formally in September 2025. It complements existing schemes such as Shop Front Improvement Grants (up to £1,000), Visitor Economy Grants (£1,000–£10,000) and Rural Enterprise Growth Grants (£5,000–£20,000), all refreshed in June 2025. Six-month impact reporting for the 2025 rounds begins in October. Business and environmental sustainability support continues through the Carbon Action Fund, which has seen strong uptake, and the Tools for Tomorrow initiative, which continues to address skills shortages in the construction and retrofit sector. Wider support also includes delivery of the West Oxfordshire Business Support Programme (June 2025–January 2026), offering Business Sparks and Business Accelerator provision for start-ups and scaling businesses. The Council continues to support Town and Parish Councils to represent their communities and take action on locally important issues. The UKSPF-funded Towns and Parish Biodiversity Project has now been completed, providing practical case studies to support communities in enhancing biodiversity across a range of local habitats.

The Westhive civic crowdfunding programme continues to act as a flagship for community-led investment. By the end of Round 4 (July 2025), the platform had supported 28 projects worth £948,172. A further Round 6 has since been completed, with 10 additional projects receiving pledges. The Council has also invested an additional £60,000 in the Westhive Community Infrastructure Fund to support projects focused on youth engagement, inclusion and mental health. Executive approval has been secured to continue the Westhive programme for a further three years from April 2026. In 2024/25 alone, £273,682 in UKSPF support was channeled into VCS projects through Westhive. Recent Westhive-supported initiatives include:

- **Let's Roll!** - inclusive wheelchair dance classes, now fully funded for continued delivery and hosting a national competition in 2026.
- **Carterton Family Centre** - receiving funding to expand low-cost provision for young families.
- **Community Floodplain Restoration** - creating new meadows and wet woodland to boost biodiversity and natural flood management.

The Council's Youth Development Officer has supported emerging youth-led projects in Stonesfield, Freeland and Eynsham, while a new Youth Partnership with Witney Town Council and Thames Valley Police focuses on inclusion and safeguarding. The YouMove programme now supports more than 500 families in West Oxfordshire and has seen a significant rise in activity levels countywide, with nearly 14,000 residents registered by mid-2025.

Engagement with the Voluntary and Community Sector (VCS) remains strong, supported through forums in key settlements and biannual Health and Wellbeing Alliance meetings. In 2025/26, a total of 25 awards were made through Westhive, while eight programmes continue to be supported through the SLA scheme. Further Household Support Funding has also been distributed to food groups and organisations supporting informal and formal carers. Business and environmental sustainability support continues through the Carbon Action Fund, which has seen strong uptake and has been submitted for consideration in the LGC Awards. This fund, worth £10,000–£20,000 per grant, targets SMEs seeking to decarbonise buildings, install renewables, or invest in waste-reduction equipment. The Tools for Tomorrow initiative also remains active, addressing skills shortages in the local construction and retrofit sector. [news.westoxon.gov.uk] Wider economic development initiatives include the West Oxfordshire Business Support Programme (June 2025–January 2026), delivered by ALP Synergy, offering a combined cycle of Business Sparks and Business Accelerator support for start-ups and scaling firms. The Leisure Cards scheme, delivered through GLL, also continues to offer free leisure access for residents experiencing poor mental health.

Together, these programmes and investments reflect the Council's commitment to sustaining the impact of the Prosperity Funds beyond their national end date, strengthening community resilience, supporting business growth, and ensuring that local priorities continue to be delivered through 2026 and beyond.

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Corporate Strategy Action Tracker

Green	On target	
Amber	Off target but action being taken to ensure delivery (where this results in a reviewed target date, this is made clear in the table)	
Red	Off target and no action has yet been agreed to resolve the situation	
In Progress	Work on the action is underway, though a fixed timeline has not yet been set.	
Complete	Action completed	
Not Scheduled to Start	The action/project has either a future start date or is still in its early stages, with no start date established yet.	

	Our Focus	Actions	Quarter 4 Update	Start Date	Date Due	Status	Executive Member	Link Officer	Updates Provided by
1.1	<p>Putting Residents First</p> <p>The Council will listen and act in the best interests of residents by:</p> <ul style="list-style-type: none"> -Being an outward facing, accessible, inclusive and open Council, improving our use of technology to increase understanding and access to what we do, how we work and the decisions we take -Providing easy to use platforms for public consultations that are effective, accessible and timely so that the voice of residents can be heard in planning and other Council decisions -Positively engaging with and listening to locally elected representatives on Town and Parish Councils -Actively seeking the voice of the seldom heard, including those of young people, to understand their particular needs and ensure that the Council is taking decisions that meet these needs. 	<p>Explore how the Council leads Youth Engagement, ensuring youth are engaged across the wide range of activity it undertakes.</p>	<p>New West Oxfordshire Youth Partnership is formed and a programme of work looking at Youth Voice is coming forward - this is being enabled with funding secured from DCMS via OCC</p>			On Target	Rachel Crouch	Heather McCulloch	Heather McCulloch
		<p>Customer Experience Improvement Programme</p>	<p>Completed</p>	01/07/2020	01/01/2024	Complete	Andy Graham	Giles Hughes	Michelle Clifford

1.2	Putting Residents, Young and Old, at the Heart of What We Do	The Council will act with outstanding levels of transparency and accountability, with high standards of governance and trustworthiness.	<p>Proposal to implement a robust system and process for:</p> <ul style="list-style-type: none"> > the allocation of matters to the councils' forward plans > report preparation, consultation and approval > transparency and publication of decision making; and > decision tracking. 	Completed	01/05/2021	31/12/2023	Complete	Andy Graham	Giles Hughes	Andrew Brown
1.3		The Council will actively manage Council budgets, delivering good levels of service through the wise and efficient use of funds available as well as enabling those budgets to grow so that the Council can take action towards the priorities of this Council Plan.	Procurement: Publica-wide project to embed climate, ecological and social value considerations in procurement processes to maximise the use of sustainable suppliers and support local businesses.				In Progress	Alaric Smith	Ciaran O'Kane / Claire Locke	Ciaran O'Kane
		Ensure the timely provision of built and green infrastructure which meets the needs of existing and incoming residents and that supports health and care to enable physical and mental well-being, community cohesion and delivers a high quality of life.	Adopt and implement CIL (Community Infrastructure Levy).	CIL has now gone live with effect from 31 January 2026 and is being applied to all relevant planning applications with effect from this date on. Some concerns have been raised by developers/applicants in terms of the balance of S106 planning obligations alongside CIL and Officers are considering how to provide additional clarity in this respect.	01/11/2019	31/08/2024	Off Target but Mitigation in Place	Hugo Ashton	Giles Hughes / Chris Hargraves	Chris Hargraves
			Commission (Sport England) Strategic Outcomes Planning Model (SOPM) through Max Associates to inform a West Oxfordshire Leisure, Health and Wellbeing Strategy which will define a more holistic leisure provision offer (inc. arts, culture, entertainment and sport). The SOPM will also inform the Infrastructure Delivery Plan (and Local Plan Review) and Town Centre regeneration plans.	Completed	01/09/2023	20/11/2024	Complete	Tim Sumner	Rachel Biles	Rachel Biles
2.1	Enabling a Good Quality of Life for All	Explore opportunities for green investment for strategic development areas eg through the Carterton Masterplan and also through the Pan-Regional Partnership.		<p>A new Interim Regeneration Lead has now been appointed for Carterton, who will begin work on the Carterton Area Strategy. This will include exploring and masterplanning opportunities for green investment across the Carterton area, working closely with the West Oxfordshire Business and Retail Park and RAF Brize Norton to identify sites and projects that can support low-carbon growth and future-focused infrastructure.</p> <p>As part of this wider programme, work with the Low Carbon Hub to support local businesses with their green infrastructure needs has now successfully concluded under UKSPF. This has helped build a stronger foundation for businesses looking to reduce emissions, improve energy efficiency and invest in sustainable technologies.</p>	01/01/2023	31/08/2025	On Target	Tim Sumner, Andrew Prosser	Sam Stronach	Sam Stronach

Explore how the Local Plan can address the issue of securing long term maintenance of green infrastructure on large SDAs.	As per the previous update, the draft Regulation 19 Local Plan remains in progress with a view to formal publication in June 2026. Policies will address the issue of maintenance and stewardship of community assets including green infrastructure.	31/08/2022	31/08/2025	On Target	Andrew Prosser	Chris Hargraves	Chris Hargraves
Consideration of community stewardship and maintenance of Strategic Development Areas – how do we enable this?	As per the previous update, the draft Regulation 19 Local Plan remains in progress with a view to formal publication in June 2026. Policies will address the issue of maintenance and stewardship of community assets including green infrastructure.	31/08/2022	31/08/2025	On Target	Andrew Prosser	Chris Hargraves	Chris Hargraves
Work with Oxfordshire County Council and others to increase the opportunity for residents to travel around and beyond the District on foot or by bike, or on public transport, to reduce car dependence and benefit from the health and economic benefits of doing so.	The Eynsham LCWIP has been adopted by OCC. West Oxfordshire's final LCWIP, Charlbury, is currently with OCC for further editing and is scheduled for adoption in October 2026. Once the Charlbury LCWIP has been adopted, attention will shift to updating existing LCWIPs, starting with the earliest adopted plan, the Witney LCWIP. Walking Bus scheme introduced at Witney Community Primary School to enable schoolchildren to walk to school.	10/09/2021		In Progress	Andrew Prosser	Hannah Kenyon	Hannah Kenyon
Explore the scope for alternative means of delivering the range of homes in the District that meet the diverse needs of our communities, such as investment in tenures and sizes of homes that the market does not currently deliver enough of.	Strategic Housing Project: Internal management and modelling – proposals to be presented to Executive in paper compiled by Publica Assistant Director Planning and Sustainability to November Executive.	01/04/2023	15/11/2023	Complete	Geoff Saul	Giles Hughes	
	Strategic Housing Project: Assessing scope for investment and modelling.	01/04/2023		On Target	Alaric Smith, Geoff Saul	Giles Hughes	Michael David
	Strategic Housing Project: Overview of modelling options and delivery. Proposed approach to the November Executive.	01/04/2023	15/11/2023	Complete	Tim Sumner, Geoff Saul	Giles Hughes	

The Council will be a hive of activity to help build and support thriving towns and villages that provide residents with a high quality of life by supporting a vibrant local economy, homes and infrastructure

Further exploration of the best route to be more interventionist in housing delivery via direct provision – clarity needed over the desired objectives of establishing the council owned housing company or pursue an alternative route eg via a Joint Venture (OxPlace/Oxfordshire wide).	Partnership working with RP's and delivery partners has proved to be the most effective way to achieve the desired outcomes (i.e. - increasing delivery of social rented homes and genuinely affordable homes to residents of West Ox in need). This delivery route has optimised outputs as demonstrated by GOV statistics showing a 60% increase in Social rented homes in the last 24months (the highest proportion of social rented homes in over a decade). This has been achieved through strategic intervention with key RP's, negotiation on specific applications and 'additionality' leveraged through increased Homes England funding. (source: https://www.gov.uk/government/statistical-data-sets/live-tables-on-affordable-housing-supply). Other routes are available but they are more dependent on land transactions, availability of capital, viability and a longer timeframes to enable lesser outcomes.	01/04/2023		On Target	Geoff Saul	Giles Hughes	Michael David
Development of business cases for existing Council owned sites – initial focus should be on Woodford Way – a housing scheme which integrates carparking (what is needed/tie in with EVPC). Key landowners/development partners.	The approach at Woodford Way is to work with a delivery partner to appraise and assess the land opportunity, which will then feed into pre-app and planning application discussions. The model is to transfer the land to a delivery partner / RP so that they take on the planning and construction risk. The RP delivery partner will also take on the financial liability and make the necessary applications to Homes England for grant funding. The Council's role is to facilitate that process but not be financially or legally liable for it. The executive have earmarked £215,000 to assist the viability of the scheme which may assist in supporting the scheme if required. The current business case has been put to the Executive on the 14th Jan and Overview and Scrutiny committee on the 26th March. The scheme comprises of 55 dwellings (maisonettes & flats) which enables 84 public parking spaces on-site (retaining existing EVCP's in situ) and makes use of additional capacity at	01/04/2023		On Target	Geoff Saul	Michael David	Michael David
Further exploration of modular building – how, where and with whom including visits manufacturers. To understand options for delivery.		01/04/2023		On Target	Geoff Saul	Giles Hughes	Michael David
Emergency accommodation – Acquisition of - consider the balance – single/couple and family accommodation).	2 buildings have been acquired and improvement works due to commence in April. Acquisition of other buildings progressing			In Progress	Geoff Saul	Claire Locke	Michael David
Completion of housing development at Walterbush Road, Chipping Norton.	Project goal amended to working with Community Land Trust and/or Registered Provider to progress a land transfer for use as social rented/affordable housing	01/10/2021	31/07/2023	In Progress	Geoff Saul	Jasmine McWilliams	Jasmine McWilliams
Deliver the Local Authority Housing Fund as a means to relieve pressures on short term accommodation and bridging hotels with a longer term of objective to see the housing being used for more general affordable purposes.		01/04/2023	31/09/2024	Complete	Geoff Saul	Claire Locke	

2.4	that meet people's needs, excellent health and wellbeing and ensuring equal access to opportunity for all.	Work with partners to support a vibrant local economy which gives residents the opportunity to prosper and fulfil their ambitions through secure jobs and exciting careers, entrepreneurship and developing new skills to participate in and contribute to the local economy.	Work with Carterton Town Council and other relevant stakeholders to identify economic regeneration priorities for the town and immediate area following completion of the UKSPF funded Carterton Strategic/Master Plan.	Dedicated officer appointed in Feb 2026 and has begun meeting with key stakeholders for the area. Early proposals for the strategy are under development based on previous engagement and analysis. Alignment is underway with the development of the new Local Plan, in particular to ensure improved coordination of planned growth and how it can provide the facilities and infrastructure that current and future communities need. An Expression of Interest was submitted for Carterton as part of the government's UK Town of Culture (2028) programme, one part of starting to raise the profile and aspirations for the area.			In Progress	Tim Sumner	Michael Rich	Michael Rich
			Strategy and plan for reinvigorating the District's Charter Markets	Completed			Complete	Duncan Enright	Sam Stronach	Sam Stronach
2.5			Set future project priorities for Council and Stakeholders to secure the long term viability of our Market Towns via enhancements inc wayfinding & signage, public realm and support for independent retailers and appropriate market promotions/attractions.	The remaining Signage Project is progressing well, with plans to secure Section 106 funding to deliver a robust, future-proofed signage package for Witney. This work will be further enhanced through Oxfordshire County Council's Witney High Street Improvement Project, ensuring a coordinated and high-quality approach to movement and visitor experience in the town centre. The Shop Front Improvement Grant, supported through UKSPF, is also nearing completion, with 14 grants awarded to help local high-street businesses improve their frontages and enhance the overall look and feel of the town centre. Public realm improvements remain on track, with designs now being finalised and additional Section 106 funding expected to support delivery. To strengthen our understanding of how the town centre is performing, we are also in the process of securing a new footfall counter, which will provide valuable data to inform future investment and decision-making.	01/12/2022	31/05/2025	Off Target but Mitigation in Place	Duncan Enright	Sam Stronach	Sam Stronach
			Oxfordshire County Council improvements to Witney Town Centre linked to Marriots Walk redevelopment where appropriate.	Following a meeting with WODC and OCC Leaders. Work due to commence May 2026 with completion due October 2026.			Off Target but Mitigation in Place	Duncan Enright	Sam Stronach	Sam Stronach
			Guide the future delivery of Salt Cross new garden village and associated infrastructure to enable delivery of Salt Cross Science Park.	Salt Cross Area Action Plan - Planning policy and framework plan adopted by WODC February 2026. Milestone complete. Outline Planning application submitted (2020) now reviewed against the 31 policy Area Action Plan. WODC and OCC (co-ordinated by WODC) have agreed the required updates/ additional information required from the applicant GDL. A PPA has been reviewed, updated and prepared for signing. A work plan and costed resources have been set out / defined for WODC / OCC. Ambition to complete OPA updates by Autumn 2026 ready for WODC to consult / review ready for committee report. Sec 106 list reviewed by OCC and EPC and updated. WODC currently updating Sec 106. WODC to procure viability expertise following on from AAP viability expertise.	01/01/2018	31/12/2034	On Target	Duncan Enright	Andrea Clenton	Andrea Clenton
			Marriotts Walk – implementation of CBRE recommendations inc. securing new tenants, public realm improvements & making enhanced use of the square.	Work ongoing with CBRE to manage void units in a challenging market. All units occupied except Unit 10. Public Realm designs agreed by Executive and procurement now progressing.			On Target	Duncan Enright	Jasmine McWilliams	Jasmine McWilliams

<p>Development of the Carterton Strategic/Master Plan to regeneration the town and in doing so redressing balance between housing development with investment in the town centre, leisure and culture facilities, community space and business opportunities. Will seek to determine the best way to maximise the economic benefit of the RAF's largest airbase for the town and immediate area.</p>	<p>An Interim Carterton Area Regeneration Lead has now been appointed. A dedicated Working Group has been established to drive this forward, bringing together key partners to shape priorities, identify opportunities and coordinate activity across the town.</p> <p>An Expression of Interest has been submitted for Carterton to become a Town of Culture, signalling our ambition to celebrate local identity, strengthen community pride and attract new cultural investment. This forms an important first step in positioning Carterton as a place with creativity, energy and potential at its core.</p>	01/02/2022	31/05/2025	Off Target but Mitigation in Place	Alaric Smith, Hugo Ashton, Geoff Saul, Tim Sumner	Sam Stronach	Sam Stronach	
<p>Work with others, and fulfil our statutory obligations, to ensure that land, air and water support biodiverse habitats, reduce pollution and bring about nature recovery to the District, putting it at the forefront of local decision making.</p>	<p>Ubico Grounds Maintenance Contract – review contract with aim of securing both biodiversity enhancements and budgetary savings.</p>	Ongoing activity in matching resource to activity, Communication channels will be updated once complete	01/04/2025	01/03/2026	On Target	Lidia Arciszewska	Si Pocock-Cluley	Si Pocock-Cluley
<p>Biodiversity Land Management Plans - Working with Ubico to change land management processes across key WODC sites, for example reduced mowing frequency, creation of urban meadows, changes to floodplain meadow management, invasive species action, subsidence works, to improve them for both wildlife and people.</p>	<p>Ecological reports are still under review and proposed changes are being discussed with the local volunteer group at Deer Park Wood and Deer Park South. Work will continue to identify management changes and enhancement opportunities into the next financial year. The roadside verge project will also continue into next year.</p>	01/02/2022	01/03/2026	On Target	Lidia Arciszewska	Si Pocock-Cluley / Hannah Kenyon / Mel Dodd	Mel Dodd	
<p>Support DEFRA funded Landscape Recovery Project (contiguous with the Evenlode and Windrush Catchments) in partnership with the North East Cotswolds Farmer Cluster and the Oxfordshire Local Nature Partnership.</p>				In Progress	Lidia Arciszewska			

			Windrush in Witney funding bid, in partnership with Wychwood Forest Trust - Landscape-scale enhancements across the Witney Floodplains, working with OCC, WTC and Wychwood Forest Trust to introduce grazing, improve floral diversity, pollard willow trees, establishment of a new volunteer group and delivery of a series of community engagement/rural skills training events.	The project review meeting is scheduled for April-May 2026. In the meantime, a meeting was held with Windrush Catchment Partnership on 24th March 2026 to review other ongoing projects. WODC officers are following up with the CEO and new Chair of Trustees of Wychwood Forest Trust.	01/05/2022	01/03/2025	Off Target but Mitigation in Place	Andrew Prosser	Mel Dodd	Mel Dodd
			Coronation Community Orchard Scheme	190 trees were planted in the third and final round of orchard applications across 5 orchards. 392 trees were planted across the scheme, totalling in 25 orchards across the district. 2 pruning workshops were run, each with 15 attendees representing 8 orchard groups. One session targeted at formative pruning and the other on maintaining an older orchard. The remaining funds have been transferred to the Long Mead Foundation to deliver orchard meadow creation workshops from April to November 2026. Activities will include propagation of local wildflowers, plug planting, and soil testing, targeted at community groups that received funding through the Coronation Community Orchard Scheme.	01/11/2023	21/03/2025	Complete	Andrew Prosser/Lidia Arciszewska	Mel Dodd / Hannah Kenyon	Mel Dodd
3.2		Recognise and support the vital role of farming in natural ecosystem conservation, local food production and economic resilience, and the role that environmentally sustainable farming can play in achieving this.	Engaging with farmers as part of a wider consideration of the District's rural economy. How can WODC work to support (within its powers) a strong local rural economy, including diversification and the visitor economy.	Ongoing engagement will continue with the North East Cotswold Farm Cluster on carbon sequestration and related liaison activities. Through the Food Action Plan Delivery role achieving high levels of engagement with agribusinesses - farmers & market gardeners - seeing lots of innovation and with lots of positivity about building alliances across the food system locally			In Progress	Lidia Arciszewska, Andrew Prosser	Chris Jackson / Hannah Kenyon	Hannah Kenyon
3.3		Help people to connect with nature by improving understanding of and public access to green spaces and the countryside.	Deer Park South Access Project – Infrastructure improvements to enhance public access to woodland adjacent to strategic development area.	Completed	01/12/2022	31/05/2025	Complete	Duncan Enright	Hannah Kenyon	Hannah Kenyon
			Tackling inequalities in nature	Nature Connected Carterton - Town Council have granted permission for works to be carried out and for community events to be hosted. Events are being coordinated. Witney - collaboration with Witney Town Council, Lower Windrush Valley Project and Wychwood Forest Trust to coordinate walks and use of green spaces is progressing. Chipping Norton - connecting with the Town Council to approve work is progressing.			On Target	Andrew Prosser	Heather McCulloch / Melanie Dodd	Mel Dodd / Heather McCulloch
	The Council will be a progressive custodian of our environmental resources	Be an active participant in the Oxfordshire Local Nature Partnership and contribute to the production of the Local Nature Recovery Strategy to establish priorities and map proposals for action to drive nature's recovery, achieve Biodiversity Net Gain and provide wider environmental benefits specific to West	Officer group to convene with Local Nature Partnership - maintain relationship with LNP and work with partners to develop workstreams.	A WODC representative attended meetings of the newly established LNRS Delivery Advisory Group, providing input on strategic project criteria, funding, and the list of strategic projects.	01/07/2022	01/07/2025	On Target	Lidia Arciszewska, Duncan Enright	Hannah Kenyon / Mel Dodd	Mel Dodd

3.4	Resources, supporting a healthy natural landscape and functioning ecosystem which is rich in wildlife and habitats that are enjoyed by and benefit all.	Oxfordshire.	Explore the potential for the Council to acquire land for Biodiversity Net Gain and nature-based carbon sequestration.	An opportunity to acquire land in Eynsham to support a local community group, as a potential BNG habitat bank, is currently being investigated.	8/12/2024	31/03/2026	On Target	Andrew Prosser	Hannah Kenyon / Mel Dodd	Mel Dodd
		Work with others to facilitate environmentally sensitive flood management of our river catchments.	Support of the Catchment Partnerships including the promotion (where appropriate) of other water quality campaigning groups. Sewerage and Water Agency Group continue to facilitate (Links with the Pan Regional Partnership – Scoping and Modelling Work).	Continued involvement is being maintained with the Evenlode and Windrush Catchment Partnerships. The Evenlode Catchment Partnership and Wild Oxfordshire were invited to attend the Executive on Tour meeting in Charlbury on 11th March 2026. Collaborative work with both the Evenlode and Windrush Catchment Partnership continues, across several projects.			On Target	Lidia Arciszewska, Andy Graham	Hannah Kenyon / Melanie Dodd	Mel Dodd
3.5			Delivery of the Local Plan – overview including how can the site allocations process through the Local Plan review play a positive role in water management? Coordination of policy. Linked to 4.2.	Draft water environment policy reviewed by Environment Agency and comments provided.	01/06/2022	31/12/2024	On Target	Hugo Ashton	Chris Hargraves / Hannah Kenyon	Chris Hargraves
		Drive down carbon emissions from Council operations including leisure, waste and street cleansing and running of the Council's estate, and in so doing lead by example to inspire others to take action to collectively reduce the overall carbon emissions of the District.	Decarbonisation of council owned buildings, including leisure centres and sports pavilions – secure external PSDS funding and extend the MEES project to include the full decarbonisation of tenanted buildings.	PSDS 3c Windrush Leisure Centre - Installation of BMS panels, buffer vessels, mechanical pipework electrical containment and cables, and temporary meter.			On Target	Andrew Prosser, Dan Levy, Alaric Smith	Hannah Kenyon	Hannah Kenyon

Decarbonisation of council owned buildings, including leisure centres and sports pavilions – secure external PSDS funding and extend the MEES project to include the full decarbonisation of tenanted buildings.	These projects will be explored as part of a post LGR decarbonisation programme, subject to political and financial support.			Off Target	Andrew Prosser, Dan Levy, Alaric Smith	Hannah Kenyon	Hannah Kenyon
PSDS 3b funded Carterton Leisure Centre decarbonisation - Carbon reduction through the replacement of the heating and hot water system of the building with a low-carbon alternative and increasing the amount of solar PV on site.	A Government funded scheme to maximise the amount of Solar PV on the Carterton Leisure Centre was completed earlier in the financial year and further decarbonisation of Carterton Leisure Centre is intended to form part of the post LGR decarbonisation programme, subject to funding and political support.			Off Target	Andrew Prosser, Tim Sumner	Hannah Kenyon	Hannah Kenyon
Waste Vehicle Strategy - Supporting the Waste team on the development of the strategy to reduce emissions from the Council's waste vehicle fleet.	A depot electrification capacity assessment is currently underway, evaluating both existing infrastructure and future potential. Second-generation electric vehicles are not yet in production, so their long-term reliability remains unproven. Four electric food waste collection vehicles and one 3.5-tonne mechanical sweeper have been ordered. In addition, a trial of a larger electric mechanical sweeper is currently in progress.			On Target	Lidia Arciszewska	Si Pocock- Clulely / Hannah Kenyon	Si Pocock-Clulely / Hannah Kenyon
Carbon Action Plan to 2030 and Climate Change Strategy to 2050 - Update of the Carbon Action Plan and Climate Change strategy to include scope 3 emissions, district carbon budgets, route maps to net zero, and actions.	Completed	01/07/23	30/6/2024	Complete	Andrew Prosser	Hannah Kenyon	Hannah Kenyon
Climate Impact Assessment Tool (CIAT) – Develop the tool as a mandatory requirement on projects so as to embed climate and nature considerations in council decision making.	Completed	01/02/2023	01/04/2024	Complete	Andrew Prosser	Hannah Kenyon	Hannah Kenyon
Solar PV project for tenanted buildings - A Publica-wide long-term project to install rooftop solar panels on council owned buildings, increasing the amount of renewable energy generated in the District.	SLT has confirmed there is no appetite for solar investment in council-owned properties pre-LGR.	01/08/2022	01/12/2023	Off Target	Andrew Prosser	Hannah Kenyon	Hannah Kenyon

4.2	The Council will be a community leader in responding to the challenges of climate change, including rapidly reducing greenhouse gas emissions and preparing the District and its communities for the impacts of climate change to ensure a fair transition for all to a future that will be defined by climate change.	Encourage the use of nature based solutions to sequester carbon and combat the risks arising from climate change at a river catchment scale, such as restoration of meadows and trees to reduce flooding and improve water quality.	Biodiversity Action Plan – Develop and deliver workstreams to restore nature and enhanced biodiversity in the District.	The Nature Recovery Growth bid was successful, and a new budget will be available for implementing actions in the Nature Recovery Plan and the LNRS in 2026–27. The biodiversity duty report was published on 25th March 2026, in line with statutory requirements. Continued support is being provided to catchment partnerships, community groups, farmers, and other stakeholders to deliver nature recovery and climate-related actions on the ground.	01/03/2023		On Target		Hannah Kenyon / Mel Dodd	Mel Dodd
4.3		Work with partner organisations and residents to facilitate the retrofit of carbon reduction measures in homes and businesses and pursue a drive to net zero carbon buildings in new developments through planning policy	Consider how proactive should WODC be in facilitating retrofit for the 'able to pay' market.	Discussions are ongoing with the Low Carbon Hub regarding the CAPZero model and a potential district-wide rollout. Draft LAEP actions on retrofit have been reviewed, and the revised version is awaited. These actions will subsequently be incorporated into the West Oxfordshire LAEP.			In Progress	Andrew Prosser	Hannah Kenyon	Hannah Kenyon
		Greenlight – nature and online hub to facilitate community action for a greener future.	Continue to engage with a range of stakeholders on climate mitigation and adaptation.			In Progress	Andrew Prosser	Hannah Kenyon	Hannah Kenyon	
		Minimum Energy Efficiency Standards (MEES) project for tenanted buildings - A Publica-wide review of tenanted buildings to determine what measures are needed to bring the EPC rating up to a B or above by 2030.	Reported breaches of MEES for privately rented homes will be investigated and enforced.	01/07/2023		On Target	Andrew Prosser	Hannah Kenyon	Hannah Kenyon	
		Home Upgrade Grant Phase 2 (HUG2) - A countywide scheme to upgrade energy efficiency and low carbon heating for low-income householders in the worst performing off-gas grid homes.	Completed	01/06/2023	01/03/2025	Complete	Andrew Prosser	Hannah Kenyon	Hannah Kenyon	
4.4	Encourage renewable energy generation at appropriate sites in the District, improving local energy and economic resilience and supporting the community benefits that this resilience will bring.	Explore opportunities with partners to encourage renewable energy within the District.	The West Oxfordshire LAEP will include actions on renewable energy generation. The draft core climate policy already incorporates renewables, and a draft community policy has also been prepared, which sits outside of planning.			On Target	Andrew Prosser	Giles Hughes / Hannah Kenyon	Hannah Kenyon	
4.5	Work with Oxfordshire County Council to deliver on our joint commitment to active travel and public transport, including through improved walking, cycling and public transport infrastructure and better public transport services.	Install EV charging points across the District.	The Council is in contract with EZ-Charge, the chargepoint operator, and a kick-off meeting has been scheduled for early April 2026.	26/05/2023	01/01/2025	Off Target but Mitigation in Place	Andrew Prosser	Hannah Kenyon	Hannah Kenyon	

5.1	Working Together for West Oxfordshire	Target available Council grant budgets to proposals by other organisations that will deliver on Council priorities.	Enable delivery of agreed project interventions on Government approved Investment Plan under UKSPF and REPF.	<p>An extension has now been granted for all UKSPF and REPF funding, with the programme running until 30 September 2026. Several projects are taking the opportunity to utilise remaining underspend and extend their delivery, which reflects the Government's intention to support programmes that started later due to delays in allocations.</p> <p>Delegated Authority for Cllr Duncan Enright has also been extended to 30 September 2026, ensuring decisions can continue to be made efficiently during the final phase of delivery.</p> <p>With the programme now moving into its closing period, both the Delivery Group and Partnership Board have concluded their work. To mark the achievements across the district, a UKSPF/REPF Celebration Event is planned for June 2026, bringing together partners, businesses and community organisations to recognise the impact of the programme.</p>			Off Target but Mitigation in Place	Duncan Enright	Sam Stronach	Sam Stronach
		Successful implementation of new Grant Scheme: a) Crowdfunding, b) Community and Voluntary Sector Service Level Agreements and c) Youth initiatives.	<p>a) Round 6 of Westhive is complete.</p> <p>b) Hosted a meeting with all SLA recipients to review progress and build connections and alliances. Monitoring is ongoing. End of year reviews will be held in May/June.</p> <p>c) The DCMS OCC Youth pilot is providing resources to develop capacity and build resilience of youth sector organisations</p> <p>d) In this quarter distributed around £60k of Household Support Funding to those facing financial barriers - through grants to food groups and organisations supporting carers and vouchers to those eligible for certain benefits and identified on LIFT.</p>	01/12/2022	31/05/2025	On Target	Alaric Smith with Rachel Crouch, Andrew Prosser and Lidia Arciszewsk	Heather McCulloch	Heather McCulloch	
		Support Town and Parish Councils to represent their communities energetically and take action on issues important to their locality.	Towns and Parish Biodiversity project– UKSPF funded project to provide case studies for communities on how to enhance biodiversity in different habitats.	Completed	01/12/2022	31/05/2025	Complete	Andrew Prosser	Hannah Kenyon	Hannah Kenyon
5.4		Support the Voluntary and Community Sector to continue to undertake activity which serves the needs of residents including established organisations and more informal groups working to address particular needs such as access to food, youth support and cultural provision.	Community Grants	Support continues to be provided to the Voluntary sector through a range of grant schemes and forums. In 2025/26 a total of 25 awards were made by the Council to projects on Westhive. In addition 8 programmes are supported through the SLA scheme. Latest round of Household Support funding has distributed further support to food groups and organisations supporting informal and formal carers.	01/12/2022	31/05/2025	On Target	Rachel Crouch	Heather McCulloch	Heather McCulloch

		<p>Make a dedicated effort to further understand and meet the needs of our young people and support their mental health, including children, teenagers and young adults leaving school, entering the world of work and/or seeking to set up home in the District.</p>	<p>Focussed programme of engagement with young people, and other groups, on mental and physical health, local facilities and spaces for young people, to ensure future leisure, sport, culture and arts provision in the District best provides for these.</p>	<p>Youth Dev officer is leading the DCMS funded OCC Youth Transformation pilot in West and this is leading to a range of programmes - including the new Youth Partnership, organisational development for Youth providers, a Youth voice programme and a Digital programme</p>			<p>On Target</p>	<p>Rachel Crouch, Tim Sumner</p>	<p>Heather McCulloch</p>	<p>Heather McCulloch</p>
			<p>Have Your Say Events – focussed topic event for young people.</p>	<p>No plans for Have Your Say Events at this stage. Other types of engagement activities are underway.</p>			<p>In Progress</p>	<p>Rachel Crouch</p>	<p>Heather McCulloch</p>	<p>Heather McCulloch</p>



WEST OXFORDSHIRE
DISTRICT COUNCIL

Delivering great services locally

PERFORMANCE REPORT:
January – March 2026

Summary Index

Area	KPI Name	RAG	Page
Revenues, Benefits and Housing	Percentage of Council Tax Collected	Green	6
	Percentage of Non Domestic Rates collected	Orange	7
	Processing times for Council Tax Support new claims	Orange	8
	Processing times for Council Tax Support Change Events	Red	9
	Processing times for Housing Benefit Change of Circumstances	Red	10
	Percentage of Housing Benefit overpayment due to LA error/admin delay	Red	11
	(Snapshot) Long Term Empty Properties	Green	12
	(Snapshot) Number of households in B&B/hotel-type accommodation & Hostels (LA owned or managed); and Number of successful 'Move On' into suitable independent/long-term accommodation from B&Bs/hotels/hostels	Orange	13
Customer Experience	Customer Satisfaction - Telephone	Green	14
	Customer Satisfaction - Email	Green	15
	Customer Satisfaction - Face to Face	Green	16

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Area	KPI Name	RAG	Page
Customer Experience	Customer Call Handling - Average Waiting Time	Green	17
	Complaints	Grey	18
	Percentage of FOI requests answered within 20 days	Green	20
Development Management and Land Charges	Building Control Satisfaction	Green	21
	Percentage of major planning applications determined within agreed timescales (including AEOT)	Green	22
	Percentage of minor planning applications determined within agreed timescales (including AEOT)	Green	23
	Percentage of other planning applications determined within agreed timescales (including AEOT)	Green	24
	Total Income achieved in Planning & Income from Pre-application advice	Green	25
	Percentage of Planning Appeals Allowed	Green	26
	Percentage of official land charge searches completed within 10 days	Red	27
	Number of affordable homes delivered	Green	28

Summary Index

Area	KPI Name	RAG	Page
Waste and Environment	Number of fly tips collected and percentage that result in an enforcement action		29
	Percentage of high risk food premises inspected within target timescales		30
	Percentage of high risk notifications risk assessed within 1 working day		31
	Percentage of household waste recycled		32
	Residual Household Waste per Household (kg)		33
	Missed bins per 100,000		34
Leisure	Number of visits to the leisure centres & (Snapshot) Number of gym memberships		35

A note on performance benchmarking

Benchmarking can be a useful tool for driving improvement; by comparing our performance with other similar organisations, we can start a discussion about what good performance might look like, and why there might be variations, as well as learning from other organisations about how they operate (process benchmarking).

When we embark on performance benchmarking, it is important to understand that we are often looking at one aspect of performance i.e. the level of performance achieved. It does not take into account how services are resourced or compare in terms of quality or level of service delivered, for example, how satisfied are residents and customers? Furthermore, each council is unique with its own vision, aim and priorities, and services operate within this context.

Benchmarking has been included wherever possible ranking against other Local Authorities within Oxfordshire County Council. The Councils included are Cherwell, Oxford City, South Oxfordshire and Vale of White Horse.

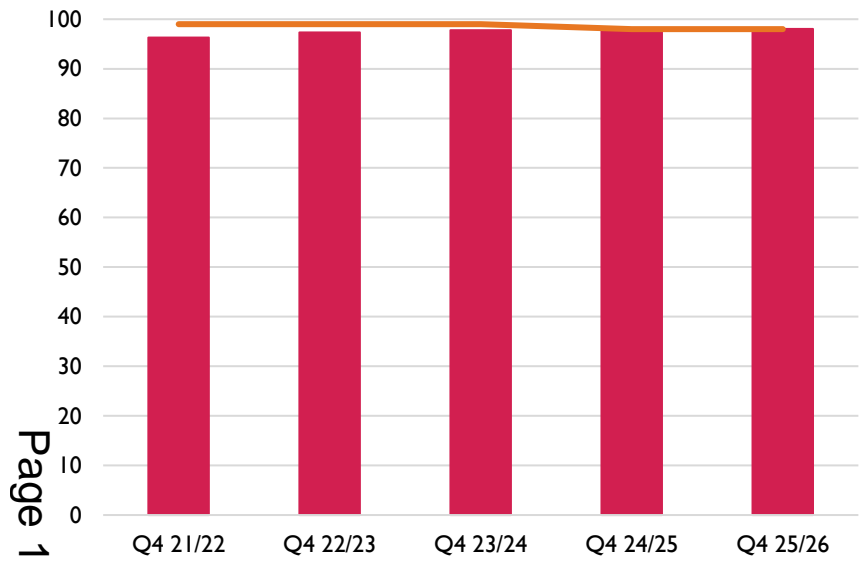
A RAG (red, amber, green) status has been applied to each KPI to provide a quick visual summary of the status of that KPI for the quarter. Additionally, RAG status has been added to the direction of travel for each metric to show how the performance against last quarter and the same quarter compared to last year is progressing.

Overall Performance

Overall, the Councils performance remained strong across many key services with good customer satisfaction, excellent planning determination times, robust business rates collection and continued growth in leisure participation. Council Tax collection remained on target alongside strong financial performance with total planning income of £1.71m against a £1.33m target. Affordable housing delivery exceeded expectations, reaching 352 homes against a target of 274. A smaller number of services experienced ongoing pressure, particularly in the processing of Housing Benefit and Council Tax Support changes, where in-quarter improvements have not yet offset the cumulative impact of earlier delays and increasing case complexity. FOI response times dipped below target and Land Charges performance was temporarily affected by staffing shortages, though early signs of recovery are evident. Recycling rates continue to reflect seasonal and national trends. Taken together, Quarter 4 demonstrates strong and consistent delivery across priority services, with targeted improvement work in place where performance remains below expectations.


Moving forward, the Council remains committed to further enhancing its performance and service delivery. A key focus is on the development and implementation of automation and self-service options, aimed at providing customers with accessible and efficient self-help tools. By enabling customers to independently address their queries and concerns, the Council anticipates a reduction in the need for repeated interactions, streamlining services and improving overall efficiency. The Council will continue to monitor the impact of these improvement programs, assessing their effectiveness in reducing customer contact and enhancing operational processes to ensure the delivery of high-quality services to the community.

Percentage of Council Tax Collected



— Target

Direction of Travel

Against last Year 
Increased since last year

Higher is Good

Target	98%
Actual	98.03%

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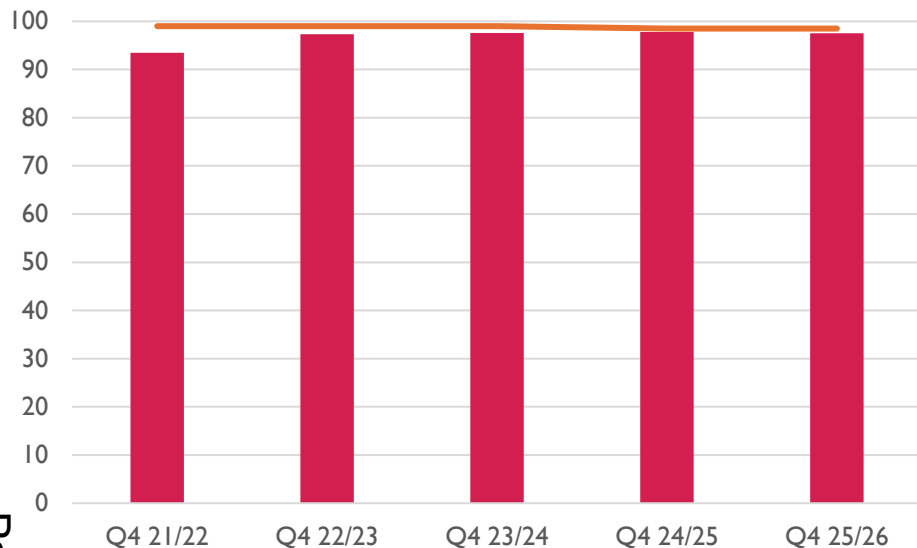
How do we compare?

Benchmarking via Gov.uk Tables and Individual Council Websites using other Local Authorities within Oxfordshire - Current Dataset is up to March '25 (2024-2025)

2024-2025 Benchmark	%	County Rank	Quartile
Cherwell	98.06	1/5	Top
West Oxfordshire	98.02	2/5	Top
South Oxfordshire	97.94	3/5	Second
Vale of White Horse	97.91	4/5	Third
Oxford	96.49	5/5	Bottom

By the end of Q4, the Council achieved its collection target. This was slightly higher than the percentage collected vs last year end. The service have indicated that they believe a refreshed Direct Debit campaign is planned to help strengthen collection in future years.

Percentage of Non-domestic rates collected



— Target

Higher is Good

Direction of Travel

Against last
Year



Slight decline since last
year

Target

98.5%

Actual

97.53%

Page 119

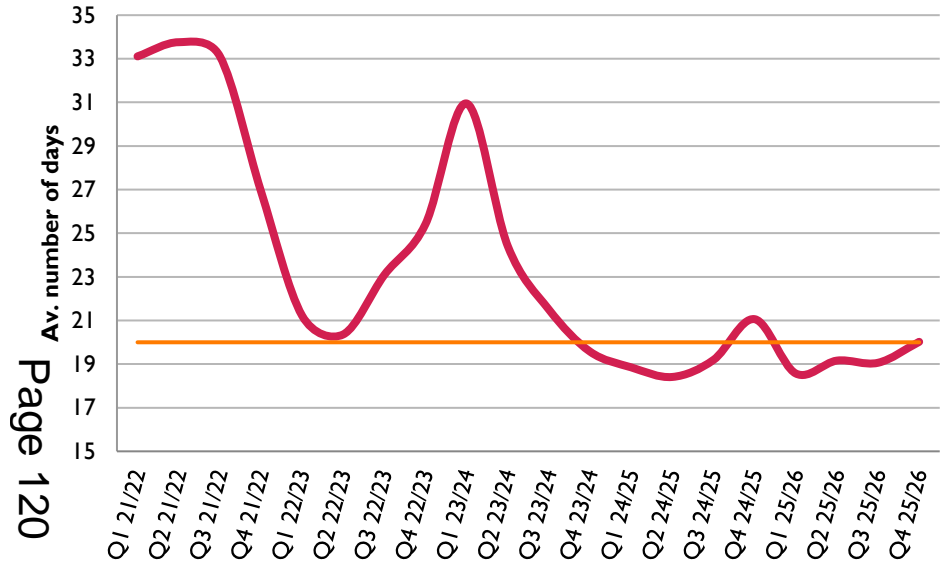
How do we compare?

Benchmarking via Gov.uk Tables and Individual Council Websites using other Local Authorities within Oxfordshire - Current Dataset is up to March '25 (2024-2025)

2024-2025 Benchmark	%	County Rank	Quartile
Cherwell	98.83	1/5	Top
West Oxfordshire	97.66	2/5	Top
Oxford	97.21	3/5	Second
Vale of White Horse	97.08	4/5	Third
South Oxfordshire	96.64	5/5	Bottom


By the end of Q4, the Council collected 97.53%, narrowly missing its 98.5% target, but kept its performance at par with last year. Up-to-date billing and account maintenance have supported year-on-year improvement in 2025/2026.


Processing times for Council Tax Support new claims



— Target

Direction of Travel

Against last Quarter 

Against last Year 

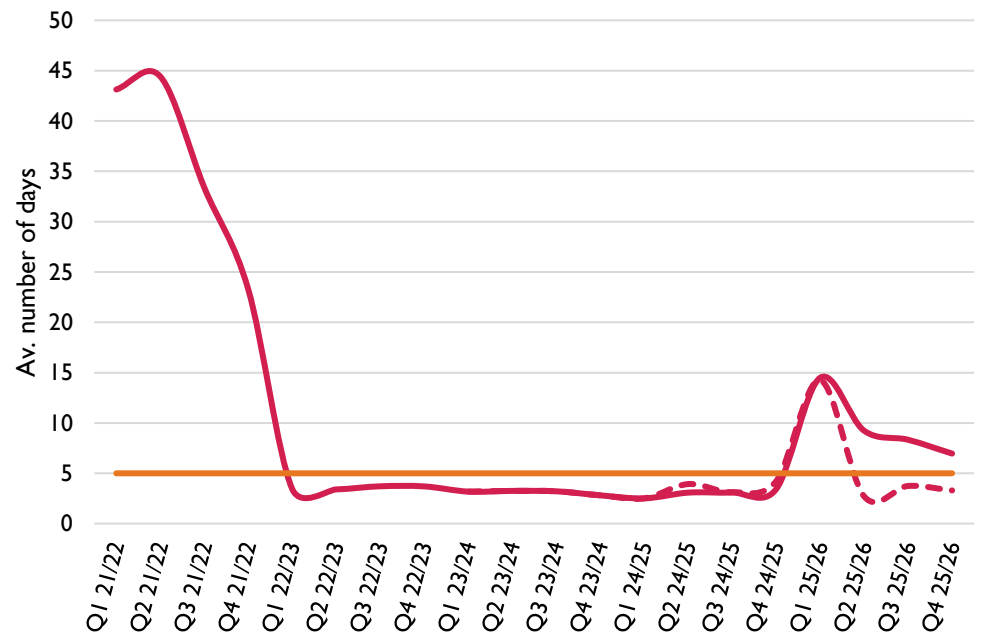
Increased since last quarter and slight decrease compared to last year

Lower is Good

Target	20
Q4 Actual	20.02

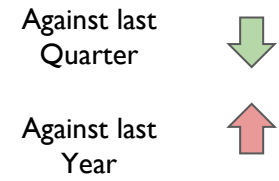
The Council achieved its Q4 target for processing times for Council Tax new claims.

Processing times for Council Tax Support Change Events



Lower is Good

Direction of Travel



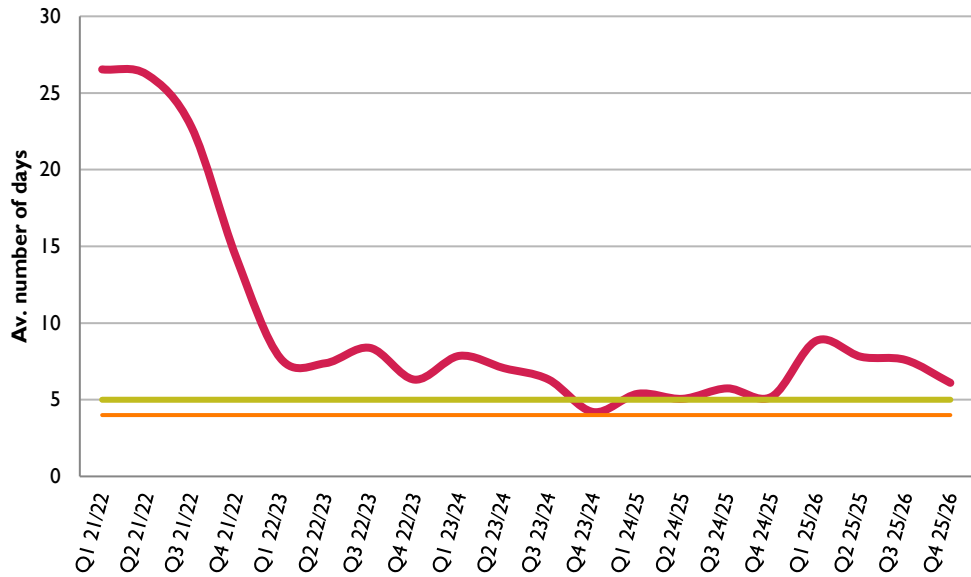
Decreased since last quarter but increased since last year

Target	5
Actual	6.96

Page 121


The cumulative processing time for Council Tax Support Change of Events remains over target, though it continued to trend downward through Q4. The in-quarter average from January to March was 3.3 days with the trend showing ongoing progress.


Processing times for Housing Benefit Change of Circumstances



— Target
— Shire Districts Mean

Direction of Travel

Against last Quarter 

Against last Year 

Decreased slightly since last quarter but increased since last year

Lower is Good

Target	4
Actual	6.10

Page 122

How do we compare?

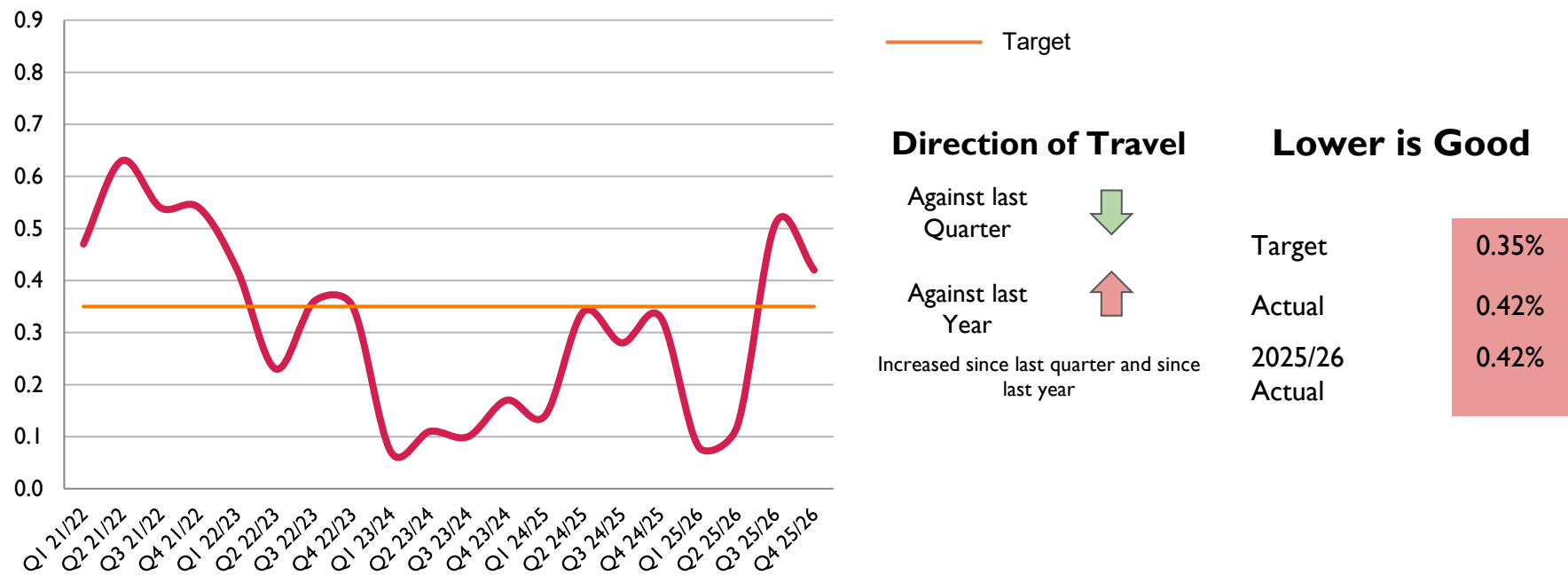
Gov.uk produces tables showing statistics on the average number of days to process a change in circumstance of an existing Housing Benefit claim. Latest Release – April – June 2025 (Q2 25-26)

Q1 25-26 Benchmark	Days	County Rank	Quartile
Cherwell	5.38	1/5	Top
South Oxfordshire	7.23	2/5	Top
Vale of White Horse	7.23	3/5	Second
West Oxfordshire	8.73	4/5	Third
Oxford	25.86	5/5	Bottom

Housing Benefit processing times remained over the cumulative target in Q4, affected by seasonal workload pressures and delays in receiving evidence for Change Events and Full Claim Reviews. Back-office process changes to better identify HB related evidence contributed to improved processing times of 4.24 specifically in Q4. UC automation is now active, going forward, this should keep UC related processing low and deliver gains in the new year.

Percentage of Housing Benefit overpayment due to LA error/admin delay

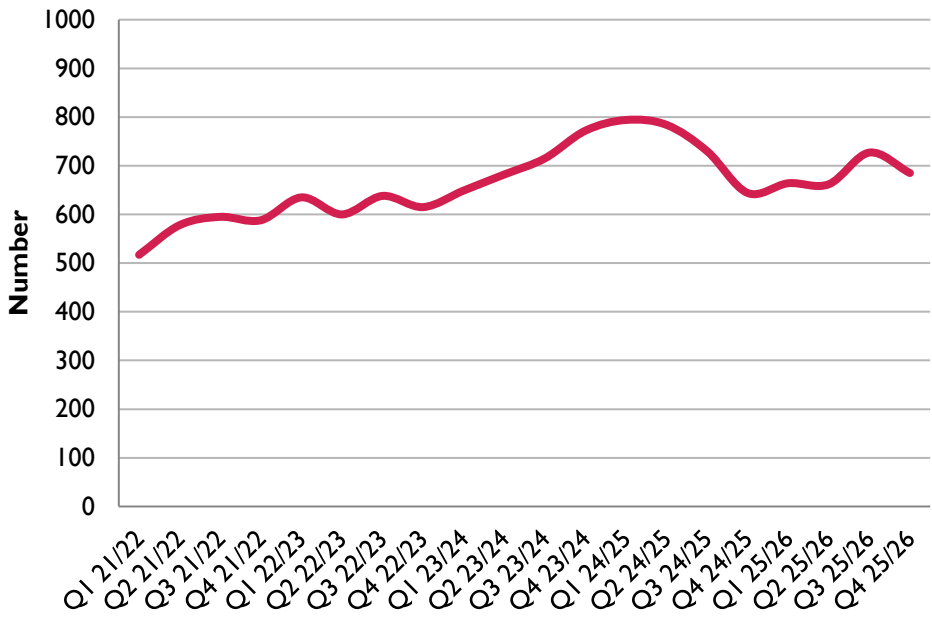
Page 123




The Council was below 0.48% national threshold target by the end of the year. Full subsidy can be claimed and no penalties would apply.


(Snapshot) Long Term Empty Properties

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Direction of Travel

Against last Quarter 

Against last Year 

Increased since last quarter and decreased since last year

Lower is Good

685

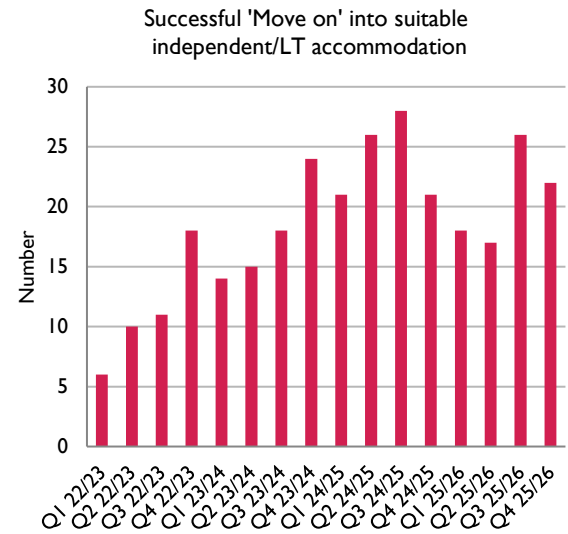
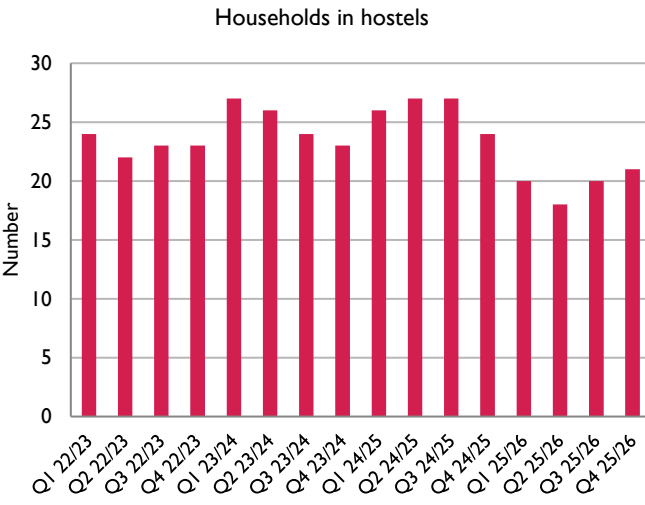
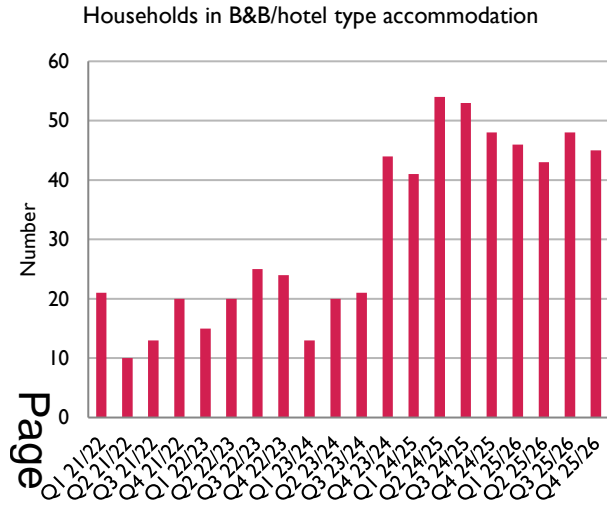
How do we compare?

Long Term Vacant Properties within districts - Benchmarking via Gov.uk

2024 Benchmark	Days	County Rank	Quartile
South Oxfordshire	430	1/5	Top
Vale of White Horse	433	2/5	Top
Cherwell	456	3/5	Second
Oxford	712	4/5	Third
West Oxfordshire	767	5/5	Bottom

The previous quarter had seen an increase in long-term empty properties, driven primarily by improved reporting processes. The Lendology empty home loan scheme was introduced in Q4.

(Snapshot) Number of households in B&B/hotel-type accommodation & Hostels (LA owned or managed); and Number of successful 'Move On' into suitable independent/long-term accommodation from B&Bs/hotels/hostels



Page 125

Direction of Travel

Against last Quarter	B&B/Hotels	↓
Against last Year	B&B/Hotels	↓
Against last Quarter	Hostels	↑
Against last Year	Hostels	↓
Against last Quarter	Move Ons	↓
Against last Year	Move Ons	↑

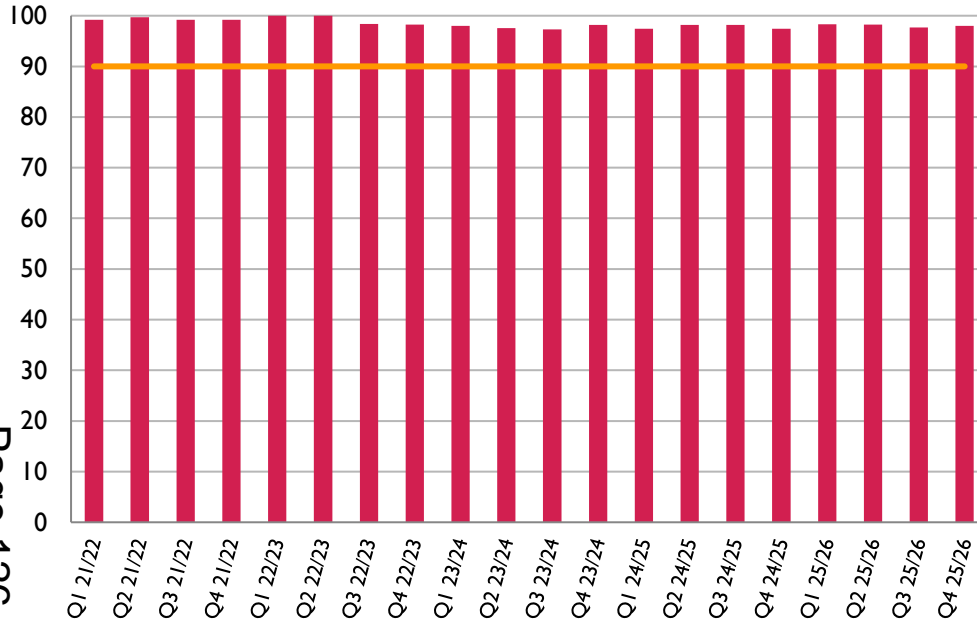
The number in temporary accommodation is gradually declining reflecting strong prevention activity and effective partnership working with local housing providers. Programmes such as the Local Authority Housing Fund (LAHF) are increasing the supply of self-contained temporary accommodation. Two hostel purchases have been completed, and work is underway with the Assets Team to bring them into use, four additional acquisitions progressing.

How do we compare?

The Institute for Government has published the Homelessness Performance Tracker, which evaluates the effectiveness of local homelessness services in England by analysing data on demand, funding, and outcomes over time. The full report is available [here](#).


Customer Satisfaction - Telephone


Page 126



— Target

Direction of Travel

Against last Quarter 

Against last Year 

Slight increase since last quarter and last year

Higher is Good

Target	90%
Q4 Actual	97.98%
2025/26 Actual	98.06%

How do we compare?

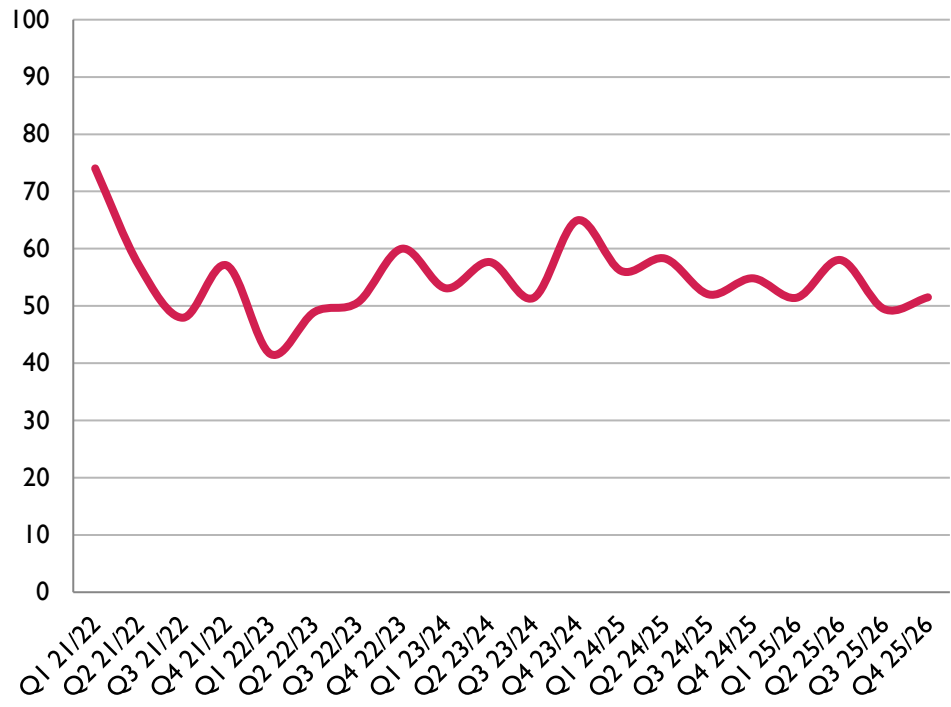
The Govmetric Channel Satisfaction Index is a monthly publication of the top performing councils across the core customer access channels. At least 100 customers need to be transferred to the survey to be included in the league table so even if satisfaction is high, it may not be included.

A total of 729 residents participated in the survey, of these, 744 customers reported being satisfied with the service, reflecting a high level of satisfaction overall.


	Oct. Rank	Oct. Net Sat.	Nov. Rank	Nov. Net Sat.	Dec. Rank	Dec. Net Sat.
West Oxfordshire	4	92%	1	100%	4	94%


Customer Satisfaction - Email

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Direction of Travel

Against last Quarter 

Against last Year 

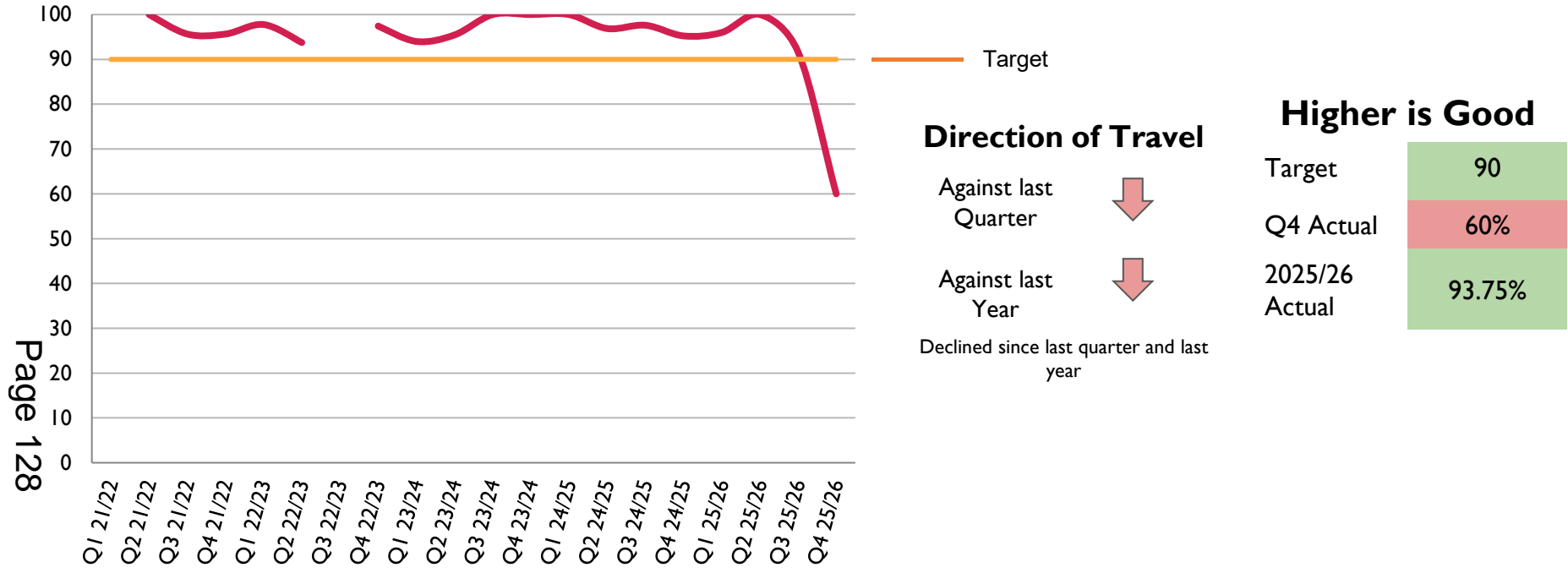
Slight increase compared to last quarter and declined since last year

2025/26 Higher is Good

Q4 Actual	51.51%
2025/26 Actual	52.65%

631 residents responded to the survey, with 325 expressing satisfaction (51.51%), up from 49.46% in Q3, with all outbound customer service emails including a survey link. The team continually monitors feedback closely and proactively seeks opportunities to enhance the overall customer experience.

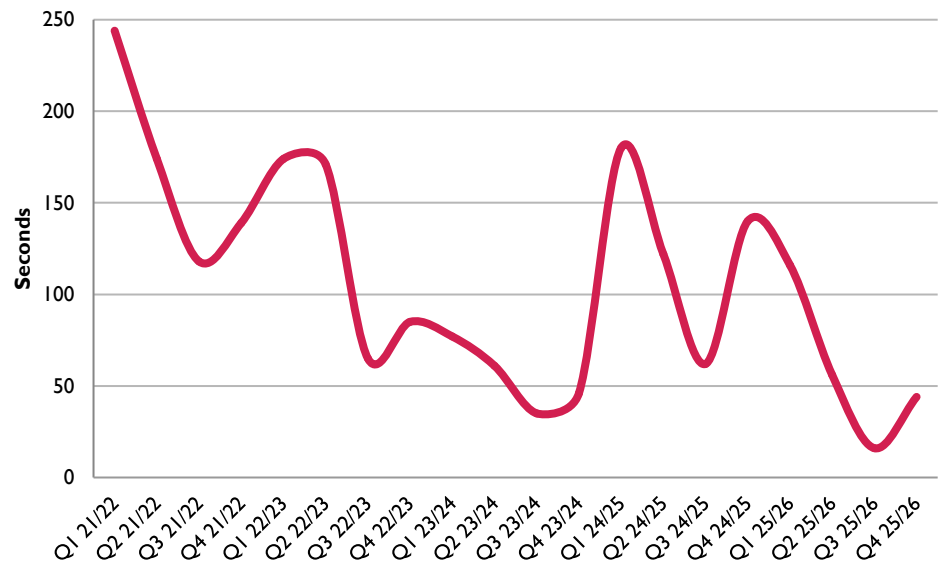
Customer Satisfaction - Face to Face




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Customer satisfaction with face-to-face interactions dipped significantly, due to only 5 completed surveys with 3 of 5 customers satisfied. Q4 figures are distorted by very low survey volumes, however, customer satisfaction has remained high across the year, with 60 of 64 customers participating in the surveys report being satisfied.

Customer Call Handling - Average Waiting Time



Direction of Travel

Against last Quarter 

Against last Year 

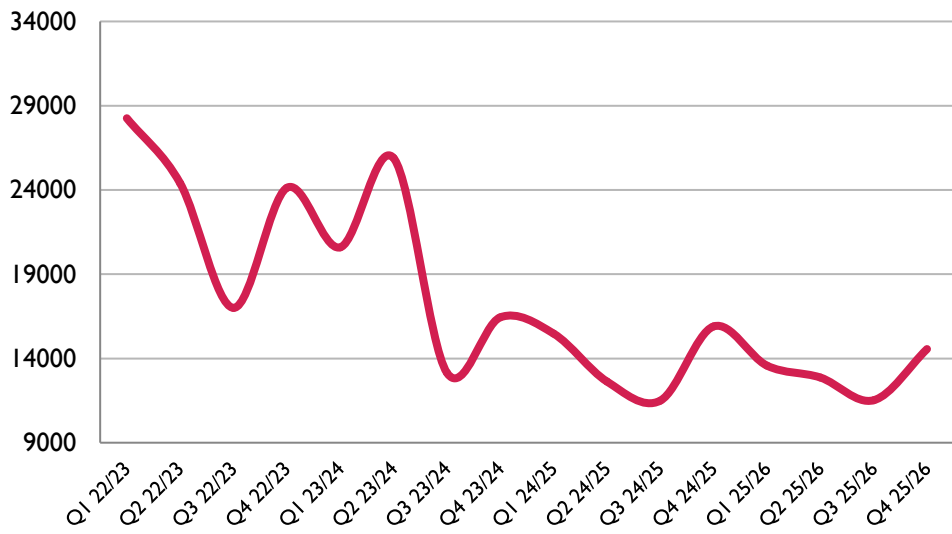
Increased since last quarter and decreased vs last year

Lower is Good

Q4 Actual	44 seconds
2025/26 Actual	57 seconds

Page 129

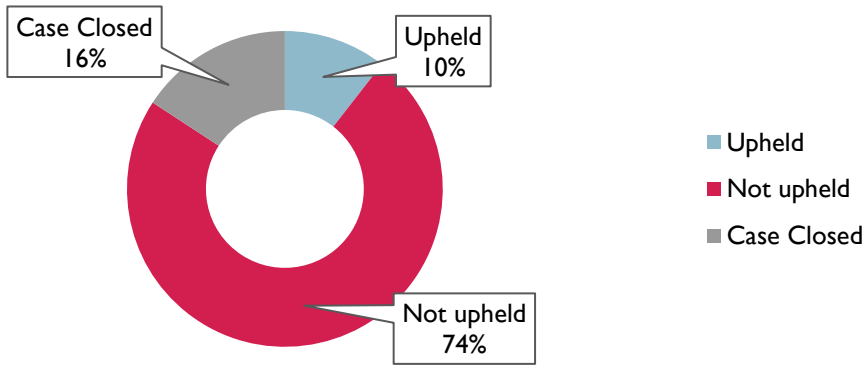
Call Volume over Time



Average call waiting times improved by around 96 seconds compared with the same period last year. West delivered a strong Q4 performance despite staff turnovers, the team maintained strong performance, supported by ongoing training and refresher sessions that helped ensure consistent service delivery.


Number of complaints upheld


Complaints by Status



Direction of Travel

Complaints upheld or partly upheld at Stage 1

Against last Quarter 

Against last Year 

Declined since last quarter but slightly increased last year

Page 130

See the table on the following page for a breakdown of those upheld and partially upheld.

A new Customer Feedback Procedure went live on the 1st April 2025.

The new process has the following stages:

- Stage 1: A review of the complaint will be undertaken by an Operational Manager within the Service Area to which the complaint relates. A response needs to provide within 10 working days from the date that we advised that the complaint was valid.
- Stage 2: Requests for Stage 2 will be acknowledged and logged within five working days of the escalation request being received. Upon receipt of a Stage 2 request, an investigation into the complaint will be undertaken by the Complaint Officer or a member of the Complaints Team. A response will be provided to the customer within 20 working days from receipt of the request to escalate the complaint to Stage 2. Stage 2 is the organisation’s final response; the complainant can then refer their complaint to the LGO.

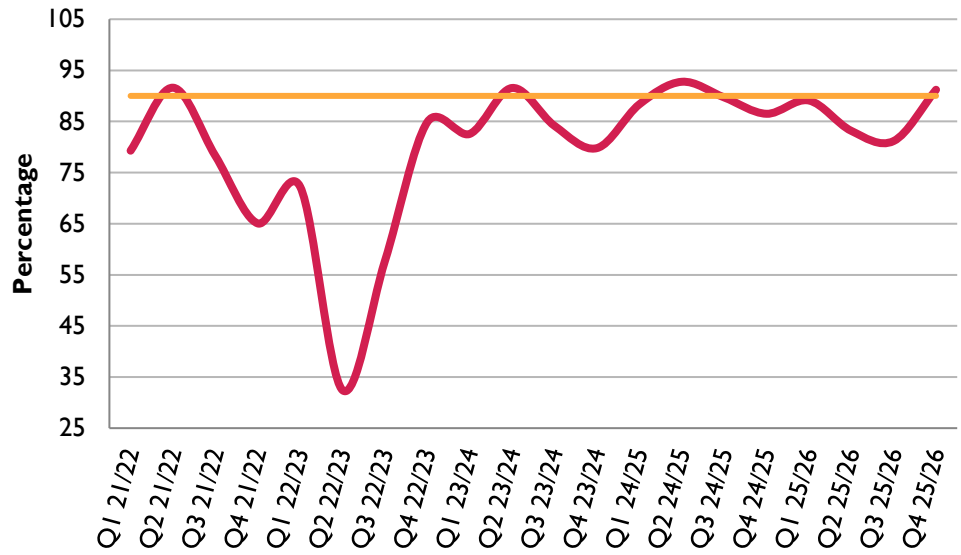
How do we compare?

There is some benchmarking available on the number of complaints received by the Ombudsman. These figures reflect cases where customers, having completed the Council’s internal complaints process, feel that the matter has not been satisfactorily resolved. However, due to the very small number of Ombudsman complaints received, the data does not provide meaningful trends or insights for this period. Figures can be found [here](#).

Complaints Upheld or Partially Upheld Breakdown


Service area	Description	Outcome/learning	Decision	Response time (days)
Revenues & Benefits	Council tax	The on-line Council Tax portal displayed conflicting information between a banner stating payments were up to date while account balance was still outstanding. An apology was given, and recovery notices threatening legal action removed from the account.	Upheld	7
Waste & Recycling	Waste Collection	Ubico confirmed that the incident stemmed from a failure within their operational processes. The specific point of failure has now been identified and corrected within their systems with additional control measures in place, to forestall recurrence.	Upheld	8


Percentage of FOI requests answered within 20 days



— Target

Direction of Travel

Against last Quarter 

Against last Year 

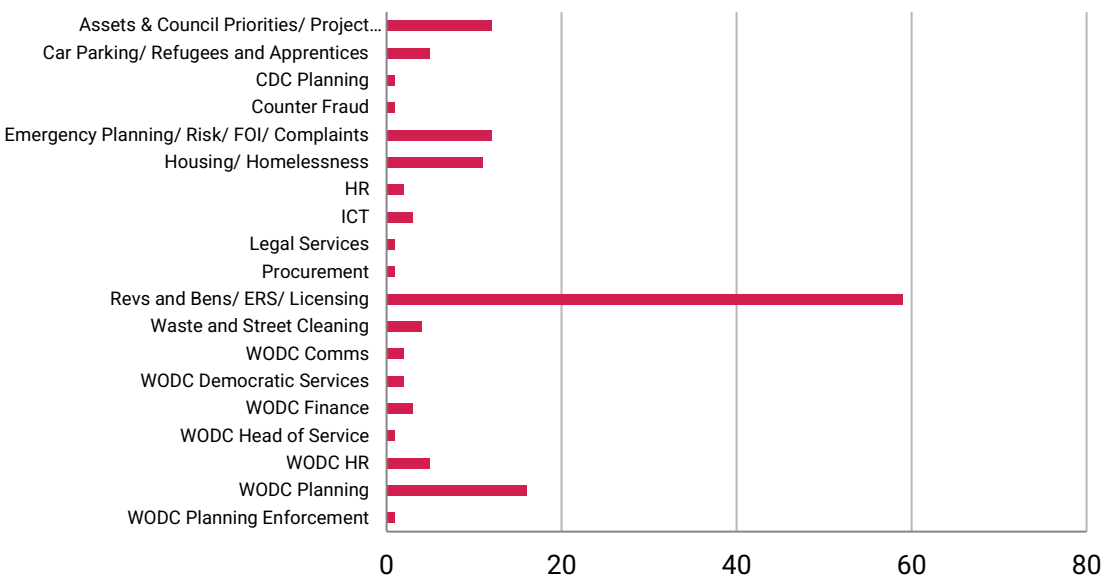
Increased since last quarter and last year

Higher is Good

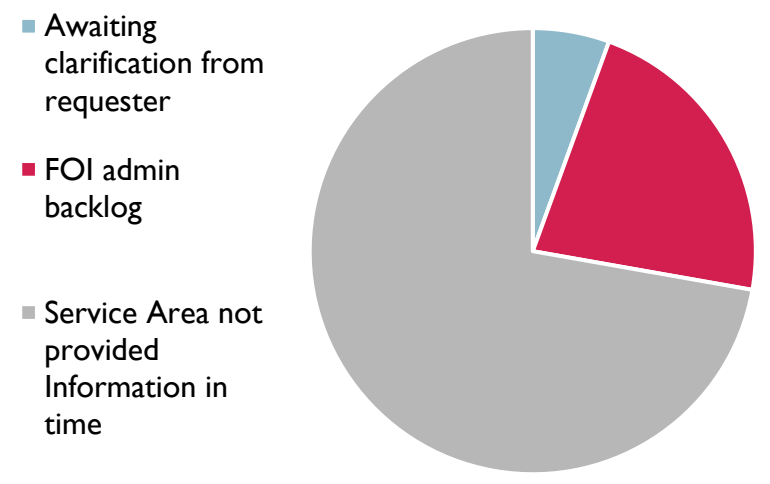
Target	90%
Actual	91.2%

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Requests by Service Area

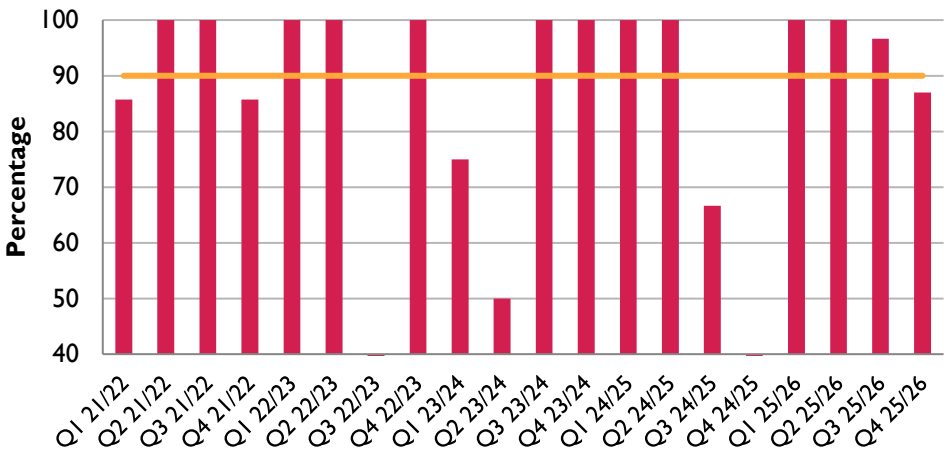


Reason FOI request was not Answered within 20 Days




All Freedom of Information requests for the quarter have been addressed.


Building Control Satisfaction



— Target

Direction of Travel

Against last Quarter 

Against last Year 

Slightly decreased since last quarter and last year

Higher is Good

Target	90%
Actual	87%

Page 133

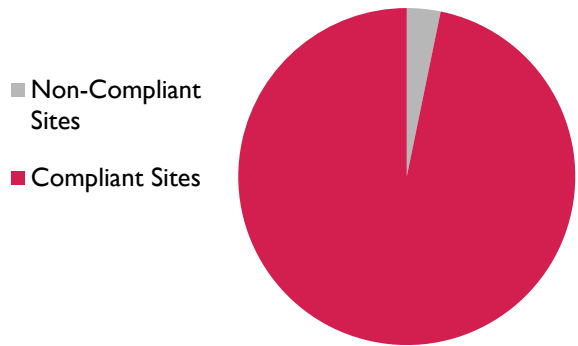
A new customer-feedback webform was introduced in October and issued with completion certificates. Early responses have been very positive, with customers praising the team’s helpful, pragmatic support and swift turnaround. Of the eight responses, only one was less than 100%, noting that the requirement for a signed Declaration of Completion wasn’t made clear at the outset.

How do we compare?

Percentage of share in the market

Jan	Feb	Mar	Number of Apps for Quarter
80%	80.37%	63.38%	175

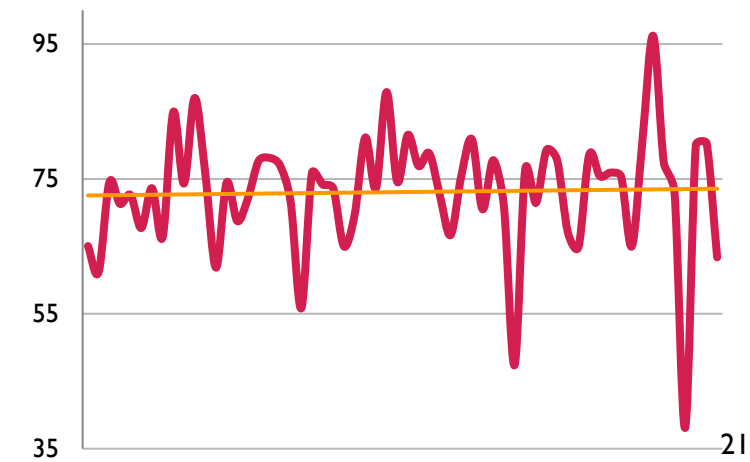
% of Sites that are Affected by Non-Compliance



Interventions by Building Control

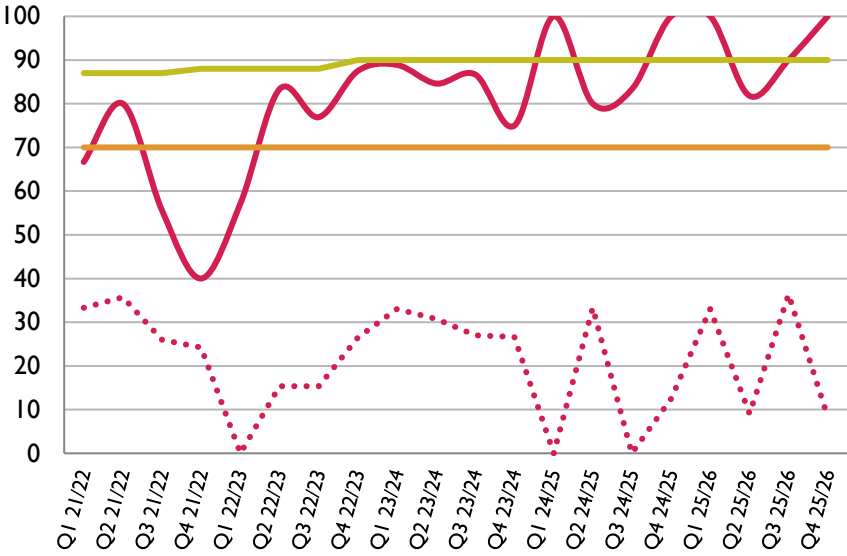
In Q4, the team carried out 836 site inspections, with non-compliances identified during 27 of them — 3.2% of all inspections. Across those 27 visits, a total of 268 non-compliances were recorded, including 67 structural issues, 67 related to fire safety, and 25 thermal issues (covering Conservation of Fuel & Power and Overheating). The Building Control service aims to guide builders and customers toward achieving compliance, but when guidance is not followed or sought, the team steps in to ensure that minimum regulatory standards are met.

The below chart shows market share over time from April 2021





Percentage of major planning applications determined within agreed timescales (including AEOT)

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Direction of Travel

Against last Quarter 

Against last Year 

Increased since last quarter and last year

Higher is Good

Target	70%
Actual	100%

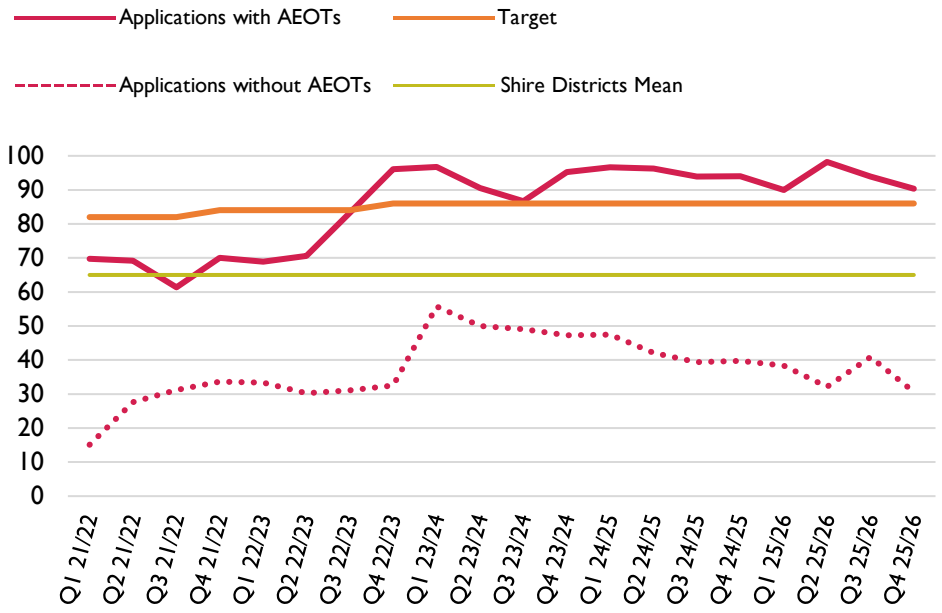
How do we compare?

Major Developments - % within 13 weeks or agreed time – LG Inform


Q3 25-26 Benchmark	%	County Rank	Quartile
Oxford	100	1/5	Top
South Oxfordshire	100	1/5	Top
Vale of White Horse	95	3/5	Second
West Oxfordshire	91	4/5	Third
Cherwell	78	5/5	Bottom


The service demonstrated consistently strong performance in Q4, with all twelve received applications processed within the agreed timescales.

Percentage of minor planning applications determined within agreed timescales (including AEOT)



Direction of Travel

Against last Quarter 

Against last Year 

Decreased since last quarter and last year

Higher is Good

Target **65%**

Actual **90.32%**

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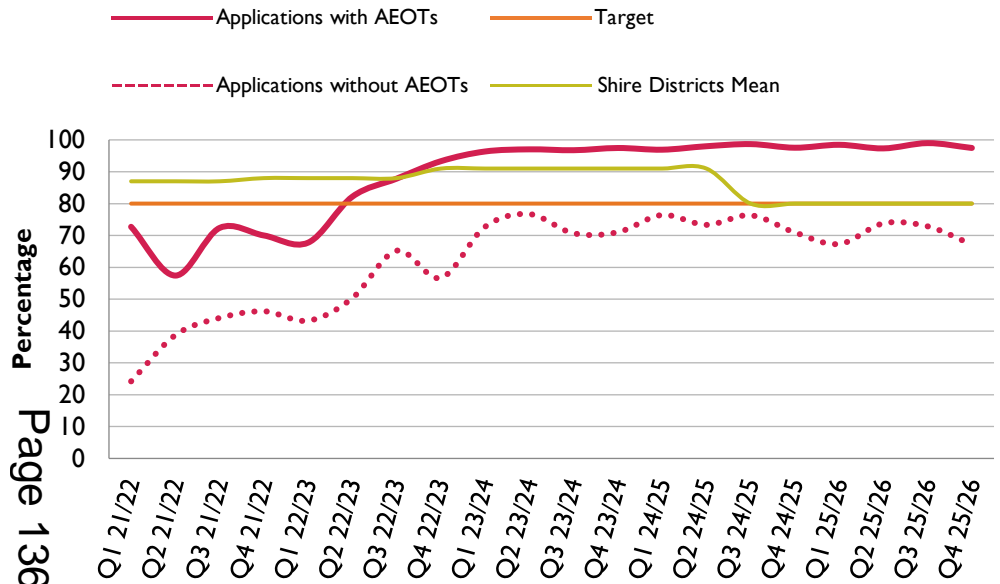
How do we compare?

Minor Developments - % within 8 weeks or agreed time – LG Inform



Q3 25-26 Benchmark	%	County Rank	Quartile
West Oxfordshire	94	1/5	Top
Oxford	93	2/5	Top
Vale of White Horse	89	3/5	Second
Cherwell	79	4/5	Third
South Oxfordshire	77	5/5	Bottom

In Q4, performance was well above target although delays persist due to the absence of a dedicated Landscape Officer. Recruitment has now been successful with 2 new joiners in the team, this is expected to improve processing timelines going forward.

Percentage of other planning applications determined within agreed timescales (including AEOT)



Direction of Travel

- Against last Quarter 
- Against last Year 
- Increase last quarter and since last year

Higher is Good

Target	80%
Actual	97.47%

How do we compare?

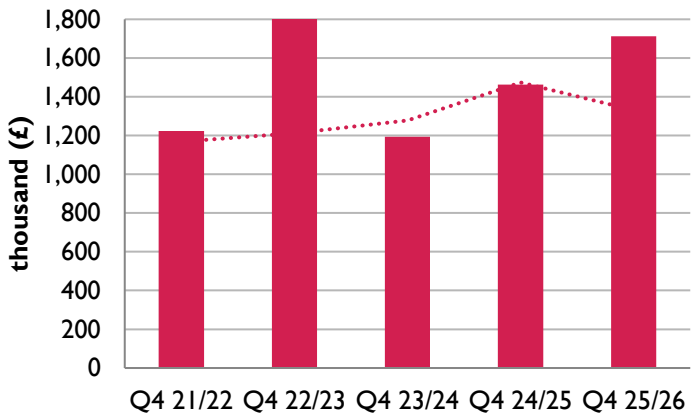
Other Developments - % within 8 weeks or agreed time – LG Inform

Q3 25-26 Benchmark	%	County Rank	Quartile
West Oxfordshire	99	1/5	Top
Vale of White Horse	97	2/5	Second
South Oxfordshire	93	3/5	Second
Oxford	89	4/5	Third
Cherwell	78	5/5	Bottom





Determination times remain high, with 198 applications processed in Q4, including 193 within agreed timescales.

Total Income achieved in Planning & Income from Pre-application advice

Total planning income



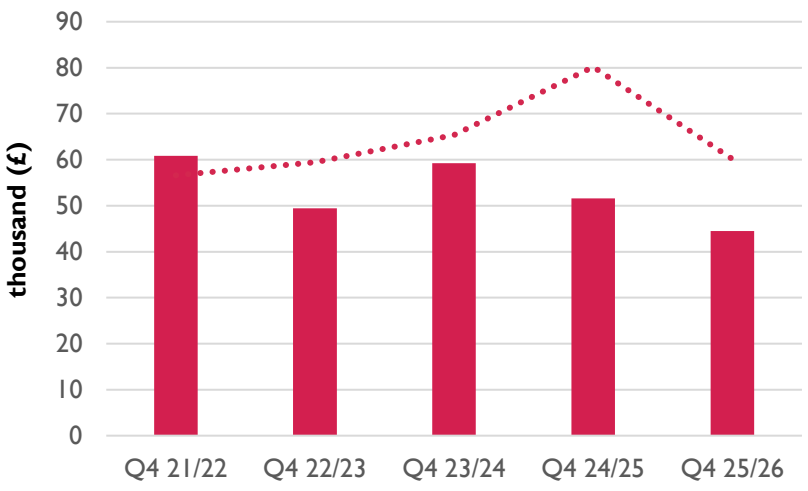
Direction of Travel

- Total Planning Income
 - Against last Quarter 
 - Against last Year 
- Pre-Application Income
 - Against last Quarter 
 - Against last Year 

Higher is Good

Total Planning Income (£)	
Target	1,330,173
Actual	1,713,275
Pre-Application Income (£)	
Target	60,173
Actual	44,495

Pre-application income

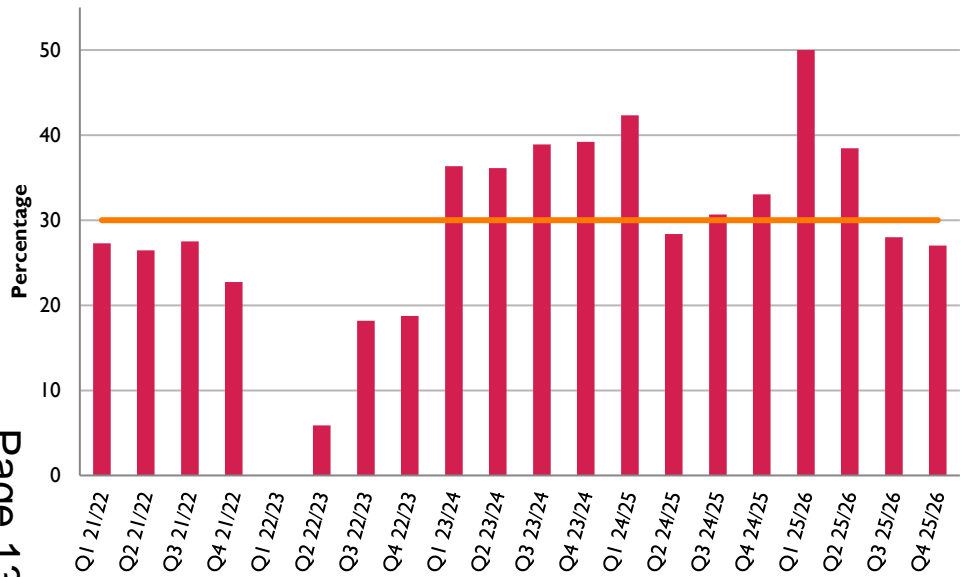


Total Income increased last quarter and increased compared to last year
Pre-App Income increased since last quarter but decreased since last year

In Q4, the council recorded high financial performance, with strong income received during the quarter contributing positively towards the annual target. However, pre-application uptake remains low, and the team is currently exploring pricing adjustments alongside a renewed focus on Planning Performance Agreements (PPAs).


Percentage of Planning Appeals Allowed (cumulative)


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— Target

Direction of Travel

Against last Quarter 

Against last Year 

Declined since last quarter and last year

Lower is Good

Target

30%

Actual

27.03%

How do we compare?

Percentage of planning appeals allowed (Specifically Q3 2025-26)

Q3 25-26 Benchmark	%	County Rank	Quartile
Vale of White Horse	0	1/5	Top
Oxford	0	2/5	Top
West Oxfordshire	17	3/5	Second
South Oxfordshire	42	4/5	Third
Cherwell	50	5/5	Bottom

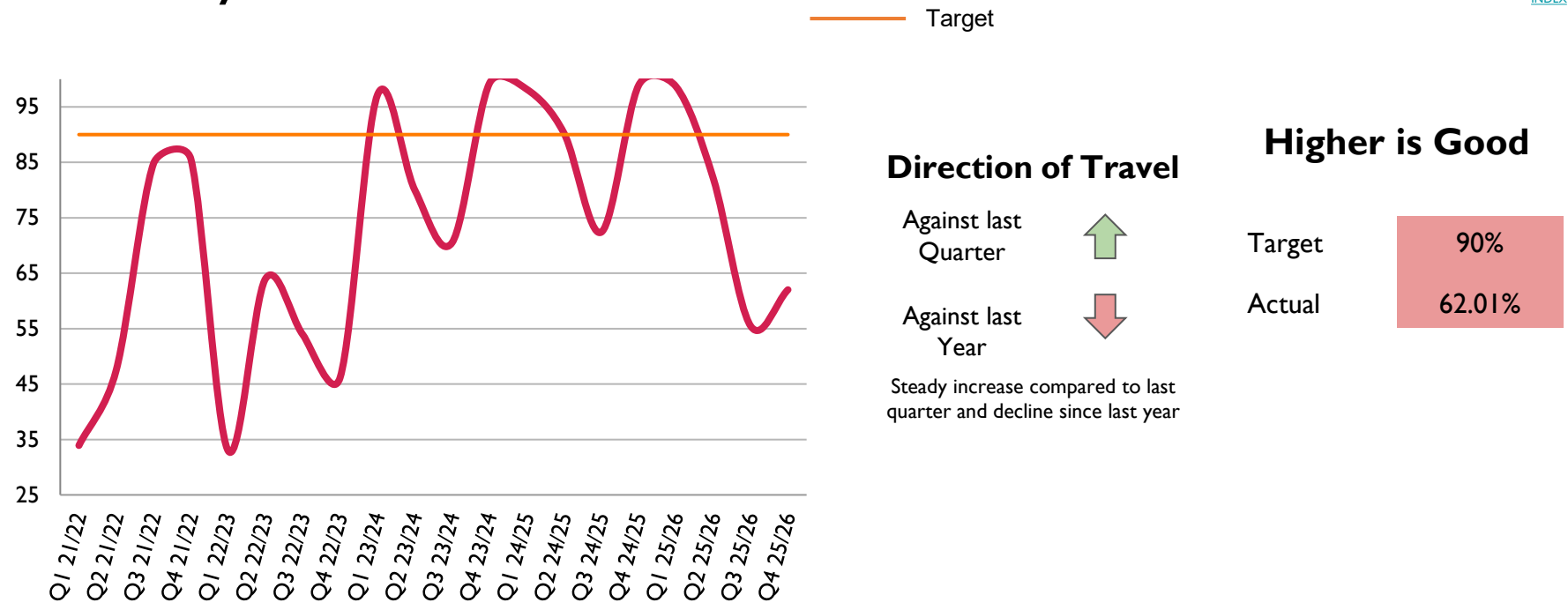
This indicator aims to ensure that no more than 30% of planning appeals are allowed in favor of the applicant, with a lower percentage being more favorable. According to the latest statistics from the Planning Inspectorate, the national average for Section 78 planning appeals granted is 28% (source: [gov.uk](https://www.gov.uk)).

The below shows the appeal split between Uplands and Lowlands applications for the year;

	Decided	Allowed	% Allowed
Uplands	17	5	29.41%
Lowlands	20	5	25.00%

Of the ten appeals allowed, none related to officer recommendations that have been overturned by planning sub-committees.

Percentage of official land charge searches completed within 10 days

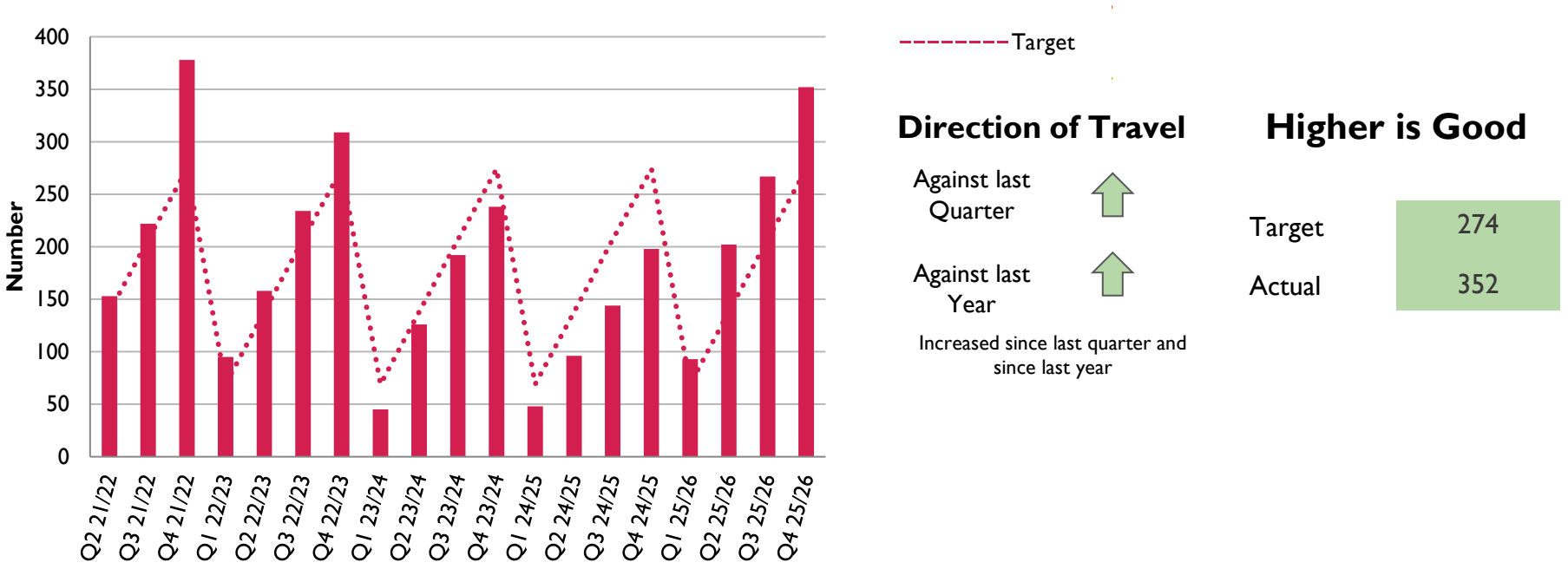


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During Q4, the Council recovered slightly in performance against the 10-day target for Land Charges searches. Staffing disruptions after the loss of a team member last September, coupled with unusually high inbox queries from tree preservation orders, fee changes, created a huge backlog. Q4 Priority was to clear backlogs and stabilise the service. Early signs show the approach is working and performance is beginning to recover.

Number of affordable homes delivered (cumulative)

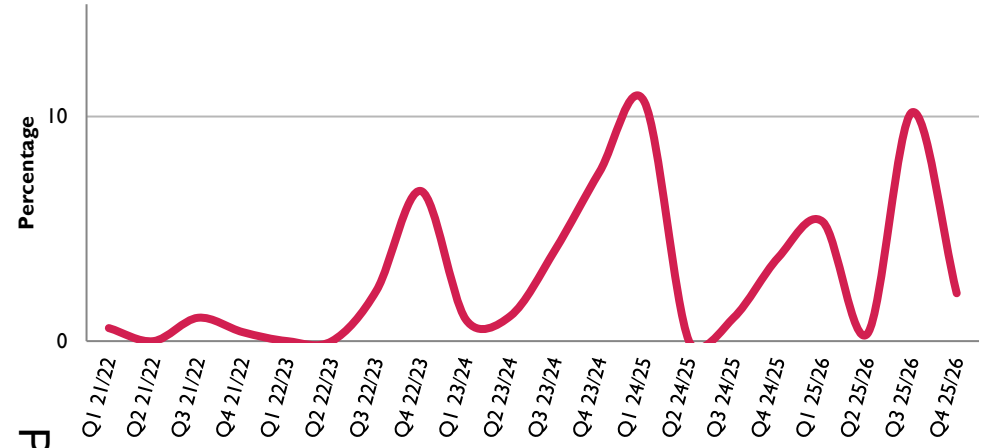
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The Council delivered strong delivery numbers in Q4 with 87 affordable homes in Q4, bringing the year-to-date total to 352, reflecting continued strong progress across the district. Affordable housing delivery in the quarter through 106 sites, RP regeneration schemes and TA acquisition by WODC. This figure includes 66 social rent dwellings delivered at Ryegrass Woodstock and Windrush Place Witney, boosting local capacity for households in urgent need.

Number of fly tips collected and percentage that result in an enforcement action

(defined as a warning letter, fixed penalty notice, simple caution or prosecution)



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How do we compare?

Number of Fly Tips reported for year 2023-24 for Local Authorities in England – Gov.uk. The latest dataset available is 2023-24.



	Total Fly Tips	Total FPNs	% FPNs per Fly Tip	County Rank	Quartile
Vale of White Horse	445	18	4.04%	1/5	Top
South Oxfordshire	873	21	2.41%	2/5	Top
Cherwell	1101	26	2.36%	3/5	Second
West Oxfordshire	1135	13	1.15%	4/5	Third
Oxford	4959	7	0.14%	5/5	Bottom

Direction of Travel

Number of Fly Tips

- Against last Quarter  Number of Fly Tips Collected: 249
- Against last Year  Percentage Enforcement Action: 2.13%

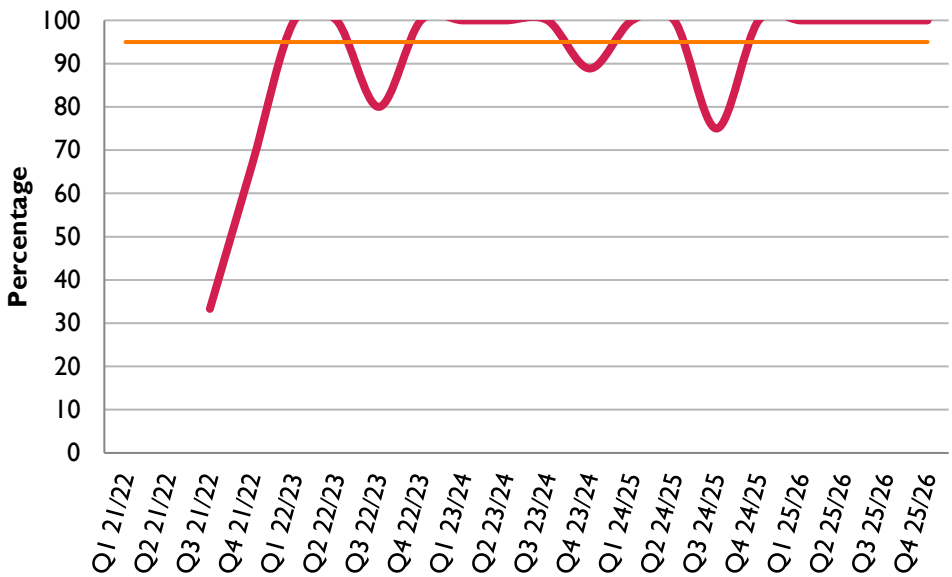
Percentage Enforcement Action

- Against last Quarter 
- Against last Year 

Fly Tips – Increased since last quarter and since last year
 Enforcement Action – Decreased since last quarter and last year


In Q4, 2 FPNS were issued, one of which was captured by CCTV. The team continued its stop-and-search as a joint effort with Thames Valley Police and HMRC to combat illegal waste carriers. Public awareness campaigns have increased, focusing on fly-tipping, Duty of Care and business waste compliance. Interviews for an additional officer will be start in May, which will further strengthen capacity and boost fly-tipping enforcement actions.


Percentage of high-risk food premises inspected within target timescales



— Target

Direction of Travel

Against last Quarter 

Against last Year 

Steady since last quarter and last year

Higher is Good

Target

95%

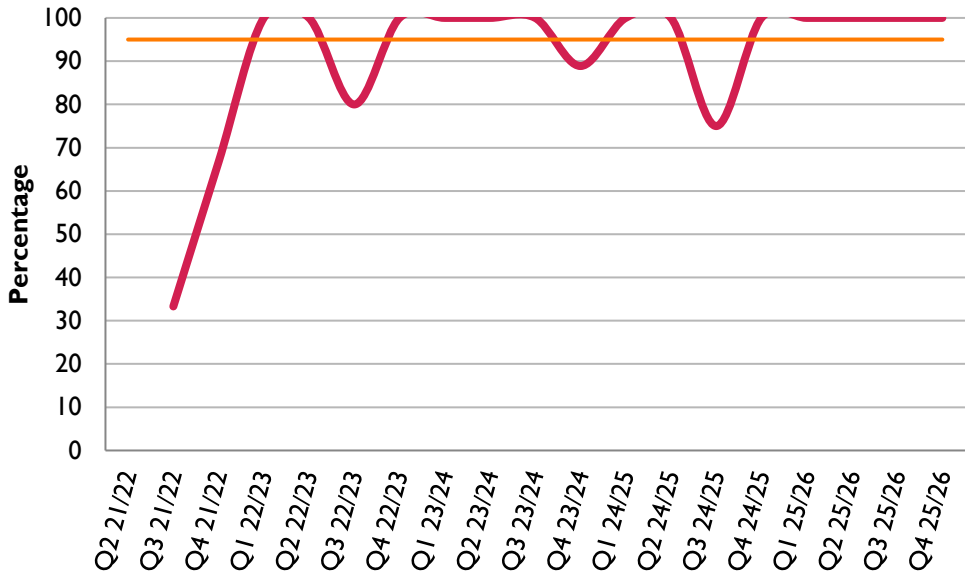
Actual

100%

Six High-Risk food inspection was undertaken during Q4, which were completed within the target timeframes.


% High-risk notifications risk assessed within 1 working day


(including food poisoning outbreaks, anti-social behaviour, contaminated private water supplies, workplace fatalities or multiple serious injuries)



— Target

Direction of Travel

Against last Quarter 

Against last Year 

Steady since last quarter and last year

Higher is Good

Target

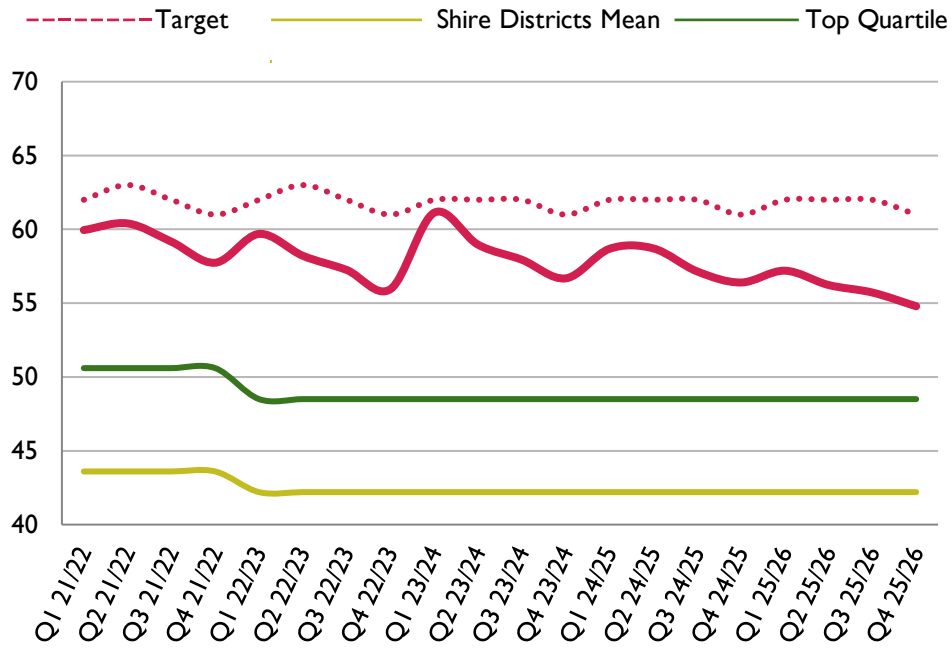
95%

Actual

100%

Four notifications were received during Q4, all four were assessed within one working day.

Percentage of household waste recycled



Direction of Travel

Against last Quarter 
 Against last Year 
 Declined since last quarter and last year

Higher is Good

Target **61%**
 Actual **54.79%**

Breakdown of Recycling

Dry Recycling 24.16%
 Garden Waste 21.09%
 Food 9.54%

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How do we compare?

Percentage of household waste sent for reuse, recycling or composting – Gov.uk. The latest dataset available is from 2024-2025.

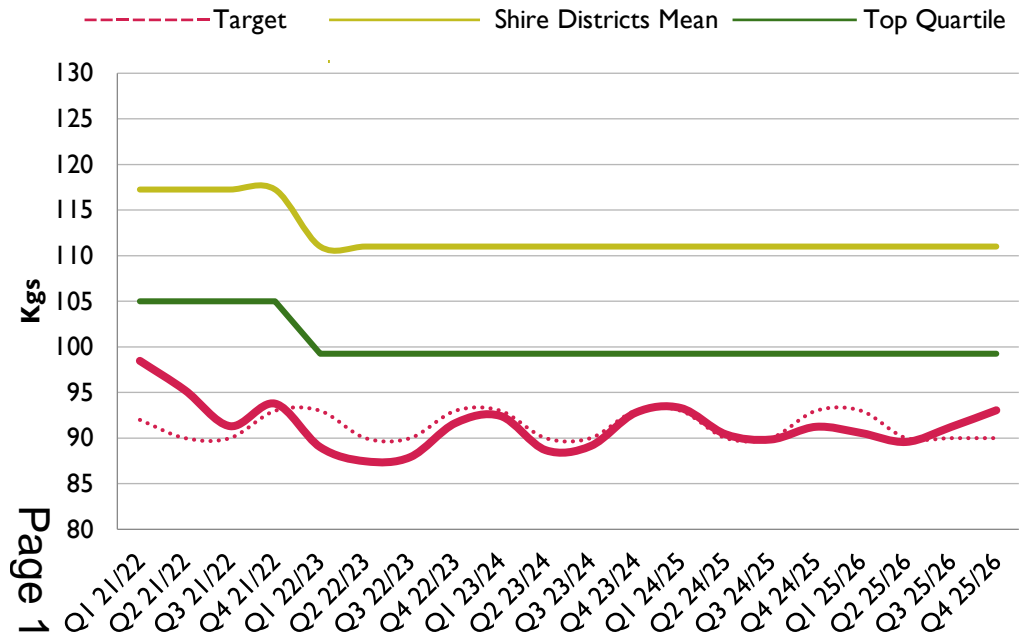
2023-24 Benchmark	%	County Rank	Quartile
South Oxfordshire	61.30%	1/5	Top
Vale of White Horse	58.9%	2/5	Top
West Oxfordshire	57%	3/5	Second
Cherwell	51.5%	4/5	Third
Oxford	48.2%	5/5	Bottom

During Q4, the household recycling rate fell by around 1.6% compared with the same period last year. The current performance sits at 54.79%, 6.2% below the Council’s target.



Nationally, recycling rates vary significantly. In 2024/25, local authorities in England recorded household recycling rates ranging from 23.7% to 63.9%, with the provisional national average at 44.3%. This wider context highlights the substantial performance gap between leading and lower-performing authorities. Within this landscape, West Oxfordshire performed strongly, ranking 14th out of 164 waste collection authorities sampled in England for 2024–2025, achieving a household recycling rate of 57%. This places it among the top councils nationally and reflects continued commitment to high recycling performance across Oxfordshire.

Despite being below target, the Council’s current rate of 54.79% remains significantly higher than the national average and consistent with the strong regional performance across Oxfordshire, where all district councils continue to perform well above national levels.

Residual Household Waste per Household (kg)



Direction of Travel

- Against last Quarter 
- Against last Year 

Increased since last quarter and last year

Lower is Good

Target	93
Actual	93.05

How do we compare?

Residual household waste per household (kg/household) – Gov.uk. The latest dataset available is from 2024-2025

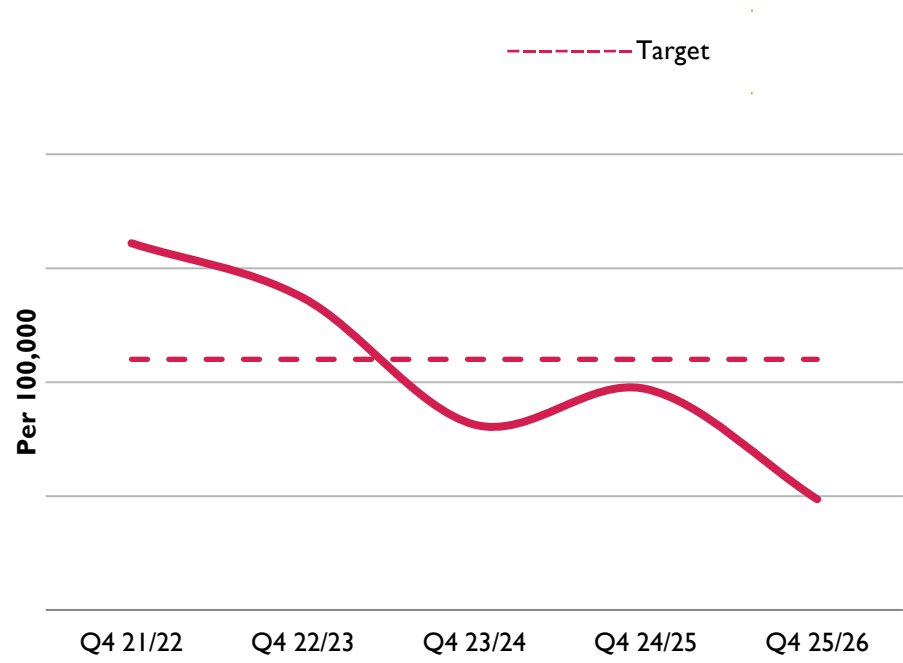
2023-24 Benchmark	Kg	County Rank	Quartile
Vale of White Horse	317.1	1/5	Top
South Oxfordshire	310.1	2/5	Top
Oxford	327.3	3/5	Second
West Oxfordshire	342.0	4/5	Third
Cherwell	399.4	5/5	Bottom

Residual household waste per household is currently 93.05kg, sitting just above the 93kg target.


Overall Q4 performance remains close to target. Nationally, West Oxfordshire performed strongly, ranking 16th out of 164 waste collection authorities published dataset available in England for 2024–2025.


Missed bins per 100,000

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Direction of Travel

Against last Quarter 

Against last Year 

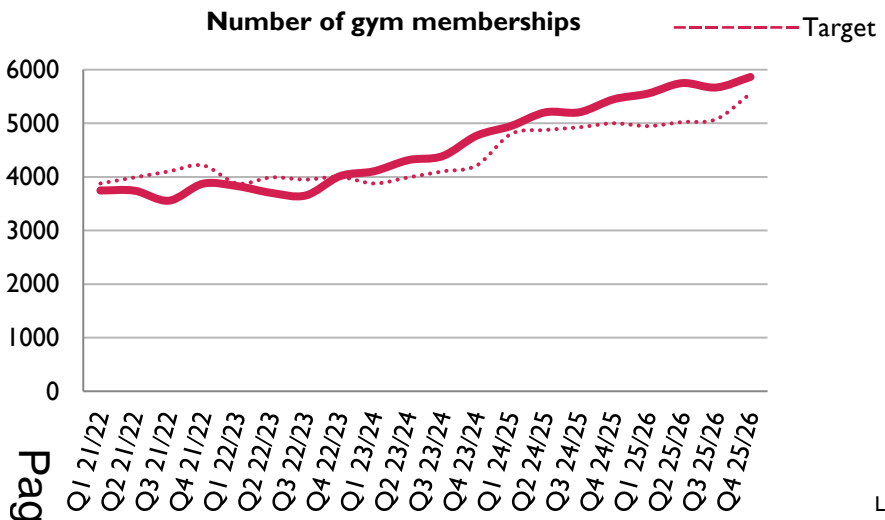
Decreased since last quarter and last year

Lower is Good

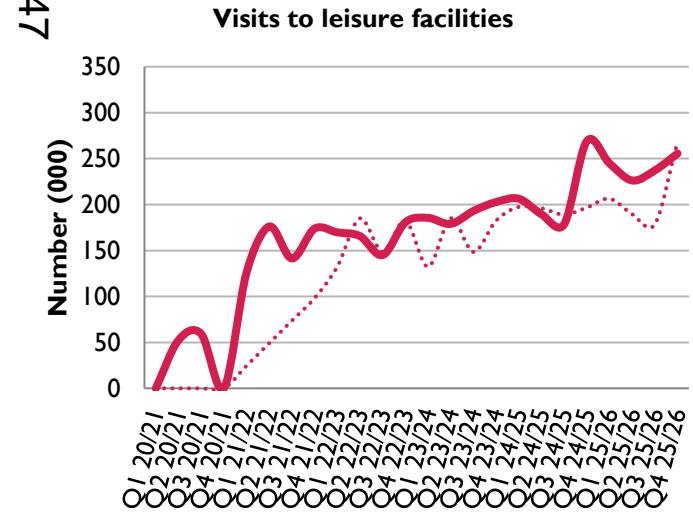
Target	110
Actual	48.58

Missed bins fell to 48.58 per 100,000, remaining comfortably within target, and overall service performance has improved following recent measures. While Q4 saw more service failures due to icy weather-related cancellations and some road closures. Ageing fleet issues remains a concern, with procurement of new vehicles still underway. Despite these pressures, communication remains excellent, misses have continued to fall, service failures are at their lowest level in years, and recovery times have improved, with 90% of failures resolved within 24 hours.

Number of visits to the leisure centres & (Snapshot) Number of gym memberships




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Direction of Travel


Gym Memberships

Against last Quarter 

Against last Year 

Leisure Visits

Against last Quarter 

Against last Year 

Gym Memberships – Increased since last quarter and last year
Leisure Visits- Increased since last quarter, slight decline compared to last year

Higher is Good

Gym Memberships

Target	5,555
Actual	5,864

Leisure Visits

Target	269,003
Actual	255,498
2025/26 Actual	963,766

The Council performed well in its leisure targets in Q4, achieving 6% above target for memberships and 5% decrease for leisure visits.


Overall Actual for 25/26 shows 14% increase compared to 2024/2025 figures demonstrating strong public engagement with its facilities.

Breakdown of Leisure Visits per facility (last updated Q3 25/25):

Facility	Q1 24-25	Q2 24-25	Q3 24-25	Q4 24-25	Q1 25-26	Q2 25-26	Q3 25-26
Bartholomew Sports Centre	9,681	9,747	5,506	16,712	20,268	17,195	23,301
Carterton Artificial Turf Pitch	6,840	6,840	6,840	9,252	2796	1810	2796
Carterton Leisure Centre	70,220	62,866	57,100	64,139	57,346	63,254	62,869
Carterton Pavilion	600	600	600	600	400	320	600
Chipping Norton Leisure Centre	22,907	21,717	18,804	54,713	47,750	40,080	52,563
Windrush Leisure Centre	76,286	65,250	73,237	103,947	95,596	81,676	69,235
Witney Artificial Turf Pitch	19,320	19,320	16,487	19,640	19,557	15,724	25,852
Woodstock Open Air Pool	516	3,126	0	0	1,137	6,143	0

Where no access controls are in place, such as at Carterton Pavilion, usage is estimated by multiplying the number of pitch bookings for the quarter by the typical number of players per booking.

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 <p>WEST OXFORDSHIRE DISTRICT COUNCIL</p>	<p>WEST OXFORDSHIRE DISTRICT COUNCIL</p>
<p>Name and date of Committee</p>	<p>EXECUTIVE – WEDNESDAY 10 JUNE 2026</p>
<p>Subject</p>	<p>FINANCIAL PERFORMANCE REPORT 2025/26 YEAR END</p>
<p>Wards affected</p>	<p>All</p>
<p>Accountable member</p>	<p>Cllr Alaric Smith, Executive Member for Finance Email: alaric.smith@westoxon.gov.uk</p>
<p>Accountable officer</p>	<p>Madhu Richards Director of Finance Email: madhu.richards@westoxon.gov.uk</p>
<p>Report author</p>	<p>Georgina Dyer, Head of Finance Email: georgina.dyer@westoxon.gov.uk</p>
<p>Summary/Purpose</p>	<p>To report the financial performance of the Council in 2025/26</p>
<p>Annexes</p>	<p>Annex A – Revenue Outturn Annex B – Capital Outturn and Capital Slippage</p>
<p>Recommendation(s)</p>	<p>That the Executive</p> <ol style="list-style-type: none"> 1. Note the 2025/26 financial performance. 2. Recommend to Council to carry forward the capital budget of £4,395,180. (Paragraph 5.2) 3. Recommend to Council to approve the transfers to and between Earmarked Reserves as detailed in the report. (Section 4) 4. Recommend to Council to approve the necessary budget virements related to Publica Phase 2. (Paragraph 2.27)
<p>Corporate priorities</p>	<p>Working Together for West Oxfordshire</p>
<p>Key Decision</p>	<p>Yes</p>
<p>Exempt</p>	<p>No</p>

Consultees/ Consultation	None
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I. EXECUTIVE SUMMARY

- I.1** In February 2025, the Council set a balanced budget with a contribution to general fund reserves of £91,280. The in-year quarterly reporting has consistently forecast a cost of service underspend driven by Trade Waste & Development Management income and a significant overachievement of interest on Treasury Management investment activities.
- I.2** At year end the underspend on cost of services is £251,433. This is driven by the strong performance of some fee generating services, the lower than anticipated one off costs of the Publica Review (£112,000 underspend) and the contract refunds returned to the Council by both Publica (£162,000) and Ubico (£200,000).
- I.3** Combined with the funding elements of the revenue account i.e. Interest on external borrowing, Minimum Revenue Provision (MRP) which is the charge that must be made to revenue to pay off the principal amount of borrowing taken out to fund the capital programme, similar to depreciation in the private sector, disposal of fixed assets and Government Grants, the final outturn position is a contribution to general fund reserves of £203,155.
- I.4** The Council's Treasury Management activity generated an additional £800,768 of investment income, benefitting from higher than expected interest rates for the full financial year in both our Money Market accounts and our Pooled funds. At the beginning of 2026 our Treasury Management advisors were predicting that interest rates would begin to fall this year, but this has not materialised due to the effect of the conflict in Iran on the global economy and the Bank of England's need to curb inflation.
- I.5** The £800,000 of additional Treasury Management income has been moved to Earmarked Reserves to help fund the cost of Local Government Re-Organisation (LGR).
- I.6** Throughout the year it has been reported that both Trade Waste and Development Management have generated significantly higher income than budgeted in 2025/26. This additional income enables the Council to fund priority projects without the need to take out external borrowing. The additional Trade Waste income has been moved to an earmarked reserve to fund the Waste and Environmental Services Programme (WESP) and the additional Development Management income has been moved to an earmarked reserves to fund the Woodford Way project to the planning application stage.
- I.7** Publica returned a net refund to the Council of £162,000 relating to Phase 2 of the Publica Review and early delivery against savings targets.
- I.8** The Capital Programme for the year was approved at £16.165m and expenditure at year end is £8.24m. The first phase of the replacement of the Waste Vehicle fleet was budgeted to be funded by external borrowing with the resulting interest costs and MRP included in the 2025/26 budget. Waste Vehicle replacement is now an integral part of the County wide WESP. This programme is a co-ordinated approach allowing for shared planning, joint procurement and the optimisation of both fleet and associated infrastructure. This approach will allow for the rationalisation of depots and transfer stations to better reflect overall County wide need.

- I.9 The remaining capital slippage relates to investment Property repairs at Unit 1-3 Carterton Industrial Estate, The works to replace the roof, are underway and are expected to be completed in Q2 2026/27.
- I.10 The reduced capital expenditure meant that the Council did not need to take out external borrowing in the year, saving £81,968 in budgeted interest costs and correspondingly, without additional assets, the MRP is £44,036 below budget.
- I.11 The budget for 2026/27 assumes a lower rate of interest returns for Treasury Management investments which should reduce the variance throughout the year. However, the budget was set before the Iran conflict started and now the global economic landscape is very different. It is unlikely that interest rates will fall as anticipated during 2026/27 as the Bank of England will need to manage inflation. Capital slippage, if agreed, will increase the Capital Programme to £13.4m with a corresponding increase in MRP of £44,000.

There are a number of budget variances identified in the report across a range of service areas, commentary for the most significant of these is set out below. A full list of variances by cost centre is listed in Annex A.

These figures are still subject to External Audit review; however, no material change is expected to the figures reported here.

WEST OXFORDSHIRE DISTRICT COUNCIL - Budget Monitoring

Revenue Budget Monitoring 2025/26 - 1st April to 31st March 2026

	Original Budget 2025/26	Current Budget	Actual Exp	Variance (under) / over spend
	£	£	£	£
Service Area				
Democratic and Committee Services	1,412,297	1,447,977	1,429,823	(18,154)
Environmental & Regulatory Services	784,557	698,731	729,758	31,028
Environmental Services	8,285,567	8,173,529	7,997,566	(175,963)
Finance, Human Resources & Procurement	1,062,851	1,183,180	1,202,137	18,957
ICT, Change & Customer Services	2,230,097	1,867,755	1,853,109	(14,646)
Land, Legal & Property	841,492	1,605,742	1,588,095	(17,647)
Leisure & Communities	555,410	595,786	301,192	(294,594)
Planning & Strategic Housing	1,383,153	1,280,375	1,162,599	(117,776)
Revenues & Housing Support	1,592,014	665,724	1,270,026	604,302
Investment Property and Retained Services	682,434	1,034,001	767,061	(266,940)
Total cost of services	18,829,872	18,552,799	18,301,366	(251,433)
Plus:				
Investment income receipts	(1,156,228)	(1,956,228)	(1,956,996)	(768)
Cost of services before financing:	17,673,644	16,596,571	16,344,370	(252,201)
General Government Grants	(5,183,440)	(5,851,154)	(5,839,905)	11,249
Retained Business Rates	(6,987,360)	(6,987,360)	(6,987,360)	(0)
Interest Payable	84,875	217,581	135,613	(81,968)
MRP	581,166	581,166	563,320	(17,846)
Revenue Contribution to Capital	540,000	540,000	569,624	29,624
Earmarked Reserves	1,444,735	3,265,122	3,481,160	216,038
Disposal of fixed assets	0	0	(16,770)	(16,770)
Capital Charges	(1,804,700)	(2,013,007)	(2,013,007)	0
Council Tax	(6,440,199)	(6,440,199)	(6,440,199)	0
Budgeted Contribution to General Fund	91,280	91,280	0	(91,280)
Contribution to General Fund	0	(0)	(203,155)	(203,155)

2. FINANCIAL REPORTING – REVENUE

Environmental and Regulatory Services

2.1 Building Control

Building Control has exceeded the income target for the year by £13,000 but is overspent by £11,851 in staff overtime and £6,963 in mileage that were not budgeted for in 2025/26, following the TUPE of staff from Publica back to the Council. This issue has been addressed in the 2026/27 budget. We have also been subject to charges of £12,000 from the Health &

Safety Executive for an audit of our Building Control function that is required under a new monitoring regime. The next audit is expected to take place in 2029/30.

2.2 Markets

As reported in the year, a commercial operator now manages the markets in Witney & Chipping Norton. The outsourcing is designed to revitalise the markets with income to the Council increasing over time. At the end of Q4 the overspend is £33,509, consistent with the reporting in the year. The 2026/27 budget has been adjusted to allow the operator time to deliver their improvement plans.

Land, Legal and Property

2.3 Marriotts

Marriotts was purchased by the Council in January 2023 for regeneration and to support a vibrant High Street in Witney and serve the whole District. This move away from commercial investments was a departure for the Council, with its portfolio of investment properties that had been built up over the last 15 years but demonstrated the Council's commitment to develop the local economy.

A commercial agent manages lettings and it has become apparent that retail lettings are not achieved at speed. Despite the general market conditions, during 2025/26 new tenants have begun trading at Marriotts, such as Vorwerk, Scarlett Brewery, Hotter Shoes and Opera Cafe, and existing tenants have renewed their leases. The current occupancy for the scheme is 96.89% with negotiations underway with a potential tenant for the single remaining vacant unit.

Overall Marriotts has made a net contribution to the Council's finances of £454,890 in 2025/26.

2.4 Legal

In May 2024, the Council signed up to a new Legal Shared Services agreement with Cotswold District Council and Forest of Dean District Council. The shared service offers advantages in terms of shared knowledge and resilience and the new SLA arrangement fairly apportions the cost of the service across the Councils based on the amount of resource each Council uses. For the 2025/26 financial year there is an underspend of £27,000, due to a vacant post. This post has now been recruited to and it is likely that in 2026/27 the service will be on budget.

Leisure & Communities

2.5 Leisure Contract

Overall, the leisure contract is underspent by £294,940 in 2025/26.

Of this underspend £83,000 relates to the budgeted amount for legal advice and procurement support for the negotiation of the new leisure contract for 2027-2033. This legal advice has been instructed in Q1 2026/27, with procurement support to follow.

Contract income is £176,000 above target for the year due to the Consumer Price Index (CPI) increase in the contract sum. This excess income has been moved to earmarked reserves to help offset the £1.39m reduction in leisure income expected from 2027/28 following the negotiation of the new contract

In addition, £229,000 of bad debt provision has been released back to the General Fund following the annual review of bad debt as part of the year end process, creating an additional underspend against the Leisure Contract.

Environmental Services

2.6 Ubico Contract

The Ubico contract is £200,000 underspent for the year against a budget of £8,604,053. The underspend has been split across the contract and has offset overspends for bins and boxes, recycling costs, repairs and maintenance at the Depots and trash screen clearance.

2.7 Grounds Maintenance

This is a charged for service to Parish and Town Councils to undertake grass cutting, litter clearance, hedge cutting and litter bin emptying. The service has grown over the last two years from an overspend of £30,000 in 2023/24 to an underspend of £39,000 in 2025/26. The service is provided via the Ubico contract but remits income directly to the Council. However, the budget does not include any allocation for the Council's costs in managing the service, therefore the real cost of providing this service is under represented.

2.8 Dog Warden

This is a statutory service and is not income generating, therefore 100% of the cost is borne by the Council for the collection and kennelling of stray dogs. At Q3 it was reported that there was an underspend of £24,000, a 58% reduction in demand compared to the same period last year. At year end, the underspend has increased to £36,000. By its nature, this service is subject to demand volatility.

2.9 Green Waste

Income from Green Waste licences is £68,000 behind target for the year but has achieved 96% of the £1.66m budget, a contribution to support Council services of £268,274. The cost

of a green waste licence in 2026/27 has been kept at £52.50, the lowest licence fee compared to our 14 closest neighbouring Councils.

2.10 Trade Waste

Trade Waste performance in 2025/26 has been very positive. The Publica Trade Waste team achieved additional income of £341,000 compared to budget in conjunction with an underspend on tipping charges paid to the County Council of £63,000.

The additional income (£341,000) has been moved to earmarked reserves to help fund the Waste & Environmental Services Programme (WESP).

2.11 Household Waste

After the proportionate application of the Ubico contract underspend, Household Waste is on budget for the year. However, in the year there was unbudgeted for expenditure of £65,000 on Alloy Licences which is being used in the Waste Vehicles to better understand and plan routes and to manage resources more flexibly.

2.12 Bulky Waste

Fees for Bulky Waste were increased in 2025/26 from £34 to £40 and have generated a very similar volume of collections as 2024/25, resulting in an underspend of £24,000.

Planning & Strategic Housing

2.13 Development Management

Throughout the year Planning Application income has been reported as being well ahead of budget due to the receipt of major applications. At the end of Q4, income is £433,000 above target, partially offset by £123,000 of expenditure on agency staff. This income is an increase of 20% on last year, an indication of the volatility of application income and the difficulty in setting an accurate budget. Of this excess income, £299,000 has been moved to earmarked reserves to fund the Woodford Way project to the Planning Application stage.

2.14 Development Management Appeals

External legal spend on Planning Appeals is £87,805 underspent. It is difficult to predict when appeals will be lodged but we have seen significant underspends in the last two financial years. The budget has therefore been reduced by £50,000 for 2026/27.

Retained Services

2.15 Publica Review

On 1st July 2025 the second phase of Publica employees were TUPE transferred back to the Council. This transfer included the Waste, Leisure, Assets and Project Management teams. The 2025/26 budget included £300,000 for any one-off costs incurred by the Council relating to this Phase 2 transfer. The actual one-off costs were significantly lower than budgeted, resulting in a £111,891 underspend.

2.16 Publica Contract

Due to Phase 2 of the Publica Review, Publica has remitted a net refund to the Council against the 2025/26 contract sum of £162,570. This figure includes a return of £189,997 relating to staffing and the corresponding reduction of £27,427 charged by the Council to Publica for the use of our buildings. This figure includes the reduction in the contract sum from 1st July 2025 relating to the staff transfer back to the Council, new posts in Homelessness and HR and a saving in Car Parking enforcement.

2.17 Investment Property

The Investment Property portfolio has had a mixed year in 2025/26, with the overall outturn being an overspend of £59,000. Town Centre Properties, Talisman and Des Roches have returned a combined underspend of £191,000, whilst Between Towns Road, Elmfield and Carterton Industrial Estate have returned a combined overspend of £250,000.

2.18 Elmfield

Elmfield is now part of the Council's Investment Property portfolio, however we retain liability for landlord works. Income is £32,000 behind budget for the year, linked to the landlord works on the building insulation that have been undertaken over the course of 2025/26 which reduced the area of rentable space.

2.19 Between Towns Road

The £50,172 overspend results from additional business rates liability and costs to secure the site in advance of it being sold. The sale completed at the end of January 2026 with the capital receipt included in the MTFS to fund the Leisure Centre Improvement Programme over the next two years.

2.20 Carterton Industrial Estate

Units 1-3 are currently vacant with roof replacement work underway which is due to be completed at the end of Q2 2026/27. The overspend for the year is £162,793, the majority of which is made up of Business Rates liability (£74,000), costs to keep the site secure

(£22,000), repairs to the roller shutters to access the building and restore the electrical connection (£30,147). A mandated Asbestos survey and professional fees for the condition surveys and specialist consultancy on the technical specification were also needed before going out to tender for the roof repairs (£30,927).

2.21 Town Centre Properties

Our Town Centre Properties are made up of 5 properties in Witney that include the Woolgate, Barclays Bank, Mill Walk and 35/37 High Street. Combined they have delivered a modest underspend of £17,462 relating to professional fees and service charges related to 2024/25 invoiced in the year.

2.22 Talisman

As reported throughout the year, the rental income for one of the units was missed out of the base budget in error, resulting in a £110,000 underspend for Talisman in addition to a £30,000 underspend on professional fees. The budget has been corrected for 2026/27.

2.23 Des Roches

The commencement of a new lease in July 2025, which due to timing was not included in the base budget, has provided the Council with an additional £37,000 of rental income.

A detailed report on our Investment Property portfolio, including current valuations, yield and 2025/26 outturn is the subject of a report from the Head of Assets which will go to Overview & Scrutiny Committee in June 2026.

2.24 Non-Distributed Costs

There are two elements to the pension contributions the Council makes for employees. Firstly, there is the amount paid monthly through payroll which is balanced by a secondary cash element paid direct to the Local Government Pension Scheme (LGPS) that keeps the payroll contribution at a steady rate and funds historic pension liability. The primary contribution rate has been 17.6% for the last six years, but the secondary cash contribution this year is higher than the budget and is £18,812 overspent at year end.

The pension scheme triennial revaluation was undertaken by the pension scheme actuaries and administrators in 2025 resulting in an increase in the primary contribution rate to 20% from the 1st April 2026 and the removal of the secondary contribution. This change is solely related to the way the pension scheme is funded and there is no impact on the amount of pension an employee will receive when they reach retirement. Pension payments are calculated on the basis of career average earnings (from April 2014), length of service and age. The contribution rate fluctuates over time in line with the performance of pension scheme assets.

Revenues & Housing Support

2.25 Housing Benefits

There are currently 73 households in temporary accommodation across the district. Over the course of the year this number has averaged at 76. Capacity in Council owned properties is for 22 single people with the remaining households in Bed & Breakfast or Hotel accommodation.

The reliance on Bed & Breakfast and Hotels to house an average of 54 clients cost the Council £924,000 in lost Housing Benefit Subsidy in 2025/26, partially offset by Housing Benefit overpayment income and a reduction in the contribution to Bad Debt to bring the outturn position to an overspend of £533,795.

For temporary accommodation not owned by the Council, we are only able to claw back around 27% of the average weekly cost we pay out. The 2025/26 Capital Programme included £3m to buy more properties to provide an additional 30 beds of accommodation to relieve the unsustainable pressure on revenue.

At full occupancy, the additional Council owned emergency accommodation would prevent the loss of an estimated £361,000 of Housing Benefit subsidy per year based on the current cost of B&Bs and Hotels used by the Council and the Local Authority Housing rates in place for 2026/27.

2.26 Acquisition of Temporary Accommodation

The Council completed the acquisition of a property in Corn Street Witney in the first week of November 2025 which will provide 5 beds, the first property completion of the programme. The renovation works have now been largely completed with only some minor snagging works to be undertaken although there is a national delay with equipment needed to install the security system.

The purchase of a second property in North Leigh was completed at the beginning of January 2026 and will provide accommodation for four families. The design work and specification has been finalised with the work currently being tendered through the procurement process.

The programme is on track to deliver 29 beds in total with the completion of the transfer of 6 vacant properties from Cottsway Housing due to take place on 22nd May.

All the properties have been surveyed and roof replacement in 3 of the properties will be required. This gives the Council the opportunity to upgrade the insulation in the properties which concurs with advice provided by the Climate Change Manager and supports climate emergency goals for WODC.

The capital expenditure against the original £3m approved is £1.335m. Part of the remainder is requested as slippage into 2026/27.

2.27 Budget Virements

As a result of the Publica Review it has been necessary to post a number of budget virements between employee costs and the Publica contract sum. This has not resulted in any change to the base budget, just a re-allocation of the approved budget between budget codes to remove the variances caused by the TUPE transfer of staff.

3. FUNDING

3.1 Retained Business Rates and Pooling

The accounting arrangements for Business Rates are complex and statute requires recognition of items charged in one financial year to be resolved in the following year i.e. the deficit arising in 2025/26 (the shortfall in collectable rates versus expected due to the Government reliefs) will be repaid to the Collection Fund in 2026/27. This deficit will be funded by the Business Rates deficit earmarked reserve set up specifically for this purpose.

As the Billing Authority the Council collects 100% of the 'payable' income but distributes 50% of the 'budgeted' income (regardless of whether the actual cash collected has reduced significantly due to Government reliefs) to Central Government and 10% to the County Council on a monthly basis.

The table below shows the calculation of the budgeted Business Rate income for the Council versus the Actual.

	Budget 2025/26	Actual 2025/26	
	£m	£m	
Total BR Income	48.376	46.851	Expected vs Collectable
WODC share	19.350	19.350	Fixed at Budget Setting/NNDR 1
Less Tariff	-14.461	-14.461	This is a Govt specified adjustment to reduce our collected rates to the baseline funding level they determine.
Deficit Payable	-0.001	-0.001	Fixed at Budget Setting
S31 Grant	4.571	4.735	Grant received to compensate for lost business rates income due to Central Gov policy.
Renewables	0.302	0.339	Income retained by WODC for renewable energy schemes
BR Income	9.761	9.962	
Less Levy	-2.774	-1.517	The budgeted figure is reduced by the Gain achieved from being a member of a Business Rates Pool.
Net Business Rates	6.987	8.445	
Deficit Payable		-0.687	Actual deficit submitted via the NNDR 3 form to be repaid in 2026/27
Movement to Reserves		-0.771	Pool Gain moved to earmarked reserves to pay the 25/26 deficit
Retained Income	6.987	6.987	

4. TRANSFERS TO EARMARKED RESERVES

At the Executive meeting on 11th March 2026, delegated authority was granted to the Portfolio holder for Finance and the Director of Finance to review Earmarked Reserves and re-align them with current Council priorities. This exercise has been done and has resulted in a reduction in the number of earmarked reserves from 54 to 45.

Of these 20 are ringfenced reserves of grant and Council funding for specific projects i.e. Afghan Resettlement, Extended Producer Responsibility, Homes for Ukraine and the Local Plan.

Other reserves are the result of a timing difference between the receipt and the expenditure of funding i.e. Biodiversity Net Gain, Botley PPA, Planning Skills Delivery.

The Council also has reserves set up to ameliorate specific risks i.e. Local Government Reorganisation (LGR), Investment Property Repairs, Ubico fuel contingency, Woodford Way and repayment of the Business Rates Deficit.

Specific reserves set up in 2025/26 are shown in the table below.

Specific Reserves	To £	Purpose
WESP	900,000	WESP Project
Maintenance of Open Spaces (Council Funded)	275,000	Ad hoc costs of repairing fences, footbridges, Play Parks, Kilkenny Country Park etc
Property Repairs & Maintenance Fund (Revenue)	150,000	Funding reactive building repairs that do not qualify as capital and are charge to the revenue budget
LGR	1,000,000	LGR costs before Vesting Day
Hardship Fund	440,000	Funding for the Council Tax and Housing Benefit Hardship schemes
Ubico Fuel Contingency	250,000	To fund the additional costs of diesel caused by the Iran war
Building Maintenance Fund	500,000	To fund the planned building maintenance of Council properties
Woodford Way Social Housing Scheme	200,000	To advance the scheme to the Planning stage
Total	3,715,000	

Reserves are reviewed at least annually with authority sought from the Executive to move funding between reserves as risks change over time.

The table below shows the proposed movements to earmarked reserves. After the proposed movements the final outturn position will be a £203,155 surplus which will go to the General Fund.

Reserve	Transfers		
	To	From	
	£	£	
Budget Deficit	1,457,845		Transfer of S31 Grant to fund the Business Rates deficits in 25/26 & 26/27
Afghan Resettlement	391,891		Afghan Resettlement Grant to be spent in 2026/27
Budget Deficit	1,687,057		Funding transferred from earmarked reserves that have been closed
Biodiversity Net Gain	27,142		Grant funding to be spent in 2026/27
Botley West PPA	36,585		Ringfenced income from the Planning Performance Agreement
Hardship Fund	440,000		Funding for discretionary hardship award scheme administered by Revenues & Benefits
Renters Rights Act New Burdens	32,354		Grant funding to be spent in 2026/27
Ubico Fuel Contingency	250,000		Set up to fund increase in diesel costs due to the Iran conflict
Building Condition Surveys		99,625	Funding for building condition surveys and the Asset Management Plan
Investment Property		451,872	Dilapidations expenditure for Newman Court & Chawley Park in 2025/26
New Initiatives		109,258	Funding for Strategic Housing Delivery Manager and an Ecologist
Project Contingency		24,500	Set up costs for Lendology scheme
Maintenance of Open Spaces		72,991	Repairs & Maintenance for playgrounds and Kilkenny Country Park
Budget Deficit		196,406	One off costs for the Publica Review phase 2
Total	4,322,874	954,652	

5. CAPITAL PROGRAMME

- 5.1** The capital programme approved by Council as part of the budget for 2025/26 totalled £16,165,000. At year end £8,242,280 had been spent against this budget.
- 5.2** Of the underspend £4,395,180 is requested to be carried forward into 2026/27 as slippage as it concerns timing differences in the Waste Fleet Replacement, the acquisition of Temporary Accommodation and the re-roofing works underway at Units 1-3 Carterton Industrial Estate and Station Lane which are due to be completed at the end of Q2 2026/27.
- 5.3** A full breakdown of the schemes for the year and expenditure as at 31st March 2026 is attached at Annex B.

6. CONCLUSIONS

- 6.1** The net cost of service outturn position for 2025/26, before movements to earmarked reserves is in line with the forecast reported throughout the year. Better than anticipated interest returns from Treasury Management investments, significant over performance of Trade Waste, Development Management and the Leisure contract and the gain from the Business Rates Pool has allowed for higher than budgeted transfers to the Budget Deficit Earmarked Reserve and the setting up of reserves to combat specific and significant risks e.g. LGR, WESP, Building Maintenance and Woodford Way.
- 6.2** The Budget Deficit reserve was set up in 2023/24 using general fund surpluses and transfers from existing reserves to mitigate the impact of the Business Rates reset which is in effect from 1st April 2026, uncertainty around Government funding and the revenue impact of the end of the Leisure Contract in 2027. With a three year funding settlement, we have more certainty around government funding, but the Business Rates reset removes the benefit for anyone to be in a Business Rates Pool and our retained Business Rates will drop to £2.4m in 2026/27 from £6.987m in 2025/26 (after movements to reserves to repay the 25/26 deficit).

7. FINANCIAL IMPLICATIONS

- 7.1** The Council set a balanced budget for 2025/26 with a contribution to General Fund of £91,280 and the final outturn position is a contribution to General Fund of £203,155.
- 7.2** The Medium-Term Financial Strategy (MTFS) identifies a revenue funding gap of £3.28m over the next three years and a gap of £10.5m over the next 5 years from the reduction in income from the Leisure Contract and an overall drop in government & Business Rates funding. The Council will therefore need to rely on the General Fund and Earmarked Reserve balances to set a balanced budget over the life of the existing MTFS.

8. LEGAL IMPLICATIONS

- 8.1** None

9. RISK ASSESSMENT

- 9.1** Not applicable

10. EQUALITIES IMPACT

10.1 None

11. CLIMATE AND ECOLOGICAL EMERGENCIES IMPLICATIONS

11.1 None

12. BACKGROUND PAPERS

None

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Q4 position		
Current Budget	Actual Exp	Variance (under) / over spend
£	£	£

Democratic Services

DRM001-Democratic Representation	375,968	392,813	16,845
DRM002-Support To Elected Bodies	528,350	532,136	3,786
ELE001-Registration of Electors	308,667	296,510	(12,157)
ELE002-District Elections	75,700	52,493	(23,207)
ELE004-Parliamentary Elections	0	0	0
ELE005-Parish Elections	0	(237)	(237)
ELE006-County Elections	42	0	(42)
ELE007-European Elections	0	0	0
ELE008-Police & Crime Commissioner Elections	0	0	0
ELE011-Referendum	4,631	4,631	0
SUP001-Administration	154,619	151,477	(3,142)

Total - Democratic Services

1,447,977	1,429,823	(18,154)
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DRM001 - the overspend relates to the webcasting licence for the committee rooms and Council Chamber that have not been budgeted for in 2025/26. This has been remedied in 2026/27.

Elections - Registration of Electors and District Elections have an underspend on postage costs and canvassing fees. The Referendum refers to a Neighbourhood Referendum funded through Neighbourhood Planning Grant.

	Q4 position		
	Current Budget	Actual Exp	Variance (under) / over spend
	£	£	£
Environmental & Regulatory Services			
BUC001-Building Control - Fee Earning Work	61,503	83,425	21,922
BUC002-Building Control - Non Fee Earning Work	3,336	4,459	1,123
EMP001-Emergency Planning	30,607	25,214	(5,393)
ESM001-Environment - Service Mgmt & Supp Serv	102,069	102,470	401
PSH002-Private Sector Housing-Condition of Dwellings	3,000	0	(3,000)
REG001-Environmental Health General	0	0	0
REG002-Licensing	22,508	(689)	(23,197)
REG009-Environmental Protection	209,357	214,814	5,457
REG011-Authorised Process	(11,890)	(7,669)	4,221
REG013-Pollution Control	130,137	131,070	933
REG016-Food Safety	144,039	141,029	(3,009)
REG021-Statutory Burials	5,000	4,645	(355)
STC011 - Abandoned Vehicles	0	(2,839)	(2,839)
TAC309-Other Trading Services - Markets	(1,375)	32,134	33,509
Total - Environmental & Regulatory Services	698,731	729,758	31,028

BUC001 - the overspend comprises £12,000 of overtime and £7,000 of mileage that is not budgeted for in 2025/26, following the TUPE of staff from Publica back to the Council. This budget has been reviewed for 2026/27 to ensure all employee costs are included.

REG002 - £14,000 of the underspend relates to higher than budgeted income for Taxi licences and Knowledge tests with the remaining underspend made up of small variances across the other licence types.

TAC309 - The markets in Witney and Chipping Norton are now managed by a commercial operator. As the new model develops and attracts more traders to the revitalised markets, income is expected to grow over time. Whilst income is £33,000 behind target for 2025/26, the move to the new operator provides a saving of £62,000 a year from 1st April 2026 on waste collection as Ubico are no longer employed to undertake this work.

	Q4 position		
	Current Budget	Actual Exp	Variance (under) / over spend
	£	£	£
Finance, Human Resources & Procurement			
SUP003-Human Resources	302,032	310,784	8,752
SUP009-Accountancy	367,707	367,883	176
SUP010-Internal Audit	232,873	239,218	6,345
SUP011-Creditors	45,216	44,913	(303)
SUP012-Debtors	62,354	59,494	(2,860)
SUP013-Payroll	60,408	61,412	1,004
SUP019-Health & Safety	34,135	34,219	84
SUP020-Training & Development	29,658	29,658	0
SUP033-Central Purchasing	38,836	39,494	658
SUP035-Insurances	9,961	9,961	(0)
Total - Finance, Human Resources & Procurement	1,183,180	1,202,137	18,957

	Q4 position		
	Current Budget	Actual Exp	Variance (under) / over spend
	£	£	£
ICT, Change & Customer Services			
SUP005-ICT	1,281,368	1,258,795	(22,573)
SUP008-Reception/Customer Services	603,561	603,527	(34)
SUP014-Cashiers	110	0	(110)
TMR001-Street Naming & Numbering	0	(543)	(543)
TMR002-Street Furniture & Equipment	(17,284)	(8,670)	8,614
Total - ICT, Change & Customer Services	1,867,755	1,853,109	(14,646)

SUP005 - The Council has received a £22,000 refund on 3rd party Forest ICT charges, putting the service into an underspend.

	Q4 position		
	Current Budget	Actual Exp	Variance (under) / over spend
	£	£	£
Land, Legal & Property			
ADB301-3 Welch Way (Town Centre Shop)	10,240	12,061	1,821
ADB302-Guildhall	12,537	12,243	(294)
ADB303-Woodgreen	370,721	375,234	4,513
ADB304-Elmfield	(103,028)	(70,969)	32,059
ADB305-Corporate Buildings	1,101,538	1,080,672	(20,866)
ADB306-Depot	133,950	139,080	5,130
FIE346-Marriotts	(451,372)	(454,889)	(3,517)
LLC001-Local Land Charges	(49,583)	(45,261)	4,322
SUP004-Legal	337,957	310,874	(27,083)
TAC303-Swain Court	290,068	286,335	(3,733)
Total - Land, Legal & Property	1,653,028	1,645,381	(7,647)

ADB304 - Elmfield is now part of the Council's Investment Property portfolio, but we retain the liability to undertake Landlord's works. The impact of these works in 2025/26 is represented by the overspend of £32,000.

ADB305 - this cost centre includes the Property & Assets team employee costs and repairs and maintenance of the Council's operational buildings. The underspend is a collection of small variances across reactive maintenance budget lines.

SUP004 - the shared legal service has been carrying a vacancy this financial year, resulting in the underspend shown.

	Q4 position		
	Current Budget	Actual Exp	Variance (under) / over spend
	£	£	£
Leisure & Communities			
CCR001-Community Safety (Crime Reduction)	355,323	357,265	1,942
CCR002-Building Safer Communities	(6,770)	(9,689)	(2,919)
CCR301 - Communities Revenue Grant	325,525	329,423	3,898
CCT001-CCTV	107,105	102,878	(4,227)
CSM001-Cultural Strategy	88,235	85,506	(2,729)
COV022-Lockdown Grants	0	1,301	1,301
COV023-COMF	46,938	46,938	(0)
CUL001-Arts Development	53,851	53,851	(0)
ECD001-Economic Development	155,127	157,034	1,907
ECD010 – SPF Community and Place	0	559	559
ECD012-Skills and People	37,968	37,968	0
REC001-Sports Development	175,881	174,424	(1,457)
REC002-Recreational Facilities Development	55,838	63,545	7,707
REC003-Play	63,299	64,757	1,458
REC301-Village Halls	14,883	15,196	313
REC302-Contract Management	(1,099,335)	(1,394,275)	(294,940)
SUP016-Finance - Performance Review	110,796	110,836	40
TOU001-Tourism Strategy and Promotion	111,122	103,676	(7,446)
Total - Leisure & Communities	595,786	301,192	(294,594)

REC302 - The budget includes £83,000 for external legal advice and procurement support related to the negotiation of the new leisure contract for 2027. This advice is being taken in the first part of 2026/27. Unbudgeted spend of £18,000 for repairs & maintenance includes £9,975 for the installation of energy saving showers at Carterton LC. There are also number of minor overspends for the appraisal of Carterton LC roof repairs and professional advice on the specification of Solar PV installed. Income is £229,000 more than budget for the year.

	Q4 position		
	Current Budget	Actual Exp	Variance (under) / over spend
	£	£	£
Environmental Services			
CCC001-Climate Change	186,862	191,261	4,399
COR301-Policy Initiatives - Shopmobility	16,340	16,340	(0)
CPK001-Car Parks - Off Street	511,396	505,447	(5,949)
ENI002-Grounds Maintenance	624,767	585,725	(39,042)
ENI303-Landscape Maintenance	48,499	51,961	3,462
FLD001-Flood Defence and Land Drainage	195,812	190,730	(5,082)
REG004-Dog Warden	72,567	36,200	(36,367)
REG019-Public Conveniences	259,138	264,958	5,820
REG023-Environmental Strategy	81,300	80,264	(1,036)
RYC001-Recycling	2,180,412	2,177,500	(2,912)
RYC002-Green Waste	(285,736)	(268,274)	17,462
RYC003-Food Waste	1,076,674	1,066,344	(10,330)
STC004-Environmental Cleansing	947,009	950,256	3,247
TRW001-Trade Waste	(290,971)	(351,991)	(61,020)
TRW002-Clinical Waste	(500)	0	500
WST001-Household Waste	2,242,557	2,246,119	3,562
WST004-Bulky Household Waste	17,856	(6,793)	(24,649)
WST301-Env. Services Depot, Downs Rd, Witney	376,108	380,618	4,510
WST005-WESP	59,030	58,947	(83)
Total - Environmental Services	8,319,120	8,175,612	(143,508)

CCC001- The Council has contributed £10,000 for the Better Housing Better Health (BHBH) project that is not included in the base budget. This overspend has been partially offset by other small underspends. The 2026/27 budget has been updated to include the BHBH contribution.

ENI002 - this service provides Grounds Maintenance and Grass Cutting to Parish and Town Councils in the District. Income for the year is £35,000 ahead of budget and the Ubico contract is £4,000 underspent. Whilst this is a good news story, there are no Council overheads charged to Grounds Maintenance to manage the service in the budget, therefore the real cost of providing this service is under represented.

REG004 - the Council has a responsibility to collect and kennel stray dogs until their owners can be found. The cost for 2025/26 is a 59% reduction compared to 2024/25. Clearly this statutory service is subject to volatility of demand.

RYC002 -the service has achieved 96% of the income target in 2025/26 equivalent to £68,000 behind target for the year. This has been offset by underspends of £19,000 on new bins and boxes, £22,000 for printing and postage of garden waste licences and £10,000 against the Ubico contract sum.

RYC003 - the underspend relates to the underspend against the Ubico contract sum

TRW001 - Trade Waste income was £341,000 ahead of target in 2025/26 and tipping charges, paid to the County Council are £63,000 underspent. The additional income of £341,000 has been moved to earmarked reserves to fund the Waste & Environmental Services Programme (WESP) over the next 3 years.

WST004 - Bulky Waste income has ended the 2025/26 financial year £24,000 above target.

Q4 position		
Current Budget	Actual Exp	Variance (under) / over spend
£	£	£

Planning & Strategic Housing

DEV001-Development Control - Applications	(632,258)	(636,931)	(4,673)
DEV002-Development Control - Appeals	215,241	127,436	(87,805)
DEV003-Development Control - Enforcement	770	0	(770)
ENA001-Housing Enabling	192,115	197,437	5,322
ENI301-Landscape Initiatives	57,505	57,565	60
HLD315-Growth Board Project (Planning)	39,258	28,016	(11,242)
PLP001-Planning Policy	1,073,333	1,076,519	3,186
PLP003-Implementation	0	0	0
PLP004-Conservation	191,091	194,212	3,121
PSM001-Planning Service Mgmt & Support Serv	143,320	118,345	(24,975)

Total - Planning & Strategic Housing

1,280,375	1,162,599	(117,776)
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DEV001 - Planning Application income is £433,000 above target for the year due mainly to major applications while Pre Application Advice income is £15,675 below target. This additional income is offset by £123,000 of agency staff, £13,000 to the County Council for the Thames Valley Environmental Records Centre and a number of small under and overspends. £299,000 of the additional income has been transferred to Earmarked Reserves to fund getting the Woodford Way housing project through to the Planning permission stage. If it transpires that this reserve is not required, the balance will be released back into the General Fund.

DEV002 - it is difficult to predict when planning appeals will be lodged or to forecast whether the full budget will be exhausted by the end of the year. The budget for 2026/27 has been reduced by £50,000.

HLD315 - this cost centre is concerned with expenditure related to the advancement of the Salt Cross programme. The underspend is in professional fees.

PSM001 - there is an underspend of £11,000 on printing and £13,000 on professional fees.

	Q4 position		
	Current Budget	Actual Exp	Variance (under) / over spend
	£	£	£
Retained Services			
COR002-Chief Executive	510,282	523,697	13,415
COR003-Corporate Policy Making	74,844	76,894	2,050
COR004-Public Relations	436,821	438,647	1,826
COR005-Corporate Finance	727,812	718,869	(8,943)
COR006-Treasury Management	26,700	20,333	(6,367)
COR007-External Audit Fees	208,312	200,123	(8,189)
COR008-Bank Charges	78,500	59,207	(19,293)
COR012 - Publica Review	309,232	197,341	(111,891)
COR013-LGR	196,406	196,406	0
COR302-Publica Group	193,667	31,097	(162,570)
FIE341-Town Centre Properties	(407,998)	(425,460)	(17,462)
FIE342-Miscellaneous Properties	(135,512)	(85,340)	50,172
FIE343-Talisman	(1,223,324)	(1,357,343)	(134,019)
FIE344-Des Roches Square	(431,490)	(470,518)	(39,028)
FIE345-Gables at Elmfield	0	5,415	5,415
NDC001-Non Distributed Costs	816,000	834,812	18,812
TAC304-Witney Industrial Estate	(169,660)	(170,443)	(783)
TAC305-Carterton Industrial Estate	(176,425)	(13,632)	162,793
TAC306-Greystones Industrial Estate	(9,667)	(10,383)	(716)
TAC308-Other Trading Services - Fairs	9,501	(2,662)	(12,163)
Total - Retained Services	1,034,001	767,061	(266,940)

COR002 - The majority of the overspend relates to the £11,000 contribution to the Cotswold Conservation Board which was unbudgeted for in 2025/26. This has been adjusted for 2026/27.

COR008 - costs related to the processing of debit & credit card payments to the Council are lower than anticipated, combined with a £5,000 underspend on bank charges

COR012 - this cost centre represents the budgeted one off costs for the second phase of the Publica Review where staff were TUPE transferred back to the Council on 1st July 2025.

COR302 - This cost centre represents the underspend on the Publica contract that has been returned to the Council for 2025/26.

FIE341 - income is on budget for the year with underspends of £4,000 on premises costs and £12,000 on professional fees.

FIE342 - rental income is on budget but there has been £50,000 of unbudgeted expenditure relating to Between Towns Road before it was sold i.e. Business Rates and costs to secure the site.

FIE343 - Rental income for Unit 13 has been incorrectly excluded from the base budget for 2025/26, this error has been corrected for the 2026/27 budget but has caused a £110,000 underspend in the current financial year in addition to an underspend on professional fees.

FIE344 - rental income achieved in 2025/26 is £37,000 above target due to the commencement of a new lease in July 2025.

NDC001 - there is an overspend of £18,000 for the Council's secondary pension contribution. For the triennial valuation period beginning 1st April 2026 the Council will cease to make secondary pension contributions and will increase the primary contribution rate from 17.6% to 20%. This represents a change to the funding of the pension scheme, not a change to the pension benefits payable to retirees.

TAC305 - the overspend relates to business rates (£74,000) and expenditure to secure the vacant units 1 - 3 in advance of the construction of the new roof, including repairs to the rolling shutters, electricity supply works, surveys and inspections.

	Q4 position		
	Current Budget	Actual Exp	Variance (under) / over spend
	£	£	£
Revenues & Housing Support			
HBP001-Rent Allowances	626,141	1,159,936	533,795
HOM001-Homelessness	139,988	136,659	(3,329)
HOM004-Refugees	0	0	0
HOM005-Homelessness Hostel Accommodation	8,408	13,993	5,585
HOM006 - The Old Court	37,447	40,823	3,376
HOM007-Afghan Resettlement Programme	(391,891)	(391,891)	0
HOM008-Homes for Ukraine	18,190	18,190	(0)
HOM010-North Leigh Hostel	0	1,503	1,503
HOM011-108 Corn Street	0	1,789	1,789
LTC001-Council Tax Collection	277,917	275,930	(1,987)
LTC011-NNDR Collection	(46,755)	(41,387)	5,368
PSH001-Private Sector Housing Grants	51,566	51,986	420
PSH004-Home Improvement Service	(55,287)	2,609	57,896
Total - Revenues & Housing Support	665,724	1,270,026	604,302

HBP001 - The number of households in temporary emergency accommodation has remained high during 2025/26, resulting in a loss of Housing Benefit Subsidy of £924,000. This is partially offset by Housing Benefit overpayment income and a reduction in bad debt provision.

PSH004 - The Home Improvement Service carries out, through external contractors, minor adaptations to people's homes i.e. installing hand rails, ramps and key safes. The cost of external contractors is £60,000 over budget, due to inflationary increases and the volume of work increasing from 121 jobs in 2024/25 to 275 in 2025/26. The budget has been increased for 2026/27.

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ANNEX B

Capital Programme 2025/26

Scheme	Funded By	2025/26 Total Budget	Q4 Actual	Slippage	2026/27 Budget	2026/27 Budget With Slippage
Asset Repairs - Carterton Ind Est/Station Lane	Borrowing	1,500,000	17,600	1,482,400		1,482,400
Investment Property Repairs	Earmarked Reserve/Borrowing				1,000,000	1,000,000
SOHA Housing Project	Grant		1,465,500			
Ubico Fleet Replacement Programme	Borrowing	4,721,266		1,598,734	3,401,266	5,000,000
Replacement Sweepers	Borrowing	850,000		850,000		850,000
In Cab Technology	Borrowing	100,000				
Public Conveniences Refurbishmnet	Borrowing				532,000	532,000
Witney ATP Refurbishment	Revenue Contribution	200,000				
Purchase of Temporary Accommodation	Capital Receipts	3,000,000	1,335,954	464,046	1,200,000	1,664,046
CCTV - Upgrading	Capital Receipts	255,635	247,180			
Leisure Centre Improvement Programme	Capital Receipts				1,501,550	1,501,550
Improvement Grants (DFG)	Grant	880,000	1,054,780		880,000	880,000
UK Rural Prosperity Fund	Grant		204,527			
Witney Leisure Centre PSDS	Grant/Borrowing	1,584,841	1,383,087			
Carterton Leisure Centre Solar PV Installation	Grant		321,000			
Chipping Norton Leisure Centre PSDS	Grant/Borrowing	2,643,926				
IT Provision - Systems & Strategy	Revenue Contribution	100,000	55,356		100,000	100,000
Council Buildings Maintenance Programme	Revenue Contribution	250,000	469,741		300,000	300,000
IT Equipment - PCs, Copiers etc	Revenue Contribution	40,000	28,926		40,000	40,000
Shopmobility	Revenue Contribution				10,000	10,000
Guildenford Car Park Lighting	Revenue Contribution				100,000	100,000
Chipping Norton Creative	S106		21,805			
Windrust Place Public Art	S106		3,626			
Carterton Connects Creative (Swinbrook s106)	S106	39,500	984			
Developer Capital Contributions	S106		1,632,213			
		16,165,168	8,242,281	4,395,180	9,064,816	13,459,996

ANNEX B

- a. The re-roofing works at Unit 1-3 Carterton Industrial Estate is currently underway with an expected completion at the end of Q2.
- b. A full waste vehicle strategy will be coming forward from the Waste Transformation Programme for Member consideration. This strategy will look to maximise the efficiencies attainable through partnership working across the County, that the Council could never achieve through unilateral action. With the LGR decision coming in July 2026 this partnership is particularly important.
- c. A paper will be coming forward for Member consideration on the replacement of the street sweepers in early 2026/27.
- d. The Council has completed the acquisition of two properties in 2025/26 - in Corn Street Witney, providing 5 bedrooms for single households and accommodation for four families in North Leigh. The refurbishment of the Corn Street property is mostly complete with only snagging to be resolved. The completion of the transfer of 6 vacant properties suitable for temporary emergency accommodation from Cottsway Housing is expected to be completed on 22nd May. These properties will require refurbishment but all have been surveyed and specification work is underway.
- e. The decarbonisation works at Witney Leisure Centre were completed in March 2026, funded through a combination of grant and Council contribution. We are waiting for SSEN to make live the permanent electrical supply which has a current estimated date of late June/early July.
- f. The Leisure Team were successful in bidding for Sports England grant funding to install additional Solar PV on the roof at Carterton Leisure Centre at no cost to the Council.
- g. Developer Capital Contributions are the amount of £106 monies paid out to Town/Parishes during the year.

 <p>WEST OXFORDSHIRE DISTRICT COUNCIL</p>	<p>WEST OXFORDSHIRE DISTRICT COUNCIL</p>
<p>Name and date of Committee</p>	<p>EXECUTIVE – 10 JUNE 2026</p>
<p>Subject</p>	<p>DISCRETIONARY RATE RELIEF POLICY</p>
<p>Wards affected</p>	<p>ALL</p>
<p>Accountable member</p>	<p>Councillor Alaric Smith – Executive Member for Finance Email: alaric.smith@westoxon.gov.uk</p>
<p>Accountable officer</p>	<p>Mandy Fathers - Business Manager for Environmental, Welfare and Revenues Email: mandy.fathers@publicagroup.uk</p>
<p>Report Author</p>	<p>Mandy Fathers – Business Manager for Environmental, Welfare and Revenues Email: mandy.fathers@publicagroup.uk</p>
<p>Summary</p>	<p>To consider and approve amendments to the Discretionary Rate Relief Policy</p>
<p>Annexes</p>	<p>Annex A – Discretionary Rate Relief Policy</p>
<p>Recommendations</p>	<p>That the Executive resolves to:</p> <ol style="list-style-type: none"> 1. Approve the amendments to the Discretionary Rate Relief Policy ('the Policy') as detailed within the report 2. Delegate to the Director of Finance, in consultation with the Executive Member for Finance, any future amendments to the Policy in respect of Electric Vehicle Charging Points and Electric Vehicle Forecourts.
<p>Corporate priorities</p>	<p>Working Together for West Oxfordshire</p>
<p>Key Decision</p>	<p>No</p>
<p>Exempt</p>	<p>No</p>
<p>Consultees/ Consultation</p>	<p>Chief Executive, Director of Governance & Regulatory Services, Director of Finance, Director of Place, Head of Legal Services, Executive Director, Managing Director (Publica)</p>

1. EXECUTIVE SUMMARY

- 1.1** To consider proposed changes to the Discretionary Rate Relief Policy ('the Policy') following recent government announcements and to note the policy to underpin these schemes, as appended to this report at Annex A.

2. BACKGROUND

- 2.1** The Local Government Finance Act 1988 and subsequent legislation require West Oxfordshire District Council ('the Council') to grant mandatory relief for premises occupied by charities and similar organisations that own or occupy them wholly or mainly for charitable purposes. Likewise, certain premises situated within a rural settlement area are eligible for mandatory relief. Powers have also been granted under the Localism Act 2011, which allow for the granting of discretionary rate relief to any premises where the Council feels the granting of such relief would be of benefit to the local community.
- 2.2** Whilst the Council is obliged to grant relief to premises, which fall within the mandatory category, the Council also has powers to grant discretionary relief and reductions to ratepayers, subject to certain criteria being met.

3. MAIN POINTS

- 3.1** The Council already has a Policy, which, following recent announcements from Central Government in respect of new reliefs, has been reviewed.
- 3.2** In the case of the new reliefs, some guidance has been issued by Government outlining actions expected to be taken by local authorities. The amended Policy for the granting of Discretionary Rate Relief includes Government guidance where appropriate but also looks to target discretionary relief in line with the Councils visions and priorities.
- 3.3** Addendum 2, of the Policy has been included, which details the new relief for Pubs and Live Music Venues.
- 3.4** Addendum 3, of the Policy has been included, which details the new Supporting Small Business relief.
- 3.5** From 1 April 2026, a new 10 years 100% business rate relief will also be introduced for standalone electric vehicle (EV) charging points and EV-only forecourts. The guidance for this has not yet been published. However, when this has been published, the Policy will be updated to reflect this, and it is requested that authority is delegated to the Director of Finance in consultation with the Executive Member for Finance to make these revisions.
- 3.6** On 25 March 2026 at Full Council, the following motion was carried forward:
- 1) Agree that the Executive and CEO should consider whether a Local Discount and Incentives policy could enhance the economic objectives and wellbeing of the District.
 - 2) Agree that communications with small businesses and all residents be reviewed and improved to ensure they all understand the 2026-27 £800 cap and how that will vary during transition to their new rates in the coming years.
- 3.7** In response to this motion, it should be noted that the Discretionary Rate Relief Policy has already been reviewed and amended to include additional information to support public houses and small businesses. The Councils webpages have also been updated giving additional information regarding the changes from April 2026.

- 3.8 During March 2026, all businesses within the district would have received their 2026/27 annual bill giving the details of charges for the financial year. Additional information was also added to the reverse of those bills, again, to support and signpost businesses to further advice.
- 3.9 Any business can contact the Councils Revenue Team to discuss any concerns they have regarding their annual charge. Despite it being a revaluation year, with changes to the business rates multipliers, contact from businesses has not been as high as expected for the start of a new financial year.
- 3.10 It should also be noted that any business who is struggling financially can make an application for discretionary relief, or hardship relief. The details for this can also be found on the Council's website.
- 3.11 If the number of businesses contacting the Councils Revenue Team increases in the coming months, then the policy and communications will be reviewed again to ensure that the Council is providing all the help and support that businesses need following the recent changes.

4. FINANCIAL IMPLICATIONS

- 4.1 Following the introduction of the Localised Business Rate Retention scheme in 2013 the cost of rate relief falls differently between organisations. All rate relief is funded by the Collection Fund and therefore it is split in the pre-set proportions of the Collection Fund as follows:

Central Government	50%
County Council	10%
District Council	40%
- 4.2 For 2026/27 to 2028/29 the Government will, in line with the eligibility criteria set out in Addendum 2 and 3 to Annex A, reimburse the Council for using its discretionary relief powers under section 47 of the Local Government Finance Act 1988 to grant Pubs and Live Music Venues Relief and 2026 Support Small Business Relief.

5. LEGAL IMPLICATIONS

- 5.1 Section 47 of the Local Government Finance Act 1988 gives powers to District councils to grant discretionary rate relief. Subsequent legislation in the Localism Act 2011 has extended these powers to allow wider granting of local discretionary relief.

6. RISK ASSESSMENT

- 6.1 There is a risk that if government increases the rate retention percentage of 50% (of which the remaining 10% is for the County Council) to 75% (as previously anticipated) the financial impact on District Councils would increase significantly.

7. EQUALITIES IMPACT

- 7.1 These are no specific equality issues, but the Council will consider more favourably applications for discretionary relief from organisations that work in the district with vulnerable, disadvantaged, or underrepresented groups.

8. CLIMATE AND ECOLOGICAL EMERGENCIES IMPLICATIONS

- 8.1 The Government is implementing significant business rate reliefs to accelerate the installation of EV charging infrastructure, with a 100%, 10-year relief on business rates for eligible EV charging points and EV-only forecourts starting from 1 April 2026 with the aim to make EV

charging more affordable and accessible, thereby accelerating the transition to electric vehicles and supporting the reduction of greenhouse gas emissions.

9. ALTERNATIVE OPTIONS

9.1 None

10. BACKGROUND PAPERS

10.1 None

(END)



WEST OXFORDSHIRE
DISTRICT COUNCIL

DISCRETIONARY RATE RELIEF POLICY 2026

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1. Introduction

1.1 West Oxfordshire District Council ('The Council') understands the importance that local businesses and organisations play in achieving its priorities and ensuring its communities and businesses are able to develop and thrive within the district.

1.2 Councils have the power to award relief from the payment of Non-Domestic Rates (Business Rates) to organisations and businesses that meet certain criteria. Public funds are not, however, unlimited and the Council Taxpayers of the district meet a proportion of any relief granted. The Council therefore needs to be satisfied that money invested this way will be repaid in economic and/or community benefit.

1.3 The power for granting Discretionary Rate Relief is provided for by Section 47 of the Local Government Finance Act 1988. This has been amended by subsequent legislation that gives wider powers to grant discretionary relief to any ratepayer where the authority feels the granting of such relief would benefit the local community.

1.4 The Discretionary Rate Relief Policy ('the Policy') is designed to provide guidance to Officers and ratepayers on the application of Discretionary Rate Relief. ('DRR')

1.5 The Policy covers the following types of DRR:

- Charitable rate relief
- Community Amateur Sports Clubs (CASCs)
- Rate relief for not-for-profit organisations
- Hardship relief
- Temporary relief for partly occupied properties
- Local discounts and incentives

1.6 This Policy document outlines the various areas of local discretion and the Council's approach to the various reliefs. This approach has regard to the impact:

- of granting discretionary relief on the Council's wider financial position and the impact on its Council Taxpayers;
- on the organisations and businesses that currently receive or may apply for relief in the future;
- on the residents of the Council if relief is awarded and the economic benefits to the district.

2. The Discretionary Rate Relief Scheme

2.1 DRR is granted in accordance with Section 43 of the Local Government Finances Act 1988 and Sections 47 and 49 of the Local Government Finance Act 1988 as amended by the Localism Act 2011, and the Non-Domestic Rating Act 2023.

2.2 Section 69 of the Localism Act amended section 47 of the Local Government Finance Act 1988 to allow billing authorities to fund their own local discounts. The Council can grant business rate discounts and incentives as it sees fit within the limits of primary legislation

and the rules on State Aid. These powers can be used to encourage new business and investment as well as support local shops or services to the community.

2.3 The legislation requires the Council to maintain a DRR scheme to award relief of up to 100% to certain organisations and businesses that operate within specified criteria. This includes:

- Charitable bodies already in receipt of mandatory relief of 80%. The Council has a discretion to 'top-up' this relief to 100% of the business rates due
- Registered CASCs already in receipt of mandatory relief of 80%
- Non-profit making organisations – the Council has discretion to grant relief of up to 100% of the business rates due
- DRR for 'other rural businesses'
- Relief on the grounds of hardship
- Relief for part-occupied premises
- Local discounts and incentives

2.4 In making decisions the Council may:

- Grant relief up to a maximum of 100% of the business rates due;
- or
- Refuse any application for relief

2.5 Mandatory relief can be backdated to previous financial years. The Non-Domestic Rating Act 2023 removes the restriction that prevented billing authorities from making a decision to award discretionary rate relief more than six months after the end of the relevant financial year. .

2.6 In the majority of cases, DRR will be granted for a period of one financial year. Successful applications will be sent a letter confirming the new award of DRR. This letter will explain the period of award and the date it will end.

3. The application process

3.1 Applications for DRR must be made by completing an application form and submitting the relevant supporting information that includes:

- Details of the applicant's main purposes and objectives (where applicable) as set out in a written constitution, a memorandum of association or membership rules;
- A full set of audited accounts relating to the last two financial years. Where audited accounts are not available projections should be provided instead, along with bank statements;
- Details of how the organisation meets the relevant criteria detailed in these guidelines

3.2 Any applications that are made without the supporting documentation will be subject to a decision being made solely on the information that is available at the time of the decision.

3.3 As a guide, to be eligible for DRR a charity/organisation must not have enough unrestricted funds/reserves to continue to operate for more than 12 months unless a business plan exists detailing how these additional funds are to be used to benefit the local community.

3.4 In exceptional cases, DRR will be granted to organisations that have enough financial resources in unrestricted funds/reserves to continue to operate for more than 12 months. This may include charities and community organisations that require a large amount of available resources to sustain the service they deliver to the community. In such cases, the application must be able to demonstrate it offers a service which the local residents depend on and which they would be unlikely to find elsewhere in the district.

3.5 The Council will aim to make a decision within one calendar month of the application and supporting information being received. Decisions on the award of DRR will be made by the Executive Member with responsibility for Finance. Ratepayers are required to continue to pay business rates whilst their application is being considered. Failure to make payment will result in the Council pursuing collection through the usual enforcement procedures that could result in Court action.

3.6 An unsuccessful applicant may make a request for the Council to review its decision, but only where:

- 1) Additional information relevant to the application that was not made available at the time the decision was made becomes available.
- 2) There are grounds to believe the application or supporting information was not interpreted correctly at the time the decision was made.

3.7 A request for a review must be made within one calendar month of notification of the decision and must set out the reasons for the request and any supporting information. Cases will be reviewed by the Executive.

3.8 In line with the model of Business Rate Retention Scheme, the cost of awarding discretionary relief is apportioned as follows:

- 50% will be funded by Central Government
- 40% will be funded by the Council
- 10% will be funded by Oxfordshire County Council

3.10 Any decision regarding DRR will be communicated to the applicant in writing. Where the decision is a refusal, the reasons for refusal will be provided in the letter.

3.11 A review of the guidelines will be undertaken every 3 years in line with the Valuation Office Agency's revaluation cycle, or if business rates legislation is amended, or as necessary to ensure it complies with current legislation and the Council's priorities.

3.12 The ratepayer must inform the Council immediately of any changes which may affect their eligibility for relief.

4. Charitable Rate Relief

4.1 Mandatory Rate Relief of 80% is granted to charities where:

- The ratepayer is a charity or the trustee of a charity; and

- The property is wholly or mainly used for charitable purposes (including charity shops where the goods sold are mainly donated and the proceeds are used for the purposes of the charity).

4.2 Registration under the Charities Act 1993 is conclusive evidence of charitable status. Bodies which are exempt charities are also eligible for mandatory relief.

4.3 In cases where a charity is in receipt of mandatory relief of 80%, the Council has direction to grant up to 20% DRR (top-up). The Council will consider applications for DRR from charities based on their own merits on a case-by-case basis. The principal consideration in awarding DRR is that it is in the best interests of the residents and Council Taxpayers of West Oxfordshire District to do so and it produces a local benefit, as the Council must contribute to the cost of each award.

4.4 Each case will be assessed on its own merits, but generally top-up DRR will only be awarded to the following charities or excepted organisations:

- Scouts, guides, cadets and other clubs and organisations for young people;
- Organisations providing support in the form of advice, employment training and counselling;
- Community schemes including those providing support for those over retirement age, community transport and volunteer organisations;
- Charitable supporting clubs;
- Armed Forces veterans associations;
- Locally based leisure and cultural organisations.

4.5 The following general exclusions will apply:

- 'Top-up' relief will only be granted to local charities (defined as those set up with the sole purpose of assisting residents of West Oxfordshire District and whose main office is situated within the District);
- Unless a special case for financial hardship can be proved 'top-up' to national charities (including charity shops) will not be awarded;
- 'Top-up' relief for Housing Associations will not be granted.

5. Registered Community Amateur Sports Clubs (CASCs)

5.1 Registered CASCs are entitled to 80% mandatory relief. The Council will consider applications for DRR 'top-up' from CASCs based on their own merits on an application-by-application basis.

5.2 The Council will consider applications that can demonstrate:

- The contribution the organisation makes to West Oxfordshire District;
- The club is open to the whole community and its membership fees are not excessive;
- It is a non-profit organisation;
- Evidence that every effort is made by the organisation to encourage open membership from groups such as young people, disabled persons, and those over retirement age;
- Schemes of education and training are provided particularly for young people, disabled persons, women and those over retirement age;

- How the CASC supports and links into the Council's priorities.

5.3 Applications will only be considered where the club has an open access policy. If a club accepts members who have reached a certain standard, rather than seeking to promote the attainment of excellence by developing sporting aptitude, it does not fulfil the requirements.

5.4 Although clubs should be open to all without discrimination, single sex clubs may be permitted where such restrictions are a genuine result of physical restraint (such as changing room facilities) or the requirement of the sport. In such cases, the application will be required to provide evidence of these factors.

5.5 It should be noted that sports clubs that run a bar are unlikely to be awarded discretionary rate relief if their main purpose is the sale of food and drink. If the sale of food and drink by the organisation aids the overall operation and development of the organisation meaning it achieves its objectives this is permissible if the principal objectives of the organisation meet the eligibility criteria detailed in 5.2. If the bar makes a profit this relief must be reinvested to help the organisation meet its principal objectives. Financial information will be required to evidence any profit and its use.

6. Rate relief for not-for-profit organisations

6.1 Not-for-profit organisations that are not classed as registered charities or CASCs can apply for DRR of up to 100%. Such organisations include those that are philanthropic, religious, concerned with education or social welfare, science, literature, the fine arts, recreation or are otherwise beneficial to the community.

6.2 The Council will consider applications from organisations which can demonstrate:

- Its activities support at least one of the Council's priorities;
- It promotes its service for the benefit of West Oxfordshire District residents;
- Membership of the organisation is open to all members of the community;
- The facilities of the organisation are to be made available, where practicable, to other organisations and groups;
- The organisation operates in such a way that it does not discriminate against any section of the community;
- It is not established or conducted for the primary purpose of profit.

6.3 If the organisation applying for DRR requires membership or any entry fee the Council will consider whether:

- Membership is open to everyone regardless of race, ethnicity, sex, marital or parental status, sexual orientation, creed, disability, age, religious affiliation or political belief;
- The subscription or fee is set at a level which is not prohibitively high and is affordable by most sections of the community;
- Fee reductions are offered to certain groups, for example the under 18s and over 60s;
- Membership is encouraged from the unemployed, young people not in employment, education or training, those of retirement age and people with disabilities.

6.4 Where the applicant organisation requires membership, at least 50% of members should reside within the West Oxfordshire District and evidence of this will be required.

6.5 The organisation must provide a copy of their constitution and copies of the latest two years of audited annual accounts where available.

7. Hardship Relief

7.1 The Council has discretion under Section 49 of the Local Government Finance Act 1988 to grant relief of up to 100% where hardship is demonstrated. Hardship relief can only be considered if it would be reasonable to do so in the interests of Council Taxpayers in general.

7.2 Hardship relief will be awarded where the business is suffering from unexpected hardship that is outside of the normal risks associated with business. Reduction or remission of business rates on the grounds of hardship will only be made in exceptional circumstances.

7.3 Hardship relief is granted at the discretion of the Council which can reduce or remit the amount of business rates due provided it is satisfied that:

- The ratepayer would sustain hardship if it did not do so; and
- It is reasonable to do so having regard to the interests of its council taxpayers,

7.4 The following factors will be considered in assessing the application:

- The test of hardship needs not to be confined strictly to financial hardship. All relevant factors affecting the ability of the business to meet its rates liability will be considered.
- The interests of Council Taxpayers in the area may be wider than direct financial interests. Examples of this include where employment prospects in the area would be worsened by a company going out of business or the amenities of the area being reduced.
- The ratepayer must provide evidence of hardship, for example a severe loss or marked decline in trade compared to similar periods in previous years.
- The ratepayer must be able to show evidence of its viability for the future, which is two years for these purposes.

7.5 A business will not be considered for hardship relief in the following circumstances:

- Where the business is profitable;
- Where the business has experienced a minor loss in trade;
- Where the drawings/remuneration of directors, partnerships or sole traders are of an amount not deemed reasonable by the Council;
- Where the business is new and hardship relief is being requested to fund the initial progression of the business;
- Where the property is empty;
- Where similar goods or services are already being provided in the locality or within a reasonable distance.

7.6 Prior to any award being made the business is expected to act to mitigate or alleviate their hardship by:

- Considering other options such as renegotiating with creditors;
- Contacting the Council's Business Advice officer;
- Having in place a business plan to address the hardship.

7.7 Applications for hardship relief shall be regarded as a last resort and will only be accepted after consideration of any other forms of rate relief for which the applicant may be eligible.

7.8 The period and amount of any award will be determined on a case-by-case basis, but may be up to 100% of business rates liability.

7.9 Hardship relief will only be granted for short periods of time and usually up to a maximum of 6 months.

8. Properties partly occupied for a temporary period

8.1 There may be times where a property is only partly occupied for a short period. This may be due to a business relocating to a new property. In certain circumstances, the Council may use its discretion to award partly occupied relief that is also known as Section 44a (Section 44a of the Local Government Finance Act 1988) relief.

8.2 In these circumstances, the Council may request that the Valuation Office Agency apportion the rateable value of the property between occupied and unoccupied parts.

8.3 Section 44a relief may be awarded in the following circumstances:

- Where the occupied and unoccupied parts of the property can easily be separately assessed; or
- Where there are short-term practical or financial difficulties in either occupying or vacating the premises.

8.4 The part occupation must be for a temporary period only. DRR will not be awarded where the partial occupation is due to the normal day-to-day operation of the business, for example, where a warehouse has despatched a large order and no longer needs to store stock.

8.5 For the purposes of this Policy, a period of up to 6 months will be considered temporary. Periods of time exceeding 6 months will be treated as a permanent change and will not be eligible for partly occupied relief.

8.6 Relief will not be awarded where it appears to the Council that part of the property is being kept empty for the sole purpose of claiming rate relief.

8.7 Prior to an award being made, a visit to the premises will be made by a Council Officer to establish the exact area of the property that is empty. The application must be supported by a plan of the property that clearly marks the boundary of the occupied and unoccupied parts. This plan will be given to the Valuation Office Agency to apportion the rateable value. Further visits may be made to the property throughout the duration of the DRR to establish that the property is still partly occupied.

8.8 Part occupied DRR will end if one of the following applies:

- The financial year comes to an end;
- The end of the award;

- Where part or all the unoccupied parts become occupied;
- Where the whole of the property becomes unoccupied;
- Where the liability for the property changes.

9. State Aid

9.1 From 1 January 2021, the United Kingdom left the EU Single Market and Customs Union and is no longer subject to the De Minimis Regulations.

9.2 The Government has introduced its own rules regarding state subsidies. DRR is considered a subsidy under the rules, but the matters that must be considered all relate to the effect of the subsidy on international trade. In making an award the public body making it must consider:

- effects on international trade;
- the subsidy is prohibited under the World Trading organisation (WTO) rules;
- are in line with those agreed by the UK –EU Cooperation and Trade Agreement;
- are unlikely to trigger a dispute under WTO trade rules.

9.3 It is unlikely that an award of DRR would fall counter to these rules.

10. Complaints and Appeals

10.1 Any customer who feels that they have not been correctly dealt with can use the Customer Feedback procedure to make a complaint.

10.2 Rating Law does not allow a ratepayer to appeal a decision by the Council on DRR. However, in the interest of natural justice and in keeping with customer care practice and principles of open government, this Policy provides a mechanism for review of any decision.

10.3 If a ratepayer is unhappy with the decision made, full details should be submitted, in writing to the Council within one calendar month of notification of the decision. Any review will be considered by Executive.

11. Fraud

11.1 The Council is committed to the prevention and detection of fraud and the protection of public funds. Cases of suspected fraud will be referred to the Counter Fraud and Enforcement Unit (CFEU) for investigation, which may result in clawback of payments made and/or further action being taken against an individual.

Appendix A

Category of Ratepayer	Mandatory Relief	Discretionary Relief
Charities	80%	Up to 20%
Registered Community Amateur Sports Clubs (CASCs)	80%	Up to 20%
Non-Profit Organisations	Nil	Cases considered on individual merit
Hardship Relief	Nil	Cases considered on individual merit
Partly Occupied Hereditament	Nil	Cases considered on individual merit

Addendum I

Rural Rate Relief

Rural Rate Relief is available for Post Offices, village shops, petrol filling stations and Public Houses subject to rateable value restrictions, where they are the only business of that type in the rural settlement.

The Government announced in the Autumn Statement on 23 November 2016 that the relief would increase from 50% to 100% from 1 April 2017.

As a measure the Government has not changed legislation, instead local authorities are required to adopt a local scheme and decide each individual case using their DRR powers introduced by the Localism Act (under Section 47 of the Local Finance Act 1988).

Eligibility Criteria

Properties that will benefit from Rural Rate R will be hereditaments that are located in a rural settlement with a population of less than 3,000 and are either:-

- a) The sole general store, food shop or Post Office with a rateable value of up to £8,500 or;
- b) The sole Public House or petrol filling station with a rateable value of up to £12,500

The Districts Rural Settlement List is reviewed annually, and designates settlements within a rural area, which have a population of 3,000 or less.

Amount of Rural Rate Relief available

Anyone who is entitled to mandatory Rural Rate Relief will be eligible for the increased level of discount of 100% off their business rate liability.

Recalculation of Rural Rate Relief

The amount of Rural Rate Relief awarded will be recalculated in the event of a change in circumstances, including a backdated change to the rateable value of the hereditament, whether arising during the year in question or during a later year.

Addendum 2

Relief for Pubs and Live Music Venues

From 27 January 2026, the Government announced that eligible pubs and live music events in England will receive a 15% reduction on their business rates bills for the 2026/27 financial year.

Hereditaments that meet the eligibility criteria for pubs and live music venues relief will be occupied hereditaments which meet all of the following conditions for the chargeable day:

- a) They are wholly or mainly used:
 - As a pub
 - As a live music venue

Pubs

A pub is considered to mean a hereditament where the following criteria apply:

- Is open to the general public
- Allows free entry other than when occasional entertainment is provided
- Allows drinking without requiring food to be consumed
- Permits drinks to be purchased at a bar

For these purposes, the meaning of a pub does not include:

- Restaurants, cafes, nightclubs, snack bars
- Hotels, guesthouses, boarding houses
- Sporting venues
- Festival sites, theatres, cinemas
- Museums, exhibition halls
- Casinos

The proposed exclusions in the list above is not intended to be exhaustive and it will be for the Council to determine those cases where eligibility is unclear.

Where eligibility is unclear, the Council should also consider broader factors in its assessment – i.e. in meeting the stated intent of the Policy that it demonstrates the characteristics that would lead it to be classified as a pub by the natural meaning of the word. For example: being owned and operated by a brewery, establishments that are open to wide sections of local communities and practically operate as a pub for that local community e.g. working men's club.

Live Music Venues

A live music venue is considered to mean a hereditament that:

- a) Is wholly or mainly used for the performance of live music for the purposes of entertaining an audience
- b) Can be used for other activities but only if those other activities:
 - Are ancillary or incidental to the performance of live music (e.g. the sale of food or drink to audience members)

- Do not affect the primary use of the premises for the performance of live music (e.g. because the activities are infrequent such as use of the venue as a polling station or fortnightly community event)

Hereditaments are not a live music venue for the purpose of this relief if the property is wholly or mainly used as a nightclub or a theatre, for the purposes of the Town and County Planning (Use Classes) Order 1987 (as amended).

How much relief will be available

The eligibility for the relief and the relief itself will be assessed and calculated on a daily basis. The following formula will be used to determine the amount of relief to be granted for a chargeable day for a particular hereditament in the 2026/27 financial year:

a) Amount of relief to be granted = $V \times 0.15$ (i.e. 15% relief) where:

- V is the daily charge for the hereditament for the chargeable day after the application of any mandatory relief and certain other discretionary reliefs in line with guidance.

The relief is not subject to any cap or the Minimal Financial Assistance limit in Subsidy Control.

Addendum 3

Supporting Small Business Relief

At the Autumn Budget 2025 the Chancellor announce the 2026 Supporting Small Business Relief scheme (SSBR) for the years 2026/27 to 2028/29. This will cap bill increases at £800 per year or the relevant caps with transitional relief, whichever is the greatest for any business losing eligibility for certain reliefs, including SBRR and Rural Rate Relief, and 40% Retail, Hospitality and Leisure Relief at the 2026 Revaluation. SSBR was first introduced at the 2017 revaluation to support ratepayers facing bill increases greater than the Transition Relief caps due to loss of SBRR and Rural Rate Relief.

The purpose of this Policy is to specify how the Council will operate its discretionary powers in the Local Government Finance Act 1988, section 47, and to indicate the factors the Council will consider when deciding if SSBR can be awarded.

The Council will automatically calculate and award the relief to those properties that meet the qualifying criteria and have seen a large increase in their bills as a result of losing some or all of their:

- SBRR or Rural Rate Relief,
- 40% Retail, Hospitality and Leisure Relief (RHL), and/or
- 2023 SBRR.

Charities and CASCs, who are already entitled to 80% mandatory, are not eligible for the 2026 SSBR.

To support eligible ratepayer, the 2026 SSBR will ensure that the increase in the bills of these ratepayers is limited to £800 per year or the relevant caps within transitional relief, whichever is the greater.

For those ratepayers receiving 2023 SSBR on 31 March 2026, including those also receiving SBRR, Rural Rate Relief and/or RHL, any eligibility for 2026 SSBR will end of 31 March 2027. All other eligible ratepayers remain in 2026 SSBR for either 3 years or until they reach the bill they would have paid without the scheme. A change of ratepayers will not affect eligibility for the SSBR scheme, but eligibility will be lost if the property falls vacant or becomes occupied by a charity or CASC.

There is no second property test for eligibility for the 2026 SSBR scheme. However, those ratepayers who during 2025/26 lost entitlement to SBRR, because they failed the second property test but have, under the rules for SBRR, been given a 12-month period of grace before their relief ended (or from 27 November 2025, 3 years), can continue on the 2026 SSBR scheme for the remainder of their period of grace.

SBRR or rural rate relief should not be applied to further reduce the bill if in receipt of SSBR. For example:

- A non-RHL ratepayer eligible for SBRR whose rateable value has increased from £3,000 (paying £0 in 2025/26) to £14,000 would be paying the following in 2026/27 before the 2026 SSBR:
 - I. Bill before reliefs (including 1p Transitional Relief Supplement): £6,188
 - II. Bill after transitional relief: £1,572
 - III. Bill after SBRR: £1,048
- After 2026 SSBR the bill for 2026/27 would be reduced to £800. No further SBRR should be applied and no addition for transition relief supplement is made to the bill within SSBR.

The same principle applies to properties for which a Section 44A certificate has been granted (apportionment of rateable values for partly occupied properties). The presence of a section 44A certificate should not further reduce the bill found under 2026 SSBR.

All other discretionary reliefs, including those funded by section 31 grants, should be considered after the application of 2026 SSBR.

Subsidy Control

The 2026 SSBR is likely to amount to a subsidy. Therefore, any relief provided by local authorities under the scheme will need to comply with the UK's domestic and international subsidy control obligations which contains guidance and information for the new UK subsidy control regime.

To the extent that a local authority is seeking to provide relief that falls below the Minimal Financial Assistance (MFA) thresholds, the subsidy control Act allows an economic actor, (e.g. a holding company and its subsidiaries) to receive up to £315,000 in a three-year period, consisting of the 2026/27 and the previous two financial years. MFA subsidies cumulate with each other and with other subsidies that fall within the category of 'Minimal or Services of Public Economic Interest (SPEI) financial assistance'. Any other subsidies claimed under the Small Amounts of Financial Assistance limit of the Trade and Cooperation Agreement should be counted under the £315,000 allowance.

In those cases where it is clear to the local authority that the ratepayer is likely to breach the cash cap of the MFA limit then the Council will automatically withhold the relief.

Recalculation of Reliefs

As with other reliefs, the amount of SSBR awarded should be recalculated in the event of a change of circumstances. This could include, for example, a backdated change to the rateable value or to the hereditament. This change of circumstances could arise during the year in question or during a later year.

Splits and Mergers

Hereditaments will be eligible for 2026 SSBR where they have:

- a) Come into existence because of the circumstances described in paragraph 1 of the 2026 Transitional Relief Regulations, and,
- b) Where one of the hereditaments from which the new hereditament was formed in whole or in part was for the day immediately before the creation day eligible for 2026 SSBR.

The Ministry of Housing, Communities and Local Government (MHCLG) will fund local authorities to apply a chargeable amount under section 47 of Local Government Finance Act 1988 found in accordance with the following principle:

- That the protection offered by 2026 SSBR (that the bill will not rise by more than £800 per annum, or the transitional relief caps whichever is the greater) will continue to apply in principle to that part of the newly created hereditament which was immediately before the creation day in 2026 SSBR, and,
- That increases (or reductions) in overall rateable value arising from the split or merger are not subject to the protection of 2026 SSBR.

Detailed guidance for operation of the 2026 Support Small Business Relief (2026 SSBR)

Detailed guidance for the scheme, including day 1 eligibility rules, ceasing of eligibility for the scheme rules and the calculation of chargeable amounts under the scheme, are contained in the MHCLG guidance document at: <https://www.gov.uk/government/publications/business-rates-relief-2026-supporting-small-business-relief-local-authority-guidance>

How payments will be made

All relief awarded will be credited to the ratepayer's Business Rates account.

Overpayments

The Council will recover all overpayments of SSBR through the ratepayer's Business Rates account.

Right of Appeal


If a ratepayer is aggrieved by a decision made under this Policy, you must write and tell us why you think the decision is wrong.

Your case will be considered by someone who has not been involved in the original determination. They will write to tell you what has happened, normally within 21 days of reconsidering your appeal.

Fraud

The Council is committed to the prevention and detection of fraud and the protection of public funds. A ratepayer who tries to fraudulently apply for SSBR by falsely declaring their circumstances or providing a false statement will be referred to the CFEU for investigation which may result criminal proceedings being instigated.

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 <p>WEST OXFORDSHIRE DISTRICT COUNCIL</p>	<p>WEST OXFORDSHIRE DISTRICT COUNCIL</p>
<p>Name and date of Committee</p>	<p>EXECUTIVE - 10 JUNE 2026.</p>
<p>Subject</p>	<p>UPDATED PROCUREMENT AND CONTRACT MANAGEMENT STRATEGY</p>
<p>Wards affected</p>	<p>All</p>
<p>Accountable member</p>	<p>Councillor Alaric Smith - Executive Member for Finance Email: alaric.smith@westoxon.gov.uk</p>
<p>Accountable officer</p>	<p>Claire Locke - Executive Director Corporate Services, Publica Email: democratic.services@westoxon.gov.uk</p>
<p>Report author</p>	<p>Ciaran O’Kane – Senior Procurement Business Partner, Publica Email: democratic.services@westoxon.gov.uk</p>
<p>Summary/Purpose</p>	<p>To present an updated draft Procurement and Contract Management Strategy</p>
<p>Annexes</p>	<p>Annex A – Draft Procurement and Contract Management Strategy</p>
<p>Recommendation(s)</p>	<p>That the Executive resolves to:</p> <ol style="list-style-type: none"> I. Approve the updated Procurement and Contract Management Strategy
<p>Corporate priorities</p>	<p>Procurement supports all key Council Priorities</p> <ul style="list-style-type: none"> • Putting Residents First • A Good Quality of Life for All • A Better Environment for People and Wildlife • Responding to the Climate and Ecological Emergency • Working Together for West Oxfordshire
<p>Key Decision</p>	<p>NO</p>
<p>Exempt</p>	<p>NO</p>

Consultees/ Consultation	<ul style="list-style-type: none">• Publica Executive Team• WODC Climate Change Team• Publica Data Protection Team
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1. EXECUTIVE SUMMARY

- 1.1 The draft WODC Procurement and Contract Management Strategy sets out a structured, approach to commissioning, procurement supplier management, and contract management. Its primary objective is to ensure that procurement activity delivers value for money, supports organisational priorities, and mitigates commercial, operational, and reputational risk.

2. BACKGROUND

- 2.1 The revision of the current Procurement and Contract Management Strategy was partly in response to an External Audit recommendation.
- 2.2 Furthermore, the landscape of Public Procurement changed with the rolling out of the Procurement Act 2023 (PA23). The team recognised the importance of the Council having a strategy that incorporated changes and best practice as result of the legislation change.
- 2.3 Finally, the Strategy sets out the responsibility Procurement will have to support WODC in preparation for Local Government Reorganisation.

3. MAIN POINTS

- 3.1 The strategy recognises procurement as a strategic enabler rather than a transactional function. It focuses on strengthening governance, improving commercial capability, and enhancing supplier relationships to achieve sustainable, high-quality outcomes.
- 3.2 The Strategy is designed to ensure that all procurement and contract activities are conducted in a consistent, controlled, and value-driven manner that supports the Council's strategic objectives. At its core, the strategy seeks to maximise value for money across the full commercial lifecycle, while maintaining robust governance, ensuring regulatory compliance, and effectively managing risk.

4. ALTERNATIVE OPTIONS

- 4.1 Not Applicable

5. CONCLUSIONS

- 5.1 The updated Procurement and Contract Management Strategy will ensure that all Procurement activity will be carried out in line with best practice.
- 5.2 The revised strategy also reinforces the Councils vision – 'Shaping West Oxfordshire as a District which offers a fulfilling and meaningful quality of life for our residents with opportunities for all to flourish, a thriving and prosperous place for entrepreneurs and businesses, where local people and visitors can enjoy the beauty and heritage of our landscape, built, farmed and natural environment'

6. FINANCIAL IMPLICATIONS

- 6.1 There are no financial implications for this report. However, compliance with the Councils Contract Procedure rules will support the best use of taxpayers' money.

7. LEGAL IMPLICATIONS

- 7.1 There are no specific legal implications from the report or the strategy, however the Council continues to have a legal duty to comply with the Public Procurement Regulations

8. RISK ASSESSMENT

- 8.1 There is a potential risk that the Procurement and Contract Management Strategy may need to be updated as and when the Cabinet Office release further guidance. This has been quite regular since PA23 went live.

9. EQUALITIES IMPACT

- 9.1 There are no equality implications from this report.

10. SUSTAINABILITY IMPLICATIONS

- 10.1 This Executive report is exempt from a SIA. The Climate team have worked closely with Procurement and whilst the implications of implementing the Strategy will have sustainability implications the strategy itself does not.
- 10.2 Sustainable Procurement, Supporting Local SMEs and Social Value have been identified as Strategic Objectives within the Procurement and Contract Management Strategy.

11. BACKGROUND PAPERS

- 11.1 No Applicable

(END)

Procurement and Contract Management Strategy



WEST OXFORDSHIRE
DISTRICT COUNCIL

Approved by

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Background

West Oxfordshire District Council manages gross expenditure of approximately £62 million per annum (2025/26). The Council uses a range of commissioning,

procurement and contracting approaches to deliver services in a way that is open, fair, transparent and cost effective. These approaches include the use of simple standard terms and conditions for low risk and low value contracts, framework agreements, recognised industry standard contracts and bespoke contractual arrangements where appropriate.

Effective commissioning, procurement and contract management is fundamental to contributing to the delivery of the Council's priorities:

1. Putting Residents First
2. Enabling a Good Quality of Life for All
3. Creating a Better Environment for People and Wildlife
4. Responding to the Climate and Ecological Emergency
5. Working Together for West Oxfordshire

By applying proportionate commercial approaches and robust contract management, the Council will ensure that public money is spent responsibly and that services deliver the outcomes residents expect.

1. Introduction

The West Oxfordshire Procurement and Contract Management Strategy 2026–2028 supersedes the 2023 Strategy and has been developed in response to significant legislative change, most notably the introduction of the Procurement Act 2023. This legislation establishes a new statutory framework for public sector procurement, promoting greater transparency, enhanced flexibility, and improved access for small and medium-sized enterprises (SMEs).

The overarching purpose of this Strategy is to ensure that all commissioning and procurement activity is undertaken in a consistent, transparent and proportionate manner, aligned with best practice and fully compliant with all legislative and policy requirements. The Strategy supports the achievement of value for money while ensuring that procurement outcomes contribute directly to the Council's wider strategic objectives.

In addition, the Strategy provides a clear framework to support organisational readiness and resilience in advance of Local Government Reorganisation, ensuring continuity, compliance and commercial discipline through a period of structural change.

West Oxfordshire District Council's procurement function is delivered through Publica Limited, its shared services company. This Strategy applies equally to all procurements undertaken by Publica on behalf of the Council, ensuring a consistent, compliant and value for money approach across all arrangements.

2. Setting the Scene for Procurement

2.1 Our Vision

West Oxfordshire District Council will use commissioning, procurement and contract management as a strategic tool to deliver value for money, high-quality services and lasting benefits for residents and communities.

Through intelligent commissioning, whole life commercial decision making and strong contract management, the Council will secure outcomes that:

- Support local priorities and place based delivery.
- Enable housing and regeneration ambitions.
- Strengthen the local and regional economy.
- Reduce carbon emissions and minimise environmental impact.

The Council will operate openly, proportionately and in full compliance with public procurement legislation, ensuring that public funds are used responsibly and that suppliers are treated fairly and consistently.

2.2 Legal Context

West Oxfordshire District Council will carry out all procurement activity in full compliance with the Procurement Act 2023 and its associated regulations, which came into force on 24 February 2025. The Act introduces clearer statutory objectives, enhanced transparency requirements, increased procedural flexibility and measures to improve access to public contracts, particularly for SMEs and local suppliers.

This Strategy also aligns with, and supports compliance with, the following key policies and frameworks:

- National Procurement Policy Statement
- West Oxfordshire District Council Contract Procedure Rules
- West Oxfordshire District Council Carbon Action Plan 2024–2030
- West Oxfordshire District Council Local Code of Corporate Governance
- Counter Fraud and Anti-Corruption Policy
- Sustainable Procurement Policy (subject to approval)

2.3 Commissioning and Procurement

Commissioning is deciding what is needed, why it is needed and how best to deliver it whereas Procurement is the process of contracting with an organisation to deliver the need.

Commissioning and Procurement are intrinsically linked. The procurement function is designed to deliver and support commissioners' intentions in a legal and compliant manner, delivering best value for money. Whilst the procurement function sits centrally within Publica and Commissioning can sit in either Publica or the Council, it is key that we continue to develop and maintain strategic links to all commissioners to ensure procurement activities are undertaken in line with best practice.

To ensure that commissioning and procurement activity is planned, coordinated and aligned to strategic priorities, Publica will maintain a forward procurement plan covering all relevant procurements with a value exceeding £50,000. The forward plan will provide visibility of upcoming activity, support early engagement with stakeholders and the market, and enable appropriate resourcing and governance.

The forward procurement plan will be a standing agenda item at the Commissioning and Procurement Board, which meets monthly. The Board comprises of Senior Managers from both Publica and West Oxfordshire District Council, Procurement and relevant stakeholders and provides oversight, challenge and assurance to ensure that commissioning and procurement activity is aligned with Council priorities, compliant with statutory requirements, and delivers value for money.

2.4 The Role of the Commissioning and Procurement Board and Local Government Reorganisation

Local Government Reorganisation (LGR) represents a period of significant structural, financial and operational change. It brings increased pressure to maintain service continuity, manage risk, and ensure that public money continues to be spent lawfully, transparently and effectively while new governance and delivery arrangements are developed.

In this context, the Commissioning and Procurement Board plays a critical assurance and coordination role, ensuring that commissioning and procurement activity remains strategic, compliant and aligned with both current organisational priorities and future successor authority arrangements.

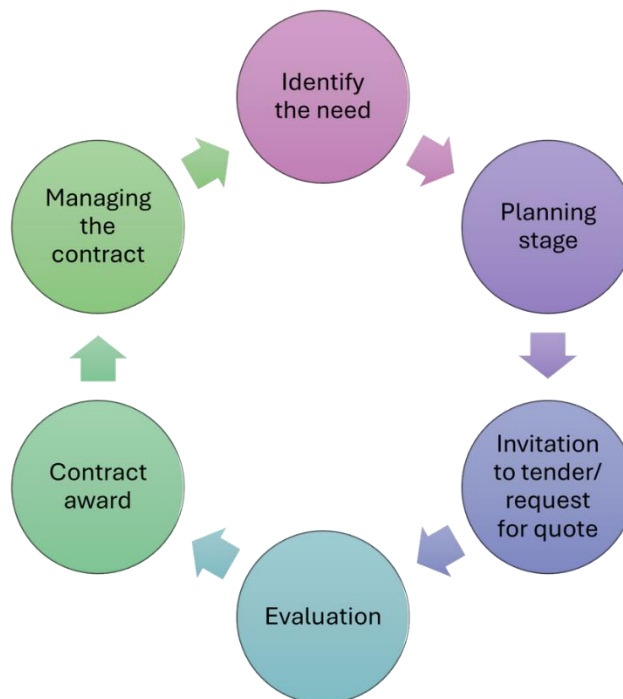
To support WODC with LGR the procurement team will

- Identify contracts that could be ended early, extended, or renegotiated so that no new procurement exercises start in the six months before (November 2027) or twelve months after (March 2029) vesting day (1st April 2028). This will provide capacity for contract novation, developing new governance and identifying opportunities for joint procurement.

- Support a consolidated contract pipeline showing which contracts can be extended, which must be reprocured, and which could shift to future joint procurement.
- Ensure any contract extensions are compliant, justified, and follow consistent principles, aiming to align expiry dates to support future coordinated procurement.
- Avoid short contract extensions unless unavoidable to maintain operational continuity.

3. Strategic Context – Aims and Objectives.

3.1 The Procurement Lifecycle



3.2 The Contract Procedure Rules

The West Oxfordshire District Council Contract Procedure Rules provide a basis for fair competition by providing clear and auditable procedures, which, if followed will give confidence that the Council has a procurement process that are fully accountable and compliant with legislation and the procurement lifecycle.

The Procurement team will ensure that the Contract Procedure Rules are updated in line with the most up to date legislation and best practice.

Furthermore, the Contract Procedure Rules ensure compliance other aspects of the Constitution including schemes of delegation and budgetary control mechanisms.

3.3 The Procurement Toolkit

The Procurement team have developed a Procurement Toolkit to support Officers in their understanding of the Procurement lifecycle.

The procurement toolkit details the 'how to' - providing a step-by-step guide with the templates Officers will need including minimum legal and policy obligations involved in each stage of the process. There are different processes to follow depending on contract value (threshold).

The toolkit will be regularly reviewed and developed and will always have the most up to date guidance and templates.

The Procurement have delivered mandatory procurement training on both process and toolkits to officers who undertake Procurement activity as part of the job role. Further training will be provided as and when required.

3.4 Sustainable Procurement

The Procurement team will aim to ensure that all activities will deliver economic, social and environmental value for residents, in alignment with the Council Plan and the Council's sustainability strategies, including the Carbon Action Plan, which seeks to minimise carbon emissions arising from procurement.

Sustainability will be embedded throughout the entire procurement lifecycle, from commissioning and procurement to contract management and is a vital mechanism to respond and contribute to these challenges. Early engagement with suppliers at the pre-procurement stage is essential to maximise sustainability outcomes.

The Council's Sustainability Procurement Policy sets out the guiding principles for achieving sustainable procurement across all activities.

3.5 Supporting Local SMEs

Following changes introduced by new legislation, the Procurement Team may reserve below-threshold contracts for suppliers based within the local area.

For this purpose, the local area is defined as:

- a. The area in which the authority is situated (e.g. West Oxfordshire or Oxfordshire).
- b. The authority's area and any neighbouring local authority areas.

The Procurement Team will support Officers to make use of this provision where appropriate.

To further maximise this opportunity, the Contract Procedure Rules have been updated to require Officers to obtain at least one quotation from a local supplier for all requirements valued below £30,000, where suitable local suppliers are available.

3.6 Modern Slavery

The Modern Slavery Act 2015 defines modern slavery as encompassing human trafficking and all forms of exploitation involving slavery and forced or compulsory labour.

The means: coercive behaviour

The purpose: exploitation.

In the context of UK Public Procurement, the type of modern slavery in the UK that requires attention is labour exploitation where victims are forced to work for offenders, often under paid or not all.

We are committed to ensuring the suppliers with whom we do business understand the risks of modern slavery in supply chain and take appropriate action to identify and address those risks, with particular focus on supporting victims of modern slavery.

Modern slavery risks will be addressed during the procurement process: -

- When identifying the need, approach to be taken and the market – commissioning/pre procurement stage
- When deciding the requirement – specification stage
- When selecting suppliers to invite to tender - selection stage
- When awarding contract -award stage. As part of the award stage, the Procurement team will consult with the Debarment Review Service (DRS) which was established following the passing of the Procurement Act 2023. The DRS' purpose is to protect public procurement from suppliers that pose risk, by carrying out an investigatory process to consider whether suppliers should be entered onto a centralised debarment list under the powers of the Procurement Act 2023.
- In the performance of the contract – contract conditions and contract management.

3.7 Social Value

The Public Services (Social Value) Act 2012 places an obligation on the Council to consider economic, social and environmental wellbeing within any procurement for public service contracts above the relevant Public Contract Regulation threshold. The Council endeavours to not only meet the legal requirements, but exceed them, through consideration of Social Value within all procurement activity.

Delivery of Social Value is intrinsically linked to commissioning which assists with innovation, creating savings and social outcomes. There has never been a more influential time to bring Social Value to the front and centre focus of project delivery; commissioning, procurement and contract management all have an intrinsic part to play in ensuring support and development of the local communities and environment the Council serves.

The Procurement Team will

- Continue to build its confidence to explore the social, economic and environmental impacts that can deliver and support the Council's aspirations for carbon neutrality and a sustainable future.
- Work to upskill SMEs, VCSEs and local suppliers to turn their social, economic, and environmental ambitions into practical actions.
- Contribute to the Council's Modern Slavery statement and ensure procurement and contracting activity monitors this area.

3.8 Fraud and Corruption

Publica are committed to supporting its partners countering fraud and corruption and officers who procure goods, services and works must be fully aware of the rules and support this aim.

Successful counter fraud and anti-corruption arrangements should be a consequence of effective business systems, governance practices and controls, specifically the:

- Contract Procedure Rules
- Financial Rules
- Whistleblowing Policy
- Employee's Code of Conduct or Business Conduct Policy, and
- Counter Fraud and Anti-Corruption Policy and Fraud Response Plan.

To support and create further awareness the Procurement team will ensure that the Counter Fraud and Enforcement team are involved in all Officer Procurement Training.

Please see Appendix 1.

3.9 Data Protection

The Data Protection Legislation consists of the UK General Data Protection Regulations (UK GDPR), the Data Protection Act 2018 (DPA 2018) (and regulations made thereunder) and the Privacy and Electronic Communications Regulations 2003 (SI 2003/2426).

Article 28 of the Data Protection Legislation adds a requirement upon controllers (the organisation who determines the purposes and manner in which personal data is processed) to ensure that certain provisions are included in contracts where there is personal data being passed from one party as the controller, to another acting as a processor, of that personal data.

The aim of the Article is to ensure that a controller of data who passes personal data to the processor controls how that processor can use that data. To achieve this, the Article stipulates that any processing of personal data by a processor shall be governed by a contract containing certain Information to ensure compliance, security and accountability.

Procurement will therefore ensure that Data Protection Legislation is addressed where required at each stage of a regulated procurement and recorded appropriately on the Contract register by:

- Ensuring that the processor provides sufficient guarantees to implement technical and organisational measures to protect personal data and comply with UK GDPR
- Mandatory Contract Terms: Processing must be governed by a Data Processing Agreement (DPA) or other legal act specifying: to include:
 - Subject matter and duration of processing
 - Nature and purpose of processing
 - Types of personal data and categories of data subjects
 - Obligations and rights of the controller
 - Processor duties including security measures, confidentiality, and compliance with instructions
 - Sub-processor arrangements
 - Data deletion or return procedures at the end of the contract
 - Audit and inspection rights for the controller

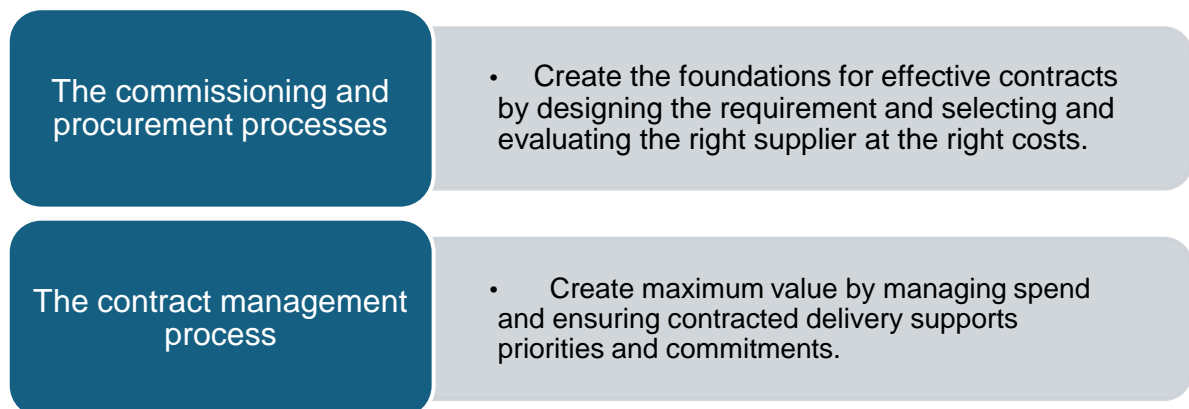
4. Contract Management

Contract Management is the process of systematically and efficiently managing contract development, contract entry, contract delivery and contract exit.

Good contract management:

- Ensures the contract is delivered for the purpose it was intended, at agreed levels, timescales and costs.
- Effectively measures contract compliance and performance in a continuous way.
- Supports an effective working relationship between all parties to the contract.
- Reduces the risk of disputes and litigation, which can be costly and cause reputational damage.
- Provides clear mechanisms for managing change.
- Ensures accurate and relevant reporting and monitoring.
- Fulfils all parties' contractual obligations.

Contract management sits within a wider commercial lifecycle that includes commissioning and procurement. All three are really important functions to ensure the council is compliant with legislation and achieving value for money in spending decisions.



Our aim is to deliver efficiencies, savings and service quality improvements through an assertive, proactive, consistent approach to supplier relationship and contract management.

This will include the management of risks such as contract management capability, supplier performance, changes in requirements, and stakeholder relationships. Where appropriate contract management plans will be utilised to ensure that value is created throughout life of the contract.

Contract management responsibilities include:

- Maintaining comprehensive contracts register
- Ensuring contracts align with the objectives of the Council and offer value
 - Ensuring contractual obligations are met by both parties
 - Managing contracts throughout their lifecycle, including variations and extensions.

Contracts will be managed by individual services within the Council or Publica who need the contract to support their service delivery. For the avoidance of doubt, the Procurement team are not responsible for managing contracts.

The Procurement Team will:

- Provide targeted, short-term support to Contract Managers across the Council who may need some advice, guidance, or short-term practical support to manage a contract.
- Contribute towards creating and embedding best practice whilst maintaining a culture of high standards in the performance of contract management functions across the Council.
- Segment contracts in relation to spend and criticality to the Council and work with service-based contract managers to assess and baseline contract management activities against best practice for strategic contracts.
- Work with internal audit to identify shortfalls and create improvement plans to close contract management gaps.
- To support the Council, the Procurement team will design targeted training and support for contract managers, ensuring they have the knowledge, skills and tools to manage their contracts.
- Complete the Contract Management Foundation training on the Government Commercial College and, where appropriate, the Contract Management Practitioners training to upskill staff.
- Continue to work with the Government Commercial Function, Contract Management Pioneer Programme to review our practices and embed an improved contract management culture.

5. What is next

Since adoption of the previous Procurement and Contract Management Strategy, the Procurement team has delivered significant change to align with the most substantial reform to public sector procurement since 2015. This has been achieved while continuing to maintain effective delivery of business-as-usual procurement and contract management services across the organisation.

Over the lifetime of this strategy, the primary focus will shift towards supporting Local Government Reorganisation (LGR). This will ensure that West Oxfordshire District Council is well positioned to transition into the new Unitary Authority model and to fully leverage the opportunities presented by reorganisation. Throughout this period, the Procurement team will continue to ensure that statutory, operational, and commercial business as usual requirements are maintained.

Appendix I - Fraud Awareness



WEST OXFORDSHIRE
DISTRICT COUNCIL

The Council has a duty to prevent fraud and corruption, whether it is attempted by someone outside or within the Council such as another organisation, a resident, an employee or Member. Fraud can occur at all stages of the procurement cycle and can be internal, external or both where there is collusion. Officers must be aware of the risks and the fact that they apply not just to large, high value contracts but also to low level spend. Officers engaged in all stages of the process need to be alert to the possibility of abuse when raising or approving requisitions, when writing or evaluating specifications, as well as further on in the process once the contract has been awarded.

ECONOMIC CRIME AND CORPORATE TRANSPARENCY ACT 2023 (ECCTA)

ECCTA created a failure to prevent fraud offence. Guidance makes clear that under the offence, an organisation may be “criminally liable where an employee, agent, subsidiary, or other ‘associated person’, commits a fraud intending to benefit the organisation and the organisation did not have reasonable fraud prevention procedures in place.”

If liable, penalties could include unlimited fines and other severe commercial and operational consequences. The Council falls within the definition of an organisation impacted by the new offence. The Council will be able to avoid criminal liability for failing to prevent fraud where it can prove that it had “reasonable” fraud prevention procedures in place at the time of the alleged fraud (or that it was reasonable not to have such procedures in place). It is therefore everyone’s responsibility to ensure probity and transparency in any of the Council’s areas of work, but procurement is a high-risk area where fraud and an offence under ECCTA is more probable.

To manage the risk of bribery and corruption, procedures for declaring gifts and hospitality and conflicts of interest are also mandatory and the organisation encourages a culture of transparency that is supportive of whistleblowing.

Fraud awareness and training for all staff involved in the procurement process is mandatory and includes training on the fraud indicators officers must be alert to.

The table below gives examples of common indicators of fraud in the procurement cycle and how to mitigate the risks. For more information on procurement fraud risks and how to prevent and mitigate please see the Procurement fraud risk register and Procurement fraud toolkit.


Procurement cycle	Red Flags	Controls
Pre Tender - Collusion among contractors	Evidence or suggestion of a close relationship between bidding organisations	Joined up working across the organisation/different teams.
	Limited competition in the sector – Increases the chances that suppliers can manipulate contract value	Training on procurement processes and potential fraud.
	Same contractors bid for each job – may indicate price fixing	Centralised contracts register that is regularly reviewed.
	Certain contractors don't bid (unexpected) – may be a pre-agreement between contractors	Strong controls around sub-contracting
	Suspiciously high bids or bids from fake companies to give the appearance of competition	Due diligence to establish legitimacy of suppliers/bids
	Pattern to winning/losing contracts	
Collusion amongst bidders distorts true competition and reduces public confidence in the procurement process achieving value for money.		
Pre Tender - Collusion between procurer and bidder	Officer overseeing the award of contract has a relationship with successful contractor – conflict of interest	Maintaining and monitoring Register of Interests and Gifts & Hospitality register.
	Contractor provides gifts or rewards – Bribery	Improving the culture of compliance with financial regulations/OJEU requirements/procurement processes
	Contract specification changes after award of contract – could indicate collusion and malpractice against losing bidders	Training on procurement fraud and the Bribery Act

	<p>One officer specifically deals with a particular supplier - collusion</p> <p>Supplier wins multiple bids – insider information</p> <p>Contract awarded to unknown/surprising contractor – bid manipulation</p> <p>Favouring getting procurement done quickly over following due process – bid manipulation/corruption</p>	<p>Segregation of duties/rotation of employees</p> <p>Due diligence to establish legitimacy of suppliers/bids</p>
Procurement - pre-tender	<p>Lack of needs assessment and lack of evidence around decision making process – could be collusion</p> <p>Altering timing or need – to suit one specific supplier</p> <p>Multiple procurement for same goods/services – splitting contracts to circumvent approval and tender thresholds</p> <p>Narrow or vague tenders – to suit one supplier</p> <p>Abuse of waivers – to circumvent approval process</p> <p>Lack of due diligence on suppliers – financial risk</p>	<p>Training on procurement processes</p> <p>Regular audit and reviews of paperwork</p> <p>Spend analysis to identify large/above approval threshold spends when aggregated.</p> <p>Tender evaluation framework agreed at planning stage</p>
Tendering/Bid evaluation - Bid manipulation	<p>Limiting the reach/scope or duration of adverts for tenders – procurer may have a bidder in mind and wants to restrict the number of bidders; Altering bids/timetables; Accepting late bids; Limited bids; Fictitious companies; Sharing</p>	<p>Training on fraud awareness and the procurement process</p> <p>Audit on bid security and sensitive tender documentation</p> <p>Audit on patterns of contract award</p>

	<p>info; Manipulating scoring; Falsified documents; High/ similar prices; Same suppliers and patterns; Prices close to estimates</p>	
	Altering bids or timetables- to favour one bidder	
	Limited number of bids/contractors do not bid – collusion between bidders	
	Providing different information to different bidders – unfair advantage to one	
	Manipulation of bid scoring and evaluation – procurement fraud	
	Contractor providing false documentation – fraud	
	Collusion between bidders to 'share' the awards on a rota.	
Post-Tender - Contract Management	No assessments of work prior to invoice payment – inadequate valuation & inspection of work/deliverables	Effective contract management & monitoring Internal audit review of contracts including checking goods/services received.
	Contract variations, sub- standard delivery	Proactive monitoring of spend.
	Duplicate invoicing or vague and non-specific invoicing – fraudulent charging	Appropriate authorisation limits Segregation of duties
	Contractor performing below expectations - underperformance not acted on	Effective budget monitoring Contract variations approved at an appropriate level
Inferior product substitution/services not delivered to standard results in poor value money and risk to the Council.		

Contract Management - Payments	Same person raises and approves payments – conflict of interest	Promoting an open culture and an effective Whistleblowing policy
	Increasing amounts paid in expenses/large payments to an individual – abuse of system	Segregation of duties and duplicate payment controls
	Transactions at odd times/odd frequencies/unusual amounts/unexpected recipients. Discrepancies in accounting records/unexplained items	Maintaining and monitoring Register of Interests and Gifts & Hospitality register. Internal review of controls and processes A message of zero tolerance of fraud
	Internal controls that are not enforced/or are bypassed	
	VAT paid on invoices without VAT number	
	Missing documents/records not complete	
	Employees unwilling to share duties/take leave or who work long hours on their own	
	Large number of small payments to one supplier	
Some areas of public sector business are at risk of penetration by Serious and Organised Crime Groups – risk of money laundering and fraud.		
Contract management - Processes	One employee controls process – no segregation of duties	Effective audits Effective Reconciliation processes
	Little or no supervision	Segregation of duties
	Deliberate manipulation of accounting records/missing files	Due diligence by the procurement team

	Lack of verification or validation checks within the process	
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 WEST OXFORDSHIRE DISTRICT COUNCIL	WEST OXFORDSHIRE DISTRICT COUNCIL
Name and Date of Committee	EXECUTIVE – 10 JUNE 2026 COUNCIL – 22 JULY 2026
Subject	APPOINTMENTS TO OUTSIDE BODIES
Wards Affected	All
Accountable Member	Councillor Andy Graham – Leader of the Council. Email: andy.graham@westoxon.gov.uk
Accountable Officer	Andrea McCaskie, Director of Governance and Regulatory Services Email: andrea.mccaskie@westoxon.gov.uk
Report Author	Ana Prelici – Senior Democratic Services Officer Email: ana.prelici@westoxon.gov.uk
Purpose	To provide a list of appointments to Outside Bodies for the civic year 2026/27.
Annexes	Annex A – Appointments to Outside Bodies
Recommendation	That the Executive resolves to: <ol style="list-style-type: none"> 1. Note the appointments to outside bodies as set out in Annex A; 2. Recommend to Council to note the appointments to outside bodies as set out in Annex A;
Corporate Priorities	<ul style="list-style-type: none"> • Putting Residents First • Working Together for West Oxfordshire
Key Decision	NO
Exempt	NO
Consultees	Head of Democratic and Electoral Services

1. EXECUTIVE SUMMARY AND BACKGROUND

- 1.1 This report sets out the appointments to outside bodies for the 2026/27 civic year.
- 1.2 Appointments to most outside bodies are a responsibility of the Leader of the Council, who makes such appointments annually following the Annual Council meeting.
- 1.3 The appointments for 2026/27 have been confirmed by the Leader and are included in Annex A to this report. Executive and Council are asked to note the report.

2. MAIN POINTS

- 2.1 Members may be appointed to a wide range of outside bodies. Most appointments are made by the Leader. Members may also be appointed directly by the outside body itself to serve in a private capacity (for instance as a member of the community) rather than as an elected member of the Council, or they may be serving as a member of that body before being elected as a Councillor.
- 2.2 Many of the appointments reflect specific Executive responsibilities so it may be the wish of the Leader to appoint to these in accordance with Executive roles.
- 2.3 Each year the Council is invited to make one non-executive appointment to an outside body. This is to one seat on the Oxfordshire Joint Health Overview and Scrutiny Committee and was appointed at the Annual Council meeting.
- 2.4 The Council has produced guidance for Members who are appointed to outside bodies. This includes guidance on Members' responsibilities on different types of outside bodies, dealing with interests, and issues of bias and predetermination. The guidance will be circulated to the Members appointed to outside bodies.

3. ALTERNATIVE OPTIONS

- 3.1 The Leader is free to make such appointments as they consider appropriate in respect of executive functions.

4. FINANCIAL IMPLICATIONS

- 4.1 Travel and subsistence allowances will be payable in respect of the majority of appointments made, if claimed. Provision for this is included in the Council's budget.

5. LEGAL IMPLICATIONS

- 5.1 The Council's Constitution (Part 3C) includes the following as a responsibility of full Council:

To appoint or nominate individuals to outside bodies in respect of non-Executive Functions and revoke or withdraw such appointment or nomination where there is no Group Leader consensus on the decision to be taken. To note the Leader's appointments to outside bodies in respect of Executive Functions, as advised.

5.2 Legal implications for Members appointed to outside bodies are covered in the guidance document. For example, any Member appointed as a director of a company will owe a fiduciary duty to the company.

6. RISK ASSESSMENT

6.1 Guidance has been produced for Members who are appointed to serve on outside bodies by outlining their responsibilities and obligations in that role. The guidance does not attempt to provide definitive answers to every particular set of circumstances but rather to provide a framework against which Members can exercise judgement when faced with potential conflicts.

7. EQUALITIES IMPACT

7.1 None.

8. CLIMATE AND ECOLOGICAL EMERGENCIES IMPLICATIONS

8.1 There may be climate change implications arising from car travel to meetings of the outside bodies.

9. BACKGROUND PAPERS

None.

(END)

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Outside Bodies Appointments

Appointment by office

Outside Body	Number of reps	Reps 2025/26	Reps 2026/27
LGA General Assembly	1	Andy Graham Sub: Duncan Enright	Andy Graham Sub: Duncan Enright
Oxfordshire Environment Partnership	1	Andy Graham Sub: Duncan Enright	Andy Graham Sub: Duncan Enright
Oxfordshire Leaders Group	1	Andy Graham Sub: Duncan Enright	Andy Graham Sub: Duncan Enright
Oxfordshire Partnership Board	1	Andy Graham Sub: Duncan Enright	Andy Graham Sub: Duncan Enright
South East England Councils (SEEC)	1	Andy Graham Sub: Duncan Enright	Andy Graham Sub: Duncan Enright
West Oxfordshire Local Advisory Board (GLL Better) (Appointment by Office)	1	Tim Sumner	Tim Sumner
South West Audit Partnership Board - Member Representative	1	Carl Rylett	Nigel Ridpath

Appointments by Leader

Outside Body	Number of reps	Reps 2025/26	Reps 2026/27
Burford School Foundation	1	Andrew Beaney	Nick Field-Johnson
Burford Traffic Advisory Committee	2	Hugo Ashton* 1 x vacancy	Rosie Pearson Andrew Beaney
Charlbury Conservation Area Advisory Committee	2	Andy Graham Liz Leffman	Andy Graham Liz Leffman
Chipping Norton Theatre – Council of Management	1	Mike Baggaley*	Sandra Coleman

Chipping Norton Traffic Advisory Committee	2	Geoff Saul Mike Baggaley	Geoff Saul Sandra Coleman
Cotswold National Landscape	1	Rosie Pearson	Rosie Pearson
Oxfordshire Association of Local Councils	1	Joy Aitman	Jan Lund
Oxfordshire Food Network	1	Rachel Crouch	Sandra Coleman
Oxfordshire Health and Wellbeing Board	1	Rachel Crouch	Rachel Crouch
Oxfordshire Health Improvement Board	1	Rachel Crouch	Rachel Crouch
Oxfordshire Joint Health Overview and Scrutiny Committee	1	Elizabeth Poskitt	Elizabeth Poskitt
PATROL Parking and Traffic Regulations Outside London Joint Committee	1	Lidia Arciszewska	Alistair Wray
Thames Valley Police and Crime Panel	1	Geoff Saul	Geoff Saul
Traffic Penalty Tribunal Joint Committee	1	Alaric Smith	Alaric Smith
Volunteer Link-Up	1	David Melvin	David Melvin
West Oxfordshire Community Safety Partnership	2	Sandra Simpson Geoff Saul	Sandra Simpson Geoff Saul
Witney Educational Foundation (4 year term of office as Trustee)	1	Duncan Enright	Duncan Enright
Witney Traffic Advisory Committee	2	Mike Brooker Andrew Prosser	Stuart McCarroll Andrew Prosser
Oxford Airport Consultative Committee	2	Tim Sumner	Tim Sumner Hannah Massie
Oxfordshire Buildings Trust	1	Elizabeth Poskitt	Elizabeth Poskitt
Woodstock Traffic Advisory Committee	2	Julian Cooper* Elizabeth Poskitt	Hannah Massie Elizabeth Poskitt
World Heritage UK	1	Steve Cosier	Steve Cosier