

Notice of Overview and Scrutiny Board

Date: Monday, 12 May 2025 at 6.00 pm

Venue: HMS Phoebe, BCP Civic Centre, Bournemouth BH2 6DY



Membership:

Chairman:

To be elected

Vice Chairman:

To be elected

The Membership of the Overview and Scrutiny Board is to be appointed at the full Council meeting on 6 May 2025.

All Members of the Overview and Scrutiny Board are summoned to attend this meeting to consider the items of business set out on the agenda below.

The press and public are welcome to view the live stream of this meeting at the following link:

<https://democracy.bcpccouncil.gov.uk/ieListDocuments.aspx?MIId=5955>

If you would like any further information on the items to be considered at the meeting please contact: Claire Johnston or email democratic.services@bcpcouncil.gov.uk

Press enquiries should be directed to the Press Office: Tel: 01202 454668 or email press.office@bcpcouncil.gov.uk

This notice and all the papers mentioned within it are available at democracy.bcpccouncil.gov.uk

GRAHAM FARRANT
CHIEF EXECUTIVE

1 May 2025

**DEBATE
NOT HATE**



Available online and
on the Mod.gov app



Maintaining and promoting high standards of conduct

Declaring interests at meetings

Familiarise yourself with the Councillor Code of Conduct which can be found in Part 6 of the Council's Constitution.

Before the meeting, read the agenda and reports to see if the matters to be discussed at the meeting concern your interests



What are the principles of bias and pre-determination and how do they affect my participation in the meeting?

Bias and predetermination are common law concepts. If they affect you, your participation in the meeting may call into question the decision arrived at on the item.

Bias Test

In all the circumstances, would it lead a fair minded and informed observer to conclude that there was a real possibility or a real danger that the decision maker was biased?

Predetermination Test

At the time of making the decision, did the decision maker have a closed mind?

If a councillor appears to be biased or to have predetermined their decision, they must NOT participate in the meeting.

For more information or advice please contact the Monitoring Officer
(janie.berry@bcpcouncil.gov.uk)

Selflessness

Councillors should act solely in terms of the public interest

Integrity

Councillors must avoid placing themselves under any obligation to people or organisations that might try inappropriately to influence them in their work. They should not act or take decisions in order to gain financial or other material benefits for themselves, their family, or their friends. They must declare and resolve any interests and relationships

Objectivity

Councillors must act and take decisions impartially, fairly and on merit, using the best evidence and without discrimination or bias

Accountability

Councillors are accountable to the public for their decisions and actions and must submit themselves to the scrutiny necessary to ensure this

Openness

Councillors should act and take decisions in an open and transparent manner. Information should not be withheld from the public unless there are clear and lawful reasons for so doing

Honesty & Integrity

Councillors should act with honesty and integrity and should not place themselves in situations where their honesty and integrity may be questioned

Leadership

Councillors should exhibit these principles in their own behaviour. They should actively promote and robustly support the principles and be willing to challenge poor behaviour wherever it occurs

AGENDA

Items to be considered while the meeting is open to the public

1. Apologies

To receive any apologies for absence from Councillors.

2. Substitute Members

To receive information on any changes in the membership of the Committee.

Note – When a member of a Committee is unable to attend a meeting of a Committee or Sub-Committee, the relevant Political Group Leader (or their nominated representative) may, by notice to the Monitoring Officer (or their nominated representative) prior to the meeting, appoint a substitute member from within the same Political Group. The contact details on the front of this agenda should be used for notifications.

3. Election of Chair

To elect the Chair of the Overview and Scrutiny Board for the 2025/26 municipal year.

4. Election of Vice-Chair

To elect the Vice-Chair for the Overview and Scrutiny Committee for the 2025/26 municipal year.

5. Declarations of Interests

Councillors are requested to declare any interests on items included in this agenda. Please refer to the workflow on the preceding page for guidance.

Declarations received will be reported at the meeting.

6. Confirmation of Minutes

To confirm and sign as a correct record the minutes of the Meeting held on 4 March 2025.

7 - 18

6a. Action Sheet

To consider any outstanding actions from previous meetings.

19 - 22

7. Information Considered Between Meetings

The following items were considered by the Board since the last meeting:

- [Corporate Performance Report – Quarter 3](#)

8. Public Issues

To receive any public questions, statements or petitions submitted in accordance with the Constitution. Further information on the requirements

for submitting these is available to view at the following link:-

<https://democracy.bcpCouncil.gov.uk/ieListMeetings.aspx?CommitteeID=151&Info=1&bcr=1>

The deadline for the submission of public questions is midday 3 clear working days before the meeting – Tuesday 6 May 2025.

The deadline for the submission of a statement is midday the working day before the meeting – Friday 9 May 2025.

The deadline for the submission of a petition is 10 working days before the meeting.

ITEMS OF BUSINESS

9. BCP Complaints Policy	23 - 64
<p>An effective complaints process demonstrates commitment to accountability, fosters trust amongst customers and stakeholders, and provides a structured way to address concerns appropriately and promptly. Recent revisions to the Local Government Ombudsman Complaint Handling Code have introduced changes designed to enhance the efficiency, transparency and responsiveness of local authorities in handling complaints. These modifications affect the operations and policies of all UK local authorities.</p> <p>The BCP Council Complaints Policy has been updated and additionally, a separate new policy has also been prepared regarding Unreasonable Actions, as also recommended by the Local Government Ombudsman.</p>	
10. Blue Badge Update	65 - 70
<p>This report provides an update on the recommended actions made in relation to the Informal working group report update submitted to Corporate and Community Overview and Scrutiny Committee on 21 October 2024.</p>	
11. Arts and Culture Funding	71 - 80
<p>This provides information on the Arts Council England National Portfolio Organisations which BCP Council supports. The report provides information on their funding, objectives and details the important link between culture, health and wellbeing in line with the corporate strategy.</p>	
12. Medium Term Financial Plan (MTFP) Update	81 - 108
<p>This report:</p> <ul style="list-style-type: none">• Presents an update on Local Government Funding Reforms and the government Spring Statement.• Aims to ensure the council presents a legally balanced 2026/27 budget.• Proposes a budget planning process and timeline for key financial reports. <p>Proposes a financial strategy to support the delivery of a robust and financially sustainable budget for 2026/27.</p>	

13. Work Plan

109 - 122

The Overview and Scrutiny (O&S) Committee is asked to consider and identify work priorities for publication in a Work Plan.

No other items of business can be considered unless the Chairman decides the matter is urgent for reasons that must be specified and recorded in the Minutes.

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BOURNEMOUTH, CHRISTCHURCH AND POOLE COUNCIL
OVERVIEW AND SCRUTINY BOARD

Minutes of the Meeting held on 04 March 2025 at 6.00 pm

Present:-

Cllr S Bartlett – Chairman

Cllr S Aitkenhead – Vice-Chairman

Present: Cllr P Broadhead, Cllr J Beesley, Cllr L Dedman, Cllr C Goodall,
Cllr S Mackrow, Cllr L Northover, Cllr K Salmon, Cllr T Trent,
Cllr O Walters, Cllr C Weight and Cllr M Howell (In place of Cllr Dr F
Rice)

Also in attendance: Cllr M Earl, Cllr P Canavan, Cllr E Harman, Cllr K Rampton, Cllr C
Adams, Cllr T Slade, Cllr M Cox, Cllr K Adam, Cllr J Hanna, Cllr D
d’Orton-Gibson, Cllr S Carr-Brown, Cllr J Martin and Cllr A Hadley

109. Apologies

Apologies were received from Cllr F Rice

110. Substitute Members

Cllr M Howell substituted for Cllr F Rice

111. Declarations of Interests

In relation to agenda item 7 – Bournemouth Development Company LLP Business Plan, Cllr M Howell advised that he wished to continue as a Board member of BDC but there had been some confusion around this issue, and he was unsure of his current status. The Chair advised that as far as the Council was now concerned he had resigned and therefore this was not an issue for this meeting. However, it was confirmed prior to consideration of this item that the resignation did not stand and he would remain as a Board member and he therefore declared this for the purpose of transparency.

Cllr d’Orton-Gibson also advised that he was a Board member of the Bournemouth Development Company

112. Confirmation of Minutes

The minutes of the meeting held on 3 February were approved as a correct record.

113. Action Sheet

The following actions were addressed.

114. Public Issues

There were no Public Statements or petitions. There were three public questions received from Mr McKinstry. These were responded to by the Lead Member of the Task and Finish Group as outlined below:

Question 1

For the historical record more than anything, can we be told which ten councillors were on the cross-party task and finish group which considered the community governance submissions; and what were the dates of their six meetings?

The Task and Finish Group was politically proportionate with each political group appointing their representatives. The membership of the Task and Finish Group was initially Councillor Walters (Chair), Councillor Aitkenhead (Vice-Chair) plus Councillors Broadhead, Bull, Dedman, Dove, Hanna, Le Poidevin, Rice and Trent. On 12 February 2025, Councillor Broadhead resigned from the Task and Finish Group and was replaced with Councillor Beesley.

The Task and Finish Group met on the following dates:

Friday, 31 January, Tuesday 4 February, Friday 7 February, Wednesday 12 February, Friday 14 February and Friday 21 February 2025.

Question 2

Why were councillors given such a short time frame to respond to the email of 7 February 2025 which sought their views on this matter? (The responses cite a deadline of 11 February, and this meeting wasn't until 4 March, so I can't see why they weren't given an extra week at least - given the complexity of the subject, plus their unique stance as ward representatives and charter trustees.) It would also be good to know why councillors' views were solicited so late in the day, whereas the response from Tom Hayes MP - dated 2 December 2024 - suggests MPs were communicated with back in November / early December.

BCP Councillors were emailed on 7 November 2024. This email outlined the project timetable for the stage 1 exercise, the dates of the initial submissions period and that the initial stage was open to any interested party to respond. The email included dates of the planned public briefings and details of an all-Councillor Briefing session which was held on 14 November. This communication was sent on the same date as the communication to local Members of Parliament. A number of councillors made representations during the initial submission period.

The agreed timetable for the Task and Finish Group to finalise the draft recommendations was as follows:

- Friday 14 February – Deadline to agree all draft recommendations to allow drafting of the report
- Friday 21 February – Sign-off content of final report
- Monday 24 February – Release report for inclusion on agenda

Question 3

Finally, why were councillors not allowed to make face-to-face representations to the task and finish group - as indicated in a reply to the 7 February email, reprinted on page 536 of tonight's supplementary papers?

The Task and Finish Group had initially intended to invite all councillors to attend a meeting to explain the submissions for their respective ward areas and seek feedback. However, the Task and Finish Group were advised that a number of councillors were unable to attend and had indicated that they would prefer to receive details of the submissions received and to have the opportunity to potentially make a short written representation to the Task and Finish Group. The Task and Finish Group agreed to this request.

115. Community Governance Review - Draft Recommendations

The Lead Member of the Task and Finish Group presented a report, a copy of which had been circulated to each Member and a copy of which appears as Appendix 'A' to these Minutes in the Minute Book. The Board was informed that the Local Government and Public Involvement in Health Act 2007 (Part 4) devolved power from the Secretary of State to principal councils to carry out community governance reviews and put in place or make changes to local community governance arrangements. The Council commenced a review following the Council decision in October 2024 at which the terms of reference and timetable were approved. Cabinet would be asked to consider the draft recommendations of the Task and Finish Group and to make a recommendation to Council. The Lead Member explained the rationale behind some of the recommendations outlined in the report which may be viewed as by some as contentious. The Board considered the recommendations for each of the Parishes outlined in the report by areas across the conurbation.

Christchurch Area - There was support from both Ward Councillors and Board Members for all of the recommendations outlined in the report in relation to the Christchurch Area Town and Parish Councils which were broadly in line with the current Councils.

1. RESOLVED that the O&S Board Recommend to Cabinet that the draft recommendations of the Task and Finish Group relating to proposals for Burton and Winkton (A), Hurn (B), Highcliffe & Walkford (C) and Christchurch Town (D) be recommended to Council, for approval for publication and consultation, without amendment.

Voting: Unanimous

Poole Area – Ward Councillor spoke in opposition to the consultation, due to the additional layer of bureaucracy and additional Council Tax precept and the confusion that arises from this consultation. It was noted that the Charter Trustee system could work better if improved. Conversely others noted that in reality there were lots of things which the Council was unable to provide, and there may be services and buildings which would not be

able to be supported in the future. These issues would be able to be addressed by a Town Council and it was welcomed that it was a larger size Town Council which would be democratically accountable.

The Board reflected that the heritage of the three distinct towns was important. It was felt that it was important that Poole was its own distinct entity and areas where there is a Town Council have a better sense of identity and therefore it should go out for further consultation.

Concerns were raised regarding submissions which covered areas such as Hamworthy and Canford Cliffs which were dismissed by the working group in favour of a greater Poole Town Council area. Poole proposals received were for the whole of Poole including those areas which were now removed such as Broadstone. There were concerns raised in the way in which the working group operated in suggesting new areas. However, it was confirmed that the working group could put forward these as recommendations. It was noted that this was a starting point and there was a need to proceed with this process. It was suggested that those in areas around the edge of Poole may not feel the same loss of identity that some more central areas did but there did appear to be a strong drive within central Poole for a Town Council.

The issues around the demand expectations from the public, and the current Council Tax burden were highlighted.

2. RESOLVED that the O&S Board recommend to Cabinet that the draft recommendations of the Task and Finish Group relating to Broadstone (F) and Poole Town (J) be recommended to Council, for approval for publication and consultation, without amendment.

Voting: 11 in favour, 2 against

Bournemouth Area - The Chair advised that Bournemouth area proposals would be taken for discussion collectively across Bournemouth but that there may need to be a vote on each area separately.

A ward member advised that parishing did not appear to be necessary for the Bournemouth area and suggested that all recommendations for Bournemouth be rejected. It was felt that there was no appetite in Bournemouth for parishes and that there would unintended consequences to having a consultation on them. It was suggested that the starting point should be to 'do nothing' but that the working group process seemed to have moved beyond this. It was suggested that parishes introduce false boundaries and unnecessary conflict, reducing community cohesion.

Members commented that there was not enough support for this within the Bournemouth area and the current process felt directed from BCP Council rather than community supported. It was suggested that the creation of Parish Councils would fulfil services which were currently being provided by BCP but which were under threat due to the current financial situation.

It was suggested that the proposals indicated a failure in the Local Government Reorganisation process with services being cut down to minimal levels. It was noted that the overriding concern was to ensure that the public had a say in the proposals and it was confirmed that even if the proposals for Bournemouth were changed it would not save any money as this would still need to be consulted on.

Board members noted that there was no submission which suggested a 'rest of Bournemouth' Town Council and that there appeared to be strong feelings that there wasn't a desire for town/parish councils in other areas of Bournemouth. Further concerns were raised regarding the additional precepts which would be incurred by parishing different areas. It was hoped that any communications circulated to residents would have greater engagement across political parties/groups. Concerns were raised regarding the mayoralty and the way in which this may be eroded by the proposals.

It was suggested that there may also be impacts if some areas of Bournemouth became parish councils but not all and may lead to some areas wanting a Town or Parish Council later on. It was clarified that different Parish Councils may be put forward following the consultation process and there would still be an opportunity after formation of the Parish Councils for certain areas to put forward proposals for a different parish area.

The Lead member of the Task and Finish Group advised that they could only put forward positive recommendations and the residents of BCP should be consulted on the recommendations. However there could be no recommendations made at all. It was felt that the Council did not have a strong record on responding to consultations and it was therefore more appropriate to not put a proposal forward that wasn't based on a suggestion received.

3. RESOLVED that the Board recommend to Cabinet that that the recommendation for Bournemouth (K) not be forwarded to Council.

Voting: 6 in favour 5 against, 2 abstentions

- The meeting adjourned between 7:54pm and 8:04pm -

The Board discussed the proposals for the separate parish Councils within the Bournemouth area, the current proposals to draw a boundary between Southbourne, Boscombe and Pokesdown. A Ward Councillor suggested that there were no positive benefits for drawing up division between areas. These were dense residential areas where the communities blended into each other. The Guidance suggests that the boundaries between the areas should be easily identifiable, and this was not the case within the Southbourne/Boscombe/Pokesdown areas.

It was noted that the boarder between Southbourne and Boscombe was potentially an issue as there was not a clearly defined division and many residents would not be able to identify a specific boarder. It was felt that it was important to keep a commercial area within the suggested Parish. Others commented that the proposed Southbourne Community Council was a well thought up proposal.

It was moved and seconded to recommend to Cabinet to not put the Southbourne area forward for consultation. The vote on this was put and lost.

Voting: 4 in favour, 7 against, 2 abstentions

4. It was then RESOLVED that the O&S Board recommend to Cabinet that the draft recommendations of the Task and Finish Group relating to Southbourne (I) be recommended to Council, for approval for publication and consultation, without amendment.

Voting: 7 in favour, 4 against, 2 abstentions

The Board went on to discuss the proposals for Boscombe. A ward Councillor advised that none of the four Ward Councillor for the Boscombe area were in support of a parish council for this area.

A Ward Councillor supported the removal of a part of polling district EC1 from the proposal. It was suggested that there was no evidence that people within the area wanted this parish and it was suggested that momentum could take this forward without this really being desired by the residents of the area. Board members commented that there were proposals put forward for these areas and therefore these submissions should be reflected in the consultation process which was taken forward.

RESOLVED that the O&S Board recommend to Cabinet that the draft recommendations of the Task and Finish Group relating to Boscombe and Pokesdown (H) be recommended to Council, for approval for publication and consultation, without amendment.

Voting: 9 in favour 4 against

Note: An amendment to this recommendation was put and lost to remove that the section of EC1 polling district from the proposed boundary of the parish. It was noted that this was part of the original community submission.

Voting: 4 in favour, 9 against

The Board was advised that there were no proposed changes to the existing Throop and Holdenhurst Parish Council.

RESOVLED that the O&S Board recommend to Cabinet that the draft recommendations of the Task and Finish Group relating to Throop

and Holdenhurst (E) be recommended to Council, for approval for publication and consultation, without amendment.

Voting: Unanimous

The Board considered the proposal for the Redhill and Northbourne area. The Chair suggested an amendment to incorporate an area which self-identified as Northbourne. It was confirmed by the Deputy Monitoring Officer that the proposals could be amended slightly to accommodate the changes in elector numbers. There was debate as to whether the Kinson area Councillors supported this proposal. This amendment was moved and seconded but lost.

Voting: 4 in favour 6 against 3 abstentions.

It was then RESOLVED that the O&S Board recommend to Cabinet that the draft recommendations of the Task and Finish Group relating to Redhill and Northbourne (G) be recommended to Council, for approval for publication and consultation, without amendment

Voting: 9 in favour 3 against 1 abstention

The meeting adjourned at 9.07pm and resumed at 9.19pm.

116. Bournemouth Development Company LLP Business Plan

The Leader of the Council presented a report, a copy of which had been circulated to each Member and a copy of which appears as Appendix 'B' to these Minutes in the Minute Book. Bournemouth Development Company LLP ("BDC") is a joint venture between the Council and Community Solutions for regeneration Bournemouth, a subsidiary of MUSE Developments Limited (itself a subsidiary of Morgan Sindall Group plc). It was established in 2011 and is currently due to expire in 2031.

In March 2023, Cabinet approved a request to extend the Site Option Execution Date for Winter Gardens to September 2024. This date has passed and a further extension is required in order for BDC to continue working on a new scheme.

A Strategy Day was held on 6 December to review and consider options for moving forward with the Winter Gardens site. Following that meeting, Muse have committed funds to take forward new high-level design and capacity work for the site. Early indications show potential for a housing-led scheme with circa 500 homes, including a good proportion of affordable homes, along with some street level retail and commercial space. The purpose of the report was to update Cabinet on progress since the recent BDC Strategy Day, to agree the proposed timetable for the new Partnership Business Plan and to update on the priority project, Winter Gardens, including the proposed strategy for bringing forward residential development on the site, which requires approval to extend the Site Option Execution date.

The Winter Gardens site should remain a landmark mixed-use site with car parking and active frontage. The suggestion for the site was for an extensively housing led scheme, and it was suggested by a Board member that this would not be considered as regeneration. The Leader advised that the essential need at present was for housing and that this should be a greater priority than parking provision. Much needed homes could be delivered, and this site would also deliver commercial offerings such as restaurants. In terms of podium parking the issue was viability and this decision would come to full Council for a decision.

The report advised that the development would include a good proportion of affordable homes and clarification on this was sought. The next stage of the process would refine this issue as a pre-planning application was developed. The Leader advised that as much affordable and social housing should be provided as would make the scheme viable.

Concern was raised that the option execution date was proposed to be extended, and it was suggested that the plans should be developed first if the Council was unsure as to whether it wanted this to proceed. The Leader advised that the Council did want this to proceed. In terms of social housing and the funding of the scheme was dependent upon the relationship with homes England. The proposal placed forward would be very important for regeneration in the Town Centre in terms of footfall.

There were a number of risks associated with moving forward. FuturePlaces was of the opinion previously that this was not a viable site to take forward. It was important to have a culture within a Council to drive forward regeneration. Cross-party support to take projects forward was needed. It was suggested that at present there was not enough resource put into regeneration. If the Council wanted to deliver regeneration on the scale that was needed this area, then a number of cultural issues needed to be addressed.

Concerns were raised that there was a lack of ambition to deliver viable regeneration schemes and in order to progress it needed to be acknowledged that the site was only suitable for certain types of development. The Leader advised that the report was coming forward because there was ambition to deliver on this site. The Leader supported the Improvement and Development Directorate and the work which it was progressing.

It was noted that the scheme did not currently exist and was not within the Council's capital programme. There were a number of loans to BDC and outstanding loans for the purchase of the land for the Winter Garden's site. The Chair commented that it was important to see what the full business plan of the BDC was.

It was suggested that the O&S Board recommend to Cabinet that a decision to extend the option execution date be deferred until the new BDC business plan had been approved by Cabinet. It was noted that the way BDC was working was different to the way in which was originally

envisioned and this needed to be fully reconsidered in terms of bringing forward a Business Plan. The viability of the site would need to feed into a BDC business plan, and this would require the amendment to the 'Option Execution Date'.

A BDC Board Member advised that the change in the structure of the Board was not as effective without senior officer representation. It was further noted that the current partner was not interested in the development of some of the smaller sites. Any site can be developed through BDC and using BDC there was a level of control that BCP could have which would not be available with sites which were in total commercial control. It was noted that all of the schemes previously delivered had been funded slightly differently depending upon the situation and financial conditions at the time.

The Leader advised that they were taking a lead in this area and were making significant changes in the way regeneration was progressing. The Leader advised that they did understand there were issues but that they were working hard to address these.

It was noted that MUSE had requested the extension and without this they would not continue with the work.

Cllr K Salmon and C Weight left during the consideration of this item.

RESOLVED that the O&S Board recommend to Cabinet that a decision to extend the Winter Gardens site 'Option Execution Date' is deferred by Cabinet until the new BDC Partnerships Business Plan has been approved by Cabinet.

Voting: 5 in favour, 5 against, 1 abstention (6:5 following the Chair's casting vote).

Cllrs P Broadhead and L Dedman left following the vote on this item.

117. Strategic Community Infrastructure Levy (CIL)

The Leader of the Council presented a report, a copy of which had been circulated to each Member and a copy of which appears as Appendix 'C' to these Minutes in the Minute Book. The Board was advised that the Community Infrastructure Levy (CIL) is collected from development and used to fund infrastructure necessary to support planned growth set out by the Draft BCP Local Plan. CIL receipts are split into strategic, neighbourhood and administration components. We can only spend CIL once it is received.

Strategic CIL spending governance was agreed by Cabinet in 2021. The Capital Briefing Board (CBB) assesses project bids for strategic CIL and recommends which projects receive spending, subject to following the necessary sign off procedures in accordance with the financial regulations.

Service providers have identified £121.8m infrastructure projects for CIL funding over the next 5 years. This exceeds the projected uncommitted £29.3m Strategic CIL budget and so prioritisation is necessary. This paper asks Cabinet to recommend to Council the priorities for Strategic CIL spend enabling CBB to manage the process.

The preferred approach to prioritisation was set out in Option 2 in the report, to put approximately 80% of Strategic CIL towards large infrastructure projects essential to support local plan growth. The provision of Poole Town Centre flood defences and habitats sites mitigation are critical to enable the Council to grant planning permission. Approximately 20% of CIL remains for discretionary infrastructure projects.

The Board asked about how the different options were developed. It was noted that the two main infrastructure issues to be addressed was the Poole Town flood defences and habitat site mitigation. The technical work to draw this up came through with a package, the largest component of this was transport issues. An infrastructure delivery schedule was drawn up in consultation with infrastructure providers and the overall proposals were developed from this. Smaller projects could be agreed through delegated authority and others would need to go through Cabinet and/or Council approval process.

It was noted that there was a significant level of risk identified within the proposals. It was suggested that there should be political oversight in terms of the items outlined. It was noted the priorities changed over time and other, more significant risks were being assessed.

Comments were made that were Broadly supportive of option 2 as set out in the report. However, there were concerns raised around the governance arrangements to support this.

Support was also voiced for option 4 and the Board questioned why option 4 was not given further consideration. It was noted at this stage it was thought more useful to have the additional funding available through the 18 percent discretionary spend at option 2. It was also noted that it was not desirable to allocated funds to phase 2 of the play strategy at present as phase 1 had not been completed and there were potentially other options for funding for this.

RESOLVED That the Board recommended to Cabinet:

- 1. That the spending priorities for Strategic CIL as set out in Option 2 of the paper over the period 2024/25 to 2029/30 be agreed provided CIL income is as forecast; and**
- 2. That the report be updated annually for Cabinet and Council.**

Voting: Unanimous

The Chair presented a report, a copy of which had been circulated to each Member and a copy of which appears as Appendix 'D' to these Minutes in the Minute Book. The Chair advised that there were two new items added to the Plan. The Chair proposed that the Commercial Operations item be moved to the Board's meeting in June. The Board agreed these changes.

The Chair also advised the Board members that there were no scheduled items on the Work Plan for the Board's next scheduled meeting and therefore it was probable that this meeting would be cancelled.

A Board member suggested an additional item for the Board to review the culture of BCP Council in advance of the recruitment of a new Chief Executive. It was noted that timing may be difficult as the recruitment process has already begun. It was suggested that an item request form be submitted, and this could then be added to the Board's Work Plan.

RESOLVED That the Work Plan be agreed subject to the amendments outlined above.

The meeting ended at 11.19 pm

CHAIRMAN

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ACTION SHEET – BOURNEMOUTH, CHRISTCHURCH AND POOLE OVERVIEW AND SCRUTINY BOARD

Updated – 28 April 2025

Minute number	Item	Action* *Items remain until action completed.	Benefit	Outcome (where recommendations are made to other bodies)
Meeting Date: 6 January 2025				
89.	BCP Community Safety Partnership Annual Report	Response to be sought from the Police on the query around crime reporting in the early hours.	To ensure all issues raised by the Board are repsoned to.	A link to this information has been circulated – remove from Action Sheet
Meeting Date: 3 February 2025				
103a	Action Sheet	O&S Board Chair to follow up on responses received regarding the Housing Delivery CNHAS update.	To ensure completion of any outstanding issues	
106	Council Budget	RESOLVED that the O&S Board recommend to the Audit and Governance Committee that it instigate an investigation on the Carters Quay development.	To ensure that issues arising with this project are investigated	The recommendation was taken to the A&G committee on 27 February – It was RESOLVED that: a) The Audit and Governance Committee includes on its work plan for 2025/26 an investigation into the Council's governance and processes around regeneration projects with focus on the Carter's Quay development;

				b) The Audit and Governance Committee asks for an update on the current ongoing work on the Carter's Quay development as part of the Corporate Risk Register report at the next committee meeting on 20 March 2025.
Meeting Date: 4 March 2025				
115	Community Governance Review – Draft Recommendations	RESOLVED That the O&S Board Recommend to Cabinet 1. That the draft recommendations of the Task and Finish Group relating to proposals for Burton and Winkton (A), Hurn (B), Highcliffe & Walkford (C) and Christchurch Town (D) be recommended to Council, for approval for publication and consultation, without amendment. 2. That the draft recommendations of the Task and Finish Group relating to Broadstone (F) and Poole Town (J) be recommended to Council, for approval for publication and consultation, without amendment. 3. That the recommendation for Bournemouth (K) not be forwarded to Council. 4. That draft recommendations of the Task and Finish Group relating to Southbourne (I)) be recommended to Council, for		

		<p>approval for publication and consultation, without amendment.</p> <p>5. That the draft recommendations of the Task and Finish Group relating to Boscombe and Pokesdown (H) be recommended to Council, for approval for publication and consultation, without amendment.</p> <p>6. That the draft recommendations of the Task and Finish Group relating to Throop and Holdenhurst (E) be recommended to Council, for approval for publication and consultation, without amendment.</p> <p>7. That the draft recommendations of the Task and Finish Group relating to Redhill and Northbourne (G) be recommended to Council, for approval for publication and consultation, without amendment</p>		
116	Bournemouth Development Company LLP Business Plan	RESOLVED that the O&S Board recommend to Cabinet that a decision to extend the Winter Gardens site 'Option Execution Date' is deferred by Cabinet until the new BDC Partnerships Business Plan has been approved by Cabinet.		
117	Strategic Community Infrastructure Levy (CIL)	<p>RESOLVED That the Board recommended to Cabinet:</p> <p>1. That the spending priorities for Strategic CIL as set out in Option 2 of the paper over the period 2024/25 to 2029/30 be agreed provided CIL income is as forecast; and</p> <p>2. That the report be updated annually for Cabinet and Council.</p>		Recommendations Accepted

CABINET



Report subject	BCP Council Complaints Policy
Meeting date	13 May 2025
Status	Public
Executive summary	<p>An effective complaints process demonstrates commitment to accountability, fosters trust amongst customers and stakeholders, and provides a structured way to address concerns appropriately and promptly.</p> <p>Recent revisions to the Local Government Ombudsman Complaint Handling Code have introduced changes designed to enhance the efficiency, transparency and responsiveness of local authorities in handling complaints. These modifications affect the operations and policies of all UK local authorities.</p> <p>The BCP Council Complaints Policy has been updated and additionally, a separate new policy has also been prepared regarding Unreasonable Actions, as also recommended by the Local Government Ombudsman.</p>
Recommendations	<p>It is RECOMMENDED that Cabinet:</p> <ol style="list-style-type: none"> 1. Approves the updated BCP Complaints policy 2. Approves the Unreasonable Actions policy.
Reason for recommendations	These policies now reflect the changes at a national level that are being introduced by the Local Government Ombudsman.

Portfolio Holder(s):	Cllr Andy Martin, Portfolio Holder for Customer, Culture & Communications
Corporate Director	Glynn Barton, Chief Operations Officer
Report Authors	Jane Potter, Head of Business Management, Complaints and Children's Services Information Governance Ellen Miles, BCP Complaints Manager Katie Whitney, BCP Complaints Manager
Wards	Council-wide
Classification	For approval

Background

- The council provides a wide range of services to local residents, customers and stakeholders, and it is inevitable that from time to time some customers may not feel satisfied with the outcome of their interaction, or the way in which their concerns were handled. An effective complaints process contributes to developing and maintaining public confidence in the council, as well as supporting learning through which services can continuously improve.
- Recent revisions to the Local Government Ombudsman Complaint Handling Code aim to enhance efficiency, transparency and responsiveness in handling corporate complaints. These changes necessitate an update to BCP Council's complaints policy. The changes required do not affect the statutory complaints processes for Adult and Children's Social Care which are stand-alone procedures. The following is a list of key changes that are now reflected in the revised Complaint's Policy (see Appendix 1):

4. Simplified Complaint Process

The new code mandates a streamlined complaint process, reducing the steps required for a complaint to be filed and resolved. This aims to make the process more accessible to the public and reduce administrative burdens on local authorities. The simplified process means that individuals can file complaints more easily without navigating complex procedures, thereby promoting quicker resolutions.

5. Time Frames for Resolution

The code introduces stricter time frames for the resolution of complaints. Local authorities must acknowledge receipt of a complaint within five working days (currently 3 working days) and provide a substantive response within 10 working days (currently 20 working days) for stage 1 complaints, and 20 working days for a Stage 2 complaint (currently 15 days). Extensions are allowed only under exceptional circumstances and complainants must be informed of any delays promptly.

6. Training and Development

BCP Council will implement regular training programs for staff involved in complaint handling. These programs are designed to ensure that staff are well-equipped to manage complaints effectively and sensitively. A targeted training programme is already under development within the Council.

7. Standardised Response Formats

To ensure consistency and clarity in communications with complainants, BCP Council will adopt standardised response formats. This includes templates for acknowledgement letters, substantive responses and follow-up communications. Standardising response formats helps to maintain a professional and uniform approach in all communications, making it easier for complainants to understand the outcomes and processes involved in their complaints.

8. Support for Vulnerable Complainants

BCP Council will provide additional support for vulnerable individuals. This involves ensuring clear guidance and access to support services for those who require assistance navigating the complaint process. The Council's commitment to supporting vulnerable complainants ensures that everyone, regardless of their circumstances, has access to the necessary resources to submit and resolve complaints effectively.

9. Enhanced Transparency

BCP Council will now be required to publish more detailed information about its complaint handling procedures and outcomes. This includes annual reports on the number of complaints received, the nature of these complaints and the resolutions achieved. This level of transparency is expected to build public trust and ensure accountability.

10. Regular Audits and Monitoring

BCP Council will be subject to regular audits and monitoring by the Ombudsman to ensure compliance with the new code. The first audit on KPI's would be in April 2027. These audits will assess the effectiveness and efficiency of complaint handling procedures and identify areas for improvement. This new monitoring arrangement will be facilitated by a reporting tool within the new complaints database. These changes are potentially time intensive for officers, but it is intended that the new case management system will automate the procedures by April 2027.

11. Feedback and Continuous Improvement

Local authorities are encouraged to actively seek feedback from complainants to improve their services. This includes conducting satisfaction surveys and implementing changes based on the feedback received. Within BCP this is a standard element within the correspondence with complainants, however we will be working on ensuring all feedback is comprehensively captured across the whole local authority with the launch of the new central complaints database. These changes are potentially time intensive for officers, but it is intended that the new case management system will automate the procedures by April 2027.

12. Collaboration and Best Practices

Local authorities are encouraged to collaborate and share best practices in complaint handling. The code promotes the establishment of networks and forums where local authorities can exchange experiences and strategies for improving their complaint handling processes.

13. Use of Technology

The new code advocates for the use of technology to enhance complaint handling. This includes online complaint submission forms, automated tracking systems and digital communication channels to facilitate quicker and more efficient resolutions. All of these initiatives are being built into the new complaints management database.

14. Accountability for Unresolved Complaints

Local authorities are required to provide clear explanations for any complaints that remain unresolved and outline the steps taken to address the issues. This ensures that complainants understand the reasons for any delays or failures in resolution.

15. Impact Assessment

The code requires local authorities to conduct regular impact assessments of their complaint handling processes. These assessments measure effectiveness and identify resolution barriers. BCP Central Complaints ensures that insights from these assessments are used for service improvements or procedural changes.

16. Unreasonable actions (formerly UPC)

The new policy on unreasonable actions, formerly known as Unreasonably Persistent Complainants (UPC), aims to provide clarity and fairness in handling complaints from individuals whose actions may be deemed unreasonable. This includes setting clear guidelines on what constitutes unreasonable behaviour, such as excessive demands or harassment and establishing procedures to manage and respond to such complaints effectively. The policy ensures that complainants are treated respectfully while safeguarding the wellbeing of staff and maintaining the integrity of the complaint handling process. The revised policy is attached at Appendix 2.

17. Clarity around Service Requests

The Ombudsman guidance provides clear distinctions between complaints and service requests to ensure appropriate handling and resolution. This distinction is now reflected in our reviewed policy.

A complaint typically involves dissatisfaction with the service provided, the behaviour of staff, or an administrative process, where the complainant feels that the authority has failed in its duties. Examples of complaints include instances where a service was not delivered as promised, improper conduct by a staff member, or perceived injustices in the application of procedures or policies.

Conversely, a service request is an appeal for assistance or service provision that has not yet been performed. Examples of service requests include requesting a repair for a public facility, reporting issues like potholes or broken streetlights, or seeking specific information about services offered by the local authority.

The distinction allows the Council to direct complaints to the appropriate resolution channels while ensuring that service requests are addressed through the relevant departments.

18. The single complaints policy links with the statutory complaints policies for Children's Services, Adult Social Care and Housing. These policies remain independent, with the single corporate policy serving as an overarching reference for adherence to Ombudsman guidance and the primary source of guidance for all corporate non-statutory complaints.
19. Since adopting a centralised model of complaints, most of the recommendations within the Ombudsman code have been implemented as best practice or are a work in progress, such as the single case management system, which will go live by 1 April 2026. By adopting a revised complaints policy which fully adheres to the new code, we can ensure we are complying with the Ombudsman's objectives of fostering greater public trust and accountability in our complaints management and operations.
20. The new code requires a lead member to act as champion for the organisation's complaints process, and this role will be performed by the Portfolio Holder for Customer, Communications & Culture.

Summary of financial implications

21. There are no financial implications associated with this policy change.

Summary of legal implications

22. Legal Services have been consulted in the preparation of the new policy.

Summary of human resources implications

23. There are no HR implications associated with the adoption of this complaints policy.

Summary of sustainability impact

24. There are no sustainability impact issues associated with the adoption of this revised policy.

Summary of public health implications

25. The adoption of this revised policy does not entail any public health implications.

Summary of equality implications

26. There are no equality implications associated with the adoption of this policy.

Summary of risk assessment

27. The risk assessment highlights the dependency on the new single case management system to effectively monitor and comply with the Ombudsman recommendations and produce the required KPI's from 2027 onwards. Without this automated system, adherence to compliance would demand significant manual effort, making the process labour-intensive.

Background papers

None

Appendices

Appendix 1: Revised Complaints Policy

Appendix 2: Unreasonable actions (formerly UPC) Policy

Appendix 3: Ombudsman code



COMPLAINT HANDLING POLICY

If you require this information in an alternative format please call us on
01202 123321 or email BCPComplaints@bcpCouncil.gov.uk

BCP Complaints Service

Author: Ellen Miles
Version: V1.0
Date: 07 March 2025

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1. Introduction

- 1.1. BCP Council is committed to providing an excellent service for our customers. We do, however recognise our customers have a right to challenge the Council over its decisions and complain when they feel we have fallen short of the services we provide.
- 1.2. As well as giving the Council the chance to put things right when something has gone wrong, complaints give us valuable feedback, so that we learn from customer's experiences and help us to improve our services.
- 1.3. The Council is committed to developing a positive and transparent complaint handling culture. We recognise complaints as helping us to identify issues and supports us to introduce positive changes. The Council's objective in relation to complaints is to ensure complaints are handled in line with the complaints policy. We ensure that is collaborative and that we take collective responsibility for any learning identified as part of the process.
- 1.4. The Head of BCP Business Management oversees complaint handling and performance. The appropriate Complaints Manager is responsible for ensuring themes and trends are assessed to identify potential systemic issues, serious risks, or policies and procedures that require revision. This function is supported by complaint officers in each directorate.
- 1.5. The Council's Audit and Governance Committee is responsible for maintaining oversight of complaints.
- 1.6. The Council produces an annual complaints performance report for scrutiny and challenge by the Audit and Governance Committee and the Overview and Scrutiny Board in addition to regular complaints reports which are also made available to wider stakeholders on our website.

- 1.7. The Council's complaints reports include information about the volume, categories and outcomes of complaints, complaint handling performance, issues and trends arising from complaint handling, and wider learning and improvements made because of complaints.
- 1.8. The Council will carry out an annual self-assessment against the Local Government and Social Care Ombudsman's (LGSCO) [Complaint Handling Code](#) to ensure this policy remains in line with the code and aims to carry out a formal review of the policy every two years.

2. Scope of the Complaint Policy

- 2.1. This Complaint Policy explains our process for managing general complaints made to the council. It does not apply to complaints about the following, which are outside the scope of the policy:
 - [Adult Social Care](#)
 - [Anti-social behaviour case review](#)
 - [BCP Homes complaints](#)
 - [Blue badge appeals](#)
 - [Children's Social Care](#)
 - [Complaints about Councillors](#)
 - [Fixed penalty notice \(FPN's\)](#)
 - [Food hygiene rating appeal](#)
 - [Housing Benefit](#) and [Council Tax Benefit](#) entitlement disputes
 - [Insurance claims against the council](#)
 - [Parking ticket appeals \(PCN's\)](#)
 - [Planning appeals about the refusal of planning permission](#)
 - [School admission appeals](#)
- 2.2. The policy does not apply to complaints by council staff that relate to their employment.
- 2.3. Complaints that fall within the scope of this policy are managed by the central complaints team within our Business Support directorate or nominated complaints officers within service directorates.

3. What is a complaint?

- 3.1. **A complaint** may be defined as: 'an expression of dissatisfaction, however made, about the standard of service, actions or lack of action by the organisation, its own staff, or those acting on its behalf, affecting an individual or group of individuals.'
There is a difference between a complaint and a request for a service or an enquiry about a service, which is usually referred to as a 'service request'.
- 3.2. **A service request** may be defined as: 'a request that the organisation provides or improves a service, fixes a problem or reconsiders a decision.'
- 3.3. A service request may escalate to become a complaint. Customers will also be given the option of making a complaint if they express dissatisfaction with the response to their service request. Service requests will be recorded, monitored, learning taken as applicable and included in complaint reporting.

- 3.4. A customer does not need to use the word complaint for it to be treated as such. The Council will seek to resolve the issues raised in the most appropriate manner and as quickly as possible. The Council will seek to ensure staff recognise the difference between a service request and a formal complaint and the Complaints Team will support colleagues to recognise the difference.
- 3.5. The Council will accept a complaint unless there is valid reason not to do so.
- 3.6. Valid reasons for not accepting a complaint include:
- the issue is, or has been subject to legal proceedings
 - where there is an appeals process available
 - the matters raised are subject to a safeguarding inquiry
 - there is a liability issue that is subject to an insurance claim
 - the complaint has not been raised in a reasonable timeframe (see 4.9)
 - the complaint has been raised by an unauthorised or inappropriate third party
 - the issue has already been considered as a complaint
- 3.7. If the Council decides not to accept a complaint, we will explain clearly why the matter is not suitable for the complaints process and what the next steps in the process are.

4. The way we manage complaints

- 4.1. The Council has a 2-stage complaint process. The process for managing complaints is set out in sections 7-11 below.
- 4.2. Complaints will be managed in adherence to this policy and in conjunction with the guidance set out by the Local Government and Social Care Ombudsman in their complaint handling code.
- 4.3. All complaints are managed confidentially and impartially, regardless of who is making the complaint. Please see section 7 for further information.
- 4.4. All complaints will be responded to promptly, and in accordance with the timescales set out in this policy wherever possible.
- 4.5. Where we are unable to meet the timescales set out in the policy, we will let the customer know there has been a delay and arrange an appropriate extension.
- 4.6. Customers will be kept informed of the progress of their complaint and of any delays.
- 4.7. If a complaint is made to a Councillor(s) or MP, the customer will be referred to the complaint function and the complaint will be managed in line with this policy. The Councillor(s) or MP will only be provided with a copy of the response to the complaint on provision of suitable consent from our customer.
- 4.8. Where complaints involve multiple service areas, the service with the most significant involvement in the complaint will coordinate the response. The complaints team acknowledging the complaint will act as a single point of contact for the complainant whilst the investigation is being undertaken.
- 4.9. We will consider stage 1 and stage 2 complaints made within 12 months of the issue occurring or becoming apparent to the person making the complaint. We may still consider a complaint made outside of the timescales if there are exceptional circumstances, but this will be determined on a case by case basis.

5. Support for customers who make a complaint

- 5.1. We are committed to making sure the way we handle complaints does not place anyone at a disadvantage. We will attempt to make suitable and equitable reasonable adjustments if the way we handle complaints would otherwise place a person with disabilities or other characteristics at a substantial disadvantage.
- 5.2. Customers who would like the Council to make a reasonable adjustment to enable them to make a complaint should make a request to the complaints function. A request for a reasonable adjustment can be made through any channel, or via a representative.

6. Ways to make a complaint

- 6.1. The Council will accept complaints made verbally or in writing, and via any of its customer service channels, including:
 - In person
 - By telephone
 - By letter or email
 - Through our online complaint form
 - Through direct contact via social media channels
 - Through a Councillor or MP subject to appropriate consent being in place
 - Through a representative, subject to appropriate consent being in place
- 6.2. Verbal complaints will be confirmed with the person making the complaint. If we confirm the complaint verbally, we will follow up with a written confirmation where appropriate. Once agreed, complaints will be processed in line with this policy. A formal acknowledgement of the complaint will be provided to the complainant regardless of the method in which the complaint is received.
- 6.3. Anonymous complaints will not be processed in line with this policy. They will be forwarded to the relevant service as a service request, to ensure appropriate action and/or suitable learning is taken where applicable.
- 6.4. Complaints made via third party websites or other platforms that are designed to generate multiple complaints on the same or similar subjects will not be processed in line with this policy.
- 6.5. Everyone has the right to appoint a representative, that is someone else to act on their behalf. A representative can be, for example, a parent, a husband, wife, or civil partner, an adult child, a friend, an attorney, advocate, or solicitor, or a local Councillor or MP. You can search for details of your [local Councillor online](#).
- 6.6. If a complaint is made through a representative, we will need to ensure we have consent from the customer. This would usually be written consent from the customer giving the representative permission to act on their behalf, or other evidence, for example evidence of lasting power of attorney.

7. How we identify and accept a complaint

- 7.1. Complaints or matters that could be considered a complaint that fall within the scope of this policy are referred to the appropriate complaint function in the first instance.
- 7.2. The complaint officer(s) will review all complaints, considering:
- whether the complaint falls within the complaint definition at section 3.1 of this policy, or whether it is a service request in line with the definition at section 3.2
 - whether the complaint should be accepted, with reference to the reasons a complaint cannot be considered set out at section 3.6
 - whether the complaint should be considered under the corporate complaints policy, or whether it falls under a different policy in line with the policy exclusions set out at section 2.1.
- 7.3. If a complaint is valid, it will be logged by the complaints officer as a stage 1 complaint within **5 working days** of the complaint being received. If the issues will not be managed as a complaint, the Council will communicate with the individual raising the matter and explain what the next steps in the process are.
- 7.4. If the complaint is unclear, the complaints officer will seek clarification from the customer before the complaint is logged.
- 7.5. The Council is able to use personal information that it holds for the purposes of investigating concerns or complaints. That includes the Council sharing necessary data and information internally. Sometimes it is appropriate to appoint an independent third party who has no prior knowledge of the complaints or issues. Whether an investigator is appointed internally or externally, the Council will require all those involved to comply with the various legal obligations regarding personal information and data.

The Council's Privacy Notices makes the above clear:

<https://www.bcpccouncil.gov.uk/privacy>

<https://www.bcpccouncil.gov.uk/privacy-notices/childrens-services-privacy-notice>

<https://www.bcpccouncil.gov.uk/privacy-notices/adult-social-care-complaints-privacy-notice>

The Council will always seek consent from any party that is involved where it is appropriate to do so. If it were prevented from sharing information, any investigation would most likely be hampered. The Council will only process data in accordance with its legal obligations.

8. Stage 1 complaints

- 8.1. Once a complaint has been received, the complaints officer(s) will consider a range of factors including the complexity of the complaint and the specific needs of the individual customer and assess if the complaint may be responded to within **10 working days**. If this is not possible, and a more detailed response or investigation is needed whether an extension to the response time is needed. The acknowledgement will be prepared for the complainant to reflect these timescales.

- 8.2. The complaint will then be passed to the relevant manager to respond, in line with the assessment of the complaint and in line with the timescale appropriate to the complaint. Responses will be proportionate to the issues raised.
- 8.3. Where complaints involve more than one Council service, the manager responding to the complaint should act as a liaison point with the services involved. The complaints officer will act as a single point of contact for the customer.
- 8.4. The Council will aim to respond to complaints promptly and within 10 working days of the complaint being acknowledged.
- 8.5. If a complaint is complex and requires more detailed investigation, the length of time allowed for the complaint response will be extended at the earliest opportunity and communicated to the customer.
- 8.6. The timescales for more complex complaints will be determined on a case-by-case basis at the outset, but should not exceed 20 working days, without good reason.
- 8.7. Once an investigation has started, if a further extension is required, this will be exceptional, and the reason will be clearly communicated to the customer.
- 8.8. The quality assurance of any stage 1 complaint response is the responsibility of complaint officer(s) for that directorate.
- 8.9. We will send the customer an acknowledgement in writing by email, or by post if an email address is not provided, within five working days of logging the complaint. In acknowledging the complaint, we will briefly confirm:
- our understanding of the complaint and the outcomes being sought
 - the investigating officer or investigating area
 - when the customer can expect a response
- If the Council is not responsible for any aspect of the complaint, this will be clearly explained in the complaint acknowledgement.
- 8.10. In acknowledging the complaint, we will offer the customer the opportunity to review their acknowledgement and make amendments as necessary. This ensures we have the correct understanding of the complaint and the outcome being sought is clear.
- 8.11. Complaint responses will be provided when the answer to the complaint is known, not when the outstanding actions required to address the issue are completed. If there are outstanding actions, these should be explained in the complaint response, actioned promptly and tracked by the service responsible for the complaint response, and where appropriate the customer will be provided with updates.
- 8.12. The format of stage 1 complaint responses will depend on the nature of the complaint and the needs of the customer. Responses to stage 1 complaints can be written, verbal or in an audio format as necessary.
- 8.13. In all cases, a full response to the complaint should be made and an explanation, apology or other resolution will be provided to the customer.

- 8.14. In all cases, the complaint response should cover all the points made by the customer and provide clear reasons for any decisions, referencing the relevant policy, law or good practice where appropriate.
- 8.15. The stage 1 complaint response should include details of how to escalate the matter to stage 2 of the complaint process if the customer is not satisfied with the response.
- 8.16. The complaint response will be recorded by the complaints officer(s) for that directorate on the Council's complaint recording system.
- 8.17. If the customer making the complaint wants to raise additional issues related to the complaint, we will aim to incorporate the additional issues into the stage 1 response. Where the new matters are not related, the stage 1 response has already been provided, or addressing the additional issues would unreasonably delay the response to the original complaint, a new stage 1 complaint will be logged.

9. Stage 2 complaints

- 9.1. If the customer is unhappy with the response to their stage 1 complaint, then they should ask the Council to escalate their complaint to stage 2. An escalation or review should be made within 20 working days of receipt of the stage 1 response.
- 9.2. Requests for stage 2 will be acknowledged and logged at stage 2 of the complaint's procedure within **5 working days of the escalation request being received**.
- 9.3. If in making a request to escalate a complaint to stage 2, the customer does not explain their reasons for the request, we will make reasonable efforts to try and understand why the customer remains dissatisfied. A complaint may be declined an escalation if the reasons remain unknown.
- 9.4. In acknowledging the stage 2 complaint, we will briefly confirm:
- our understanding of the complaint and the outcomes being sought
 - clarification of what will happen next and the process being undertaken
 - the investigating officer(s) details
 - when the customer can expect a response
- 9.5. In acknowledging the complaint, we will offer the customer the opportunity to review their acknowledgement and make amendments as necessary. This ensures we have the correct understanding of the complaint and the outcome being sought is clear.
- 9.6. If a complaint is escalated to stage 2, we will carry out an investigation that is appropriate to the nature of the complaint. This may be a simple review of the stage 1 process, or alternatively a further investigation with an adjudication may be made. The complaints officer(s) will assess the stage 2 complaint, considering factors including complexity and the individual circumstances.
- 9.7. We aim to respond to stage 2 complaints within **20 working days** of the complaint being acknowledged.
- 9.8. If we think a response will take longer due to the complexity of the complaint, we will inform the customer of the length of time we expect the response to take at the outset.

- 9.9. Any extension will not be more than an additional 20 working days without good reason. If an extension of more than 20 working days is required, this will be exceptional, the reasons will be clearly communicated to the individual making the complaint and they will be provided with the details for the Local Government and Social Care Ombudsman (LGSCO).
- 9.10. Stage 2 complaints will be investigated by:
- the appropriate Director, or
 - an appropriate senior manager. This manager will be different to the person who responded at stage 1
- 9.11. As with stage 1, where complaints involve more than one Council service the manager responding to the complaint should act as a liaison point with the services involved. The complaints officer will act as a single point of contact for the customer.
- 9.12. When we respond to a stage 2 complaint, our response will be confirmed in writing, in clear, plain language. The response will include:
- the complaint stage
 - our understanding of the complaint, in line with the complaint acknowledgement
 - the decision on the complaint
 - the reasons for any decisions made
 - details of any remedies offered to put things right, in line with section 11 below
 - details of any outstanding actions, if applicable
 - details of how to escalate the matter to the LGSCO if the individual remains dissatisfied
- 9.13. Stage 2 is the final stage of the Council's complaints process.

10. Local Government and Social Care Ombudsman

- 10.1. If a customer remains unhappy having exhausted the council's complaints process, they can contact the Local Government and Social Care Ombudsman (LGSCO):
- Online complaint form at www.lgo.org.uk
 - Telephone 0300 061 0614

The LGSCO will not investigate most complaints until they have gone through the council's complaints process.

11. Remedies

- 11.1. Where something has gone wrong, we will acknowledge this and set out the action that has already been taken or that we will take to put things right.
- 11.2. We will aim to ensure remedies offered reflect the impact on the customer of any fault identified.

- 11.3. When making a remedy offer, we will clearly set out what will happen and by when, in agreement with the customer where appropriate, and we will ensure the remedy is delivered within a reasonable timescale.
- 11.4. If we are not able to deliver a remedy, we will inform the customer, explain why, provide details of an alternative remedy if possible and appropriate, and remind them of their right to complaint to the LGSCO.
- 11.5. Remedies include:
- apologising
 - acknowledging when things have gone wrong
 - providing an explanation, assistance or reasons
 - taking action if there has been a delay
 - reconsidering or changing a decision
 - amending a record, or adding an addendum or correction
 - changing policies, procedures or practices
 - providing a financial remedy
- 11.6. Any issues identified as a result of complaints will be put right as quickly as possible: we will not wait until the complaints process is concluded.
- 11.7. When responding to complaints we will consider whether the customer needs support to understand the outcome and will offer alternatives, including meetings to discuss, where appropriate.

12. Complaints about contractors or commissioned for services

- 12.1. The Council contracts organisations to provide services on its behalf. If a complaint is made about a service provided by a contractor directly to the contractor, it should be managed in line with this policy or processes detailed at point 2.1.
- 12.2. Our contractors are expected to comply with the policy, including providing information to council officers as requested and providing assistance with further investigations as appropriate.
- 12.3. A contractor who receives a complaint is expected to notify the Council of the complaint via the Council's complaints function. Notifications should be made in line with the timescales in the policy, and at all stages in the process so the complaint can be logged and monitored.
- 12.4. If the Council receives a complaint that relates to a service provided by one of the council's contractors, the Council will provide a response.
- 12.5. Complaints relating to contractors/third-party providers working on behalf of the council acting in its capacity as a landlord will be dealt with in accordance with the local authority housing landlord services complaints policy and process.

13. Unreasonable actions by customers

- 13.1. We recognise that someone with cause to complain may be upset, and this may be reflected in their behaviour towards us. In dealing with complaints, we will understand and empathise with customers who are upset.
- 13.2. We also recognise that someone making a complaint is justified in making reasonable attempts to follow up their complaint to make sure it is being dealt with.
- 13.3. However, we expect complaints to be made in a reasonable way so we can investigate. This means communicating with us in a way that is reasonable, both in terms of the nature and frequency of contact.
- 13.4. However, in a small minority of cases, there is a point at which a customer's behaviour becomes unreasonable and makes it more difficult for us to resolve complaints, either because it impedes the investigation or because it takes up a significant amount of time without due cause.
- 13.5. In these cases, the Council will follow its unreasonable actions by customers [policy](#).

14. Review

- 14.1. This policy is the responsibility of the Director of Customer and Property.
- 14.2. This policy will undergo regular review, once every two years, or as required in response to regulatory changes.

Contacts

BCP Council Complaints Team, Civic Centre, Bournemouth, BH2 6DY

Email bcpcomplaints@bcpcouncil.gov.uk

Website [Formal complaints | BCP](#)

Local Government and Social Care Ombudsman ("LGSCO")

Online complaint form at www.lgo.org.uk

Telephone 0300 061 0614

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UNREASONABLE ACTIONS BY CUSTOMERS POLICY

If you require this information in an alternative format please call us on
01202 123321 or email BCPComplaints@bcpcouncil.gov.uk

BCP Complaints Service

Author: Ellen Miles
Version: V1.0
Date: 07 March 2025

Introduction

This policy has been prepared for individuals who demonstrate unreasonable or unreasonably persistent actions or behaviour.

It sets out how we will decide if a customer is being unreasonably persistent or behaving unreasonably and what we will do in those circumstances.

It should be read in conjunction with the council's agreed complaints handling [policy](#).

In a small number of cases people interact with services in a way that is unreasonable. This may include being unreasonably persistent in relation to their contact and submission of information. This can prevent organisations from providing services to the individual and others and have a significant impact on staff wellbeing. These actions can occur during delivery of a service, while a complaint is being investigated, or once an organisation has finished the complaint investigation.

We are committed to dealing with all complaints and customers equitably, comprehensively and in a timely manner.

We do not expect staff to tolerate unacceptable behaviour by complainants or any customer and will take appropriate action to protect them from such behaviour. Our customer charter prescribing acceptable communication standards may be found [here](#).

Definition

BCP Council has adopted the Local Government and Social Care Ombudsman's (LGSCO) definition of 'unreasonable actions'. Unreasonable actions are those which, because of the nature or frequency of contact with an organisation, hinder the organisation's delivery of services or consideration of complaints. A copy of the LGSCO's guidance may be found [here](#).

BCP Council recognise that not all disabilities are visible and therefore prior to restrictions being enforced, we will ensure that how we communicate to deliver our service, is in such a way that is accessible to all. This allows individuals an opportunity to tell us if they need any reasonable adjustments under the Equality Act 2010.

Examples of unreasonable actions:

- a. Being abusive, threatening or acting in a manner intended to intimidate staff. This includes any use of racist, sexist, homophobic or other discriminatory language.
- b. Putting, or threatening to put information on social media or websites which includes personal information of an organisation's employees without their consent and/or making defamatory statements about employees online.
- c. Making excessive demands on the time and resources of staff with lengthy phone calls, emails to numerous council staff, or detailed correspondence every few days or more often, and expecting immediate responses. Denying or changing statements they made at an earlier stage

- d. Submitting repeat contacts or complaints with minor additions/variations which the complainant insists make these 'new' complaints. Introducing trivial or irrelevant new information at a later stage.
- e. Refusing to specify the grounds of a complaint, despite offers of help.
- f. Refusing to cooperate with the complaints investigation process. For example, failing to provide information requested that is important for the investigation.
- g. Insisting on the complaint being dealt with in ways which are incompatible with the adopted complaints procedure or with good practice.
- h. Making unjustified complaints about staff who are trying to deal with the issues, and seeking to have them replaced.
- i. Frequently changing the basis of the complaint as the investigation proceeds.
- j. Raising many detailed but unimportant questions, and insisting they are all answered.
- k. Providing false information and/ or submitting falsified documents from themselves or others.
- l. Adopting a 'scatter gun' approach: pursuing parallel complaints or contact about the same issue with various organisations, officers or Councillors.
- m. Refusing to accept that certain issues are not within the scope of complaints procedure.
- n. Refusing to accept the decision, repeatedly arguing points with no new evidence.

Recording of interactions with organisations by members of the public

Modern technology now allows individuals to record interactions with organisations more easily than at any time in the past. This includes the ability to live broadcast interactions in public and private spaces. Sometimes this can be done without an organisation's knowledge and staff may be understandably concerned about what a person may do with a recording.

BCP Council will not automatically refuse to allow members of the public to record interactions. It is important to acknowledge that organisations can routinely record their interactions with the public for training and monitoring purposes. Customers should not be prevented from making their own recording in order to have a clear record of matters that were discussed. We do however expect customers to advise staff members if they intended to record any interactions and the purpose for doing so.

Having a recording of a meeting or telephone call can be helpful to people with certain disabilities who may struggle to recollect details of what was said or be unable to read or process written records about any interactions.

However, a small number of people will misuse technology and act in a way that is unreasonable. This may include:

- Recording interactions with the Council without good reason.
- Putting recordings online without the consent of those being recorded.
- Live broadcasting interactions with the Council without their consent.
- Manipulating or editing recordings.

Objectives

The objective in taking action is to manage unreasonable behaviour or communication which may hinder the Council's delivery of services or consideration of complaints.

Any actions taken should be proportionate to the nature and frequency of the customer's current contacts. Unreasonable actions can also be an indication of an unmet communication or support need. The following are examples of the types of restriction(s) which may be used:

- a. Placing limits on the number and duration of contacts with staff per week or month
- b. Offering a restricted timeslot for necessary calls
- c. Limiting the complainant to one medium of contact (telephone, letter, email etc.)
- d. Requiring the complainant to communicate only with one named member of staff
- e. Requiring any personal contacts to take place in the presence of a witness and in a suitable location
- f. Refusing to register and process further complaints about the same matter
- g. When a decision on the complaint has been made, tell the complainant that future correspondence will be read and placed on the file but not acknowledged unless it contains new material or information. A designated officer should be identified who will read future correspondence.
- h. Restricting access to discretionary services

BCP Council recognise that there is a duty to make reasonable adjustment under the Equalities Act 2010. However, where the behaviour is so extreme or it threatens the immediate safety and welfare of staff, we will consider other options which could include reporting the matter to the police or taking legal action. In such cases the Council may not give the complainant prior warning of that action.

Implementing a restriction

Staff members are empowered to warn individuals of the consequences of their actions in the first instance. Staff members are also able to take immediate action in response to unreasonable actions such as terminating phone calls, asking someone to leave the premises or pausing communications. Any immediate steps will be followed by either an informal warning about future conduct or consideration of further action under the Council's unreasonable actions policy. Once an informal warning has been issued, this may progress to a formal warning that a restriction or sanctions may be imposed should they not modify their behaviours. The formal warning will be prepared by the Service Manager concerned and will include:

- a. Actions the organisation considers unreasonable;
- b. Examples of actions considered unreasonable;
- c. A time period within which future actions will be monitored and when / how / by whom any restrictions on contact or other actions will be reviewed;
- d. Consequences of failing to address their actions;
- e. A check on whether the individual requires any reasonable adjustments under the Equality Act 2010; and
- f. Details of the organisation's complaints process if the person is unhappy with their warning.

If a decision is taken to apply restricted access or implement a sanction an appropriate Director will write to inform the complainant:

- a. Actions the organisation considers unreasonable;
- b. Examples of actions considered unreasonable;
- c. A time period within which future actions will be monitored; and when / how / by whom any restrictions on contact or other actions will be reviewed;
- d. Consequences of failing to address their actions;
- e. Confirmation the organisation has considered the individual's rights under human rights and equality act legislation; and
- f. Details of the organisation's appeals process **or** details of the Ombudsman if the appeals process has been exhausted.

A copy of this policy should be enclosed with the letter.

All officers and Members who have experienced unreasonable behaviours in respect of a specific customer shall be informed of the decision to impose contact restrictions.

A register of those subject to this policy is maintained by the complaints team. The register will include details of the decision, the restrictions and the time limits if appropriate.

Records

Adequate records must be kept of all contacts with customers behaving unreasonably in the business unit. The information will be treated as confidential and only shared with those who may be affected by the decision.

When complaints or service requests about new issues are made, these should be treated on their merits. We should consider whether any restrictions previously applied are still appropriate and necessary.

Appeals against decisions

Appeals or reviews of the decision to restrict a customer's contact, or the authority's responses to them should be made in writing to the Complaints Manager. They may be contacted at bcpcomplaints@bcpcouncil.gov.uk

When the review has been carried out the Council will write to advise the complainant of the outcome and, if restrictions are to continue to be applied, when these will next be reviewed.

Reviewing decisions to restrict access

When imposing a restriction on access, you will be provided with a specified review date.

Limits should be lifted and relationships returned to normal unless there are good grounds to extend them.

You will be told the outcome of your review. If limits are to continue, BCP Council will explain the reasons and state when the limits will be next reviewed.

Referring complainants to the Ombudsman

The Local Government and Social Care Ombudsman may be prepared to consider a complaint before the Council's complaints procedure has been exhausted. Referral to the Ombudsman should be made when the relationship between the complainant and the Council irretrievably breakdown whilst complaints are under investigation and there is little prospect of achieving a satisfactory outcome.

In addition, a complainant who has been treated as behaving unreasonably may make a complaint to the LGSCO about this. The Ombudsman may be contacted at the following details:

Local Government and Social Care Ombudsman ("LGSCO")

Online complaint form at www.lgo.org.uk

Telephone 0300 061 0614

For further details contact: the Complaints team:

bcpcomplaints@bcpcouncil.gov.uk

Local Government &
Social Care
OMBUDSMAN



Complaint Handling Code

Date published: February 2024

Date applicable: April 2024

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Introduction

Good complaint handling requires effective procedures and well-trained staff alongside a positive complaints culture that enables those procedures to achieve maximum impact. This code sets out what an organisation should do procedurally to handle complaints.

Organisations should embrace complaints through increased transparency, accessibility, and complaint handling governance. Demonstrating that individuals are at the heart of its service delivery and good complaint handling is central to that.

Some organisations see complaints as a form of negative feedback. However, there are many benefits to be gained from having an effective and efficient complaints process:

- > Good complaint handling promotes a positive relationship between an organisation and service users.
- > Complaints allow an issue to be resolved before it becomes worse. Those issues not resolved promptly can take significant resource and time to remedy.
- > Involvement in complaint resolution develops staff ownership, decision-making and engagement.
- > Complaints provide senior staff with essential insight into day-to-day operations, allowing them to assess effectiveness and drive a positive complaint handling culture.
- > Data collected about complaints can be analysed and used to inform key business decisions to drive improvement in service provision.

The Complaint Handling Code ('the Code'), sets out a process for organisations that will allow them to respond to complaints effectively and fairly. The purpose of the Code is to enable organisations to resolve complaints raised by individuals promptly, and to use the data and learning from complaints to drive service improvements. It will also help to create a

positive complaint handling culture amongst staff and individuals.

The Code will act as a guide for individuals setting out what they may expect from an organisation when they make a complaint. Organisations should seek feedback from individuals in relation to their complaint handling as part of the drive to encourage a positive complaint and learning culture.

Organisations should have a single policy for dealing with complaints covered by the Code.

The principles, process and timescales in this Code are aligned with the Complaint Handling Code issued by the Housing Ombudsman. This means that organisations who fall under the jurisdiction of both Ombudsmen should be able to provide a co-ordinated complaint handling process across services covered by both Codes.

The Local Government and Social Care Ombudsman's powers and approach

The Code is issued under the Local Government and Social Care Ombudsman's powers to provide "guidance about good administrative practice" to organisations under section 23(12A) of the Local Government Act 1974. For the Local Government and Social Care Ombudsman, this Code constitutes important advice and guidance to councils, rather than instructions.

We have issued the Code for local councils in England. Other organisations in the Ombudsman's jurisdiction may find the Code helpful in setting out good practice.

We can recommend an organisation takes action to improve services or provide a personal remedy where it finds fault causing injustice to an individual or group of individuals. Unlike the Housing Ombudsman, we have no specific responsibility for monitoring compliance with the Code in addition to our role investigating complaints of maladministration and service failure.

Using the Code

We expect local councils to carefully consider the Code when developing policies and procedures. Where an organisation decides that it will depart from the Code, it should ensure local decision-making processes have been properly followed.

We may make a finding of maladministration where local councils' policies and procedures depart from the Code without sufficient explanation. We may also make a finding of maladministration where a local council, without good reason, does not meet the standards in the Code when responding to an individual complaint.

Where an organisation is unable to comply with its policies and procedures when dealing with an individual complaint, the individual should be provided with a suitable explanation and signposted to the Ombudsman.

The Code should be considered along with other guidance issued by the Local Government and Social Care Ombudsman.

The Code does not replace any existing statutory complaint processes such as The Children Act 1989 Representations Procedure (England) Regulations 2006 or Local Authority Social Services and National Health Service Complaints (England) Regulations 2009.

The Complaint Handling Code

1. Definition of a service request and complaint

- 1.1 Effective complaint handling enables individuals to be heard and understood. The starting point for this is a shared understanding of what constitutes a service request and what constitutes a complaint. In most cases organisations should be able to put things right through normal service delivery processes.
- 1.2 A service request may be defined as:
‘a request that the organisation provides or improves a service, fixes a problem or reconsiders a decision.’
- 1.3 This provides organisations with opportunities to resolve matters to an individual’s satisfaction before they become a complaint.
- 1.4 A complaint may be defined as:
‘an expression of dissatisfaction, however made, about the standard of service, actions or lack of action by the organisation, its own staff, or those acting on its behalf, affecting an individual or group of individuals.’
- 1.5 An individual should not have to use the word ‘complaint’ for it to be treated as such. A complaint that is submitted via a third party or representative should still be handled in line with the organisation’s complaints policy.
- 1.6 Organisations should recognise the difference between a service request and a complaint. This should be set out in their complaints policy.
- 1.7 Service requests are not complaints but may contain expressions of dissatisfaction. Organisations should have the opportunity to deal with a service request before a complaint is made. A complaint may be raised when the individual expresses dissatisfaction with the response to their service request, even if the handling of the service request remains ongoing. An organisation should not stop its efforts to address the service request if the individual complains.
- 1.8 Service requests should be recorded, monitored and reviewed regularly.

2. Exclusions

- 2.1 An organisation should accept a complaint unless there is a valid reason not to do so. If the organisation decides not to accept a complaint, it should be able to evidence its reasoning. Each complaint should be considered on its own merits.
- 2.2 Organisations should accept complaints referred to them within 12 months of the issue occurring, or the individual becoming aware of the issue. Organisations should consider whether to apply discretion to accept complaints made outside this time limit where there are good reasons to do so.
- 2.3 A complaints policy should set out the circumstances in which a matter might not be considered or escalated. Organisations should ensure that these are reasonable, and should not deny individuals access to redress.
- 2.4 If an organisation decides not to accept a complaint, an explanation should be provided to the individual setting out the reasons why the matter is not suitable for the complaints process and the right to take that decision to the Ombudsman.
- 2.5 Organisations should not take a blanket approach to excluding complaints; they should consider the individual circumstances of each complaint.

3. Accessibility and awareness

- 3.1 Organisations should make it easy for individuals to complain by providing different channels through which they can make a complaint. Organisations must consider their duties under the Equality Act 2010 and anticipate the needs and reasonable adjustments of individuals who may need to access the complaints process.
- 3.2 Individuals should be able to raise their complaints in any way and with any member of staff. All staff should be aware of the complaints process and be able to pass details of the complaint to the appropriate person within the organisation.
- 3.3 High volumes of complaints should not be seen as a negative, as they can be indicative of a well-publicised and accessible complaints process. Low complaint volumes are potentially a sign that individuals are unable to complain.
- 3.4 Organisations should make their complaint policy available in a clear and accessible format for all individuals. This should detail the process, what will happen at each stage, and the timeframes for responding. The policy should also be published on the organisation's website.
- 3.5 The policy should explain how the organisation will publicise details of the complaints policy, including information about the Ombudsman and this Code.
- 3.6 Organisations should give individuals the opportunity to have a suitable representative deal with their complaint on their behalf, and to be represented or accompanied at any meeting with the organisation.
- 3.7 Organisations should provide individuals with information on their right to access the Ombudsman service and how the individual can engage with the Ombudsman about their complaint.
- 3.8 Where an organisation asks for feedback about its services through a survey, it should provide details of how individuals can complain so they can pursue any dissatisfaction if they so wish.

4. Complaint handling resources

- 4.1 Organisations should have designated, sufficient resource assigned to take responsibility for complaint handling, including liaison with the relevant Ombudsman and ensuring complaints are reported to the governing body (or equivalent).
- 4.2 Anyone responding to a complaint should have access to staff at all levels to facilitate the prompt resolution of complaints. They should also have the authority and autonomy to act to resolve disputes promptly and fairly.
- 4.3 Organisations are expected to prioritise complaint handling and a culture of learning from complaints. All relevant staff should be suitably trained in the importance of complaint handling. It is important that complaints are seen as a core service and resourced accordingly

5. The complaint handling process

- 5.1 Organisations should have a single policy for dealing with complaints covered by the Code.
- 5.2 The early and local resolution of issues between organisations and individuals is key to effective complaint handling. Organisations should not have extra named stages (such as 'stage 0' or 'informal complaint') as this causes unnecessary confusion.
- 5.3 When an individual expresses dissatisfaction that could meet the criteria for a complaint as set out in section 1 of the Code, they should be given the opportunity to make a complaint. Organisations should recognise that individuals may be reluctant to raise complaints out of fear it may impact services they receive in future. .
- 5.4 The person responding to the complaint should:
- clarify with the individual any aspects of the complaint they are unclear about;
 - deal with complaints on their merits, act independently, and have an open mind;
 - give the individual a fair chance to set out their position;
 - take measures to address any actual or perceived conflict of interest; and
 - consider all relevant information and evidence carefully.
- 5.5 Where a response to a complaint will fall outside the timescales set out in this Code the organisation should inform the individual of when the response will be provided and the reason(s) for the delay.
- 5.6 Organisations must make reasonable adjustments for individuals where appropriate under the Equality Act 2010.
- Organisations should keep a record of any reasonable adjustments agreed. Any agreed reasonable adjustments should be kept under active review.
- 5.7 Organisations should not refuse to escalate a complaint through all stages of the complaints procedure unless there are valid reasons to do so. Organisations should clearly set out these reasons, and they should align with the approach to exclusions set out in section 2 of the Code.
- 5.8 A full record should be kept of the complaint, and the outcomes at each stage. This should include the original complaint and the date received, all correspondence with the individual, correspondence with other parties, and any relevant supporting documentation such as reports. This should be retained in line with the organisation's data retention policies.
- 5.9 Organisations should have systems in place to ensure that a complaint can be remedied at any stage of its complaints process. Organisations should ensure that appropriate remedies can be provided at any stage of the complaints process without the need for escalation to stage 2 or the Ombudsman.
- 5.10 Organisations should have policies and procedures in place for managing unacceptable behaviour from individuals and/or their representatives. Organisations should be able to evidence reasons for putting any restrictions in place and should keep an individual's restrictions under regular review.
- 5.11 Any restrictions placed on an individual's contact due to unacceptable behaviour should be proportionate and demonstrate regard for the provisions of the Equality Act 2010.

6. Complaints stages

Stage 1

- 6.1 Organisations should have processes in place to consider which complaints can be responded to as early as possible, and which require further consideration. Organisations should consider factors such as the complexity of the complaint and whether the individual is vulnerable or at risk. Most stage 1 complaints can be resolved promptly, and an explanation, apology or resolution provided to the individual.
- 6.2 Complaints should be acknowledged, and logged at stage 1 of the complaints procedure **within five working days of the complaint being received**.
- 6.3 Organisations should provide a full response to stage 1 complaints **within 10 working days** of the complaint being acknowledged.
- 6.4 Organisations should decide whether an extension to this timescale is needed when considering the complexity of the complaint and then inform individuals of the expected timescale for response. Any extension should be no more than 10 working days without good reason, and the reason(s) should be clearly explained to the individual.
- 6.5 When an organisation informs an individual about an extension to these timescales, they should be provided with the details of the relevant Ombudsman.
- 6.6 A complaint response should be provided to the individual when the answer to the complaint is known, not when the outstanding actions required to address the issue are completed. Outstanding actions should still be tracked and actioned promptly, with appropriate updates provided to the individual.
- 6.7 Organisations should address all points raised in the complaint and provide clear reasons for any decisions, referencing the relevant policy, law and good practice where appropriate. Organisations should be clear which aspects of the complaint they are, and are not, responsible for and clarify any areas where this is not clear.
- 6.8 At the conclusion of stage 1 organisations should provide details of how to escalate the matter to stage 2 if the individual is not satisfied with the response.
- 6.9 Where individuals raise additional complaints during stage 1, these should be incorporated into the stage 1 response if they are related, and the stage 1 response has not been provided. Where the stage 1 response has been provided, the new issues are unrelated to the issues already being considered, or it would unreasonably delay the response, the new issues should be logged as a new complaint.
- 6.10 Organisations should have systems in place to ensure that a complaint can be remedied at any stage of its complaints process. Individuals should not have to escalate a complaint in order to get an appropriate remedy.

Stage 2

- 6.11 If all or part of the complaint is not resolved to the individual's satisfaction at stage 1, it should be progressed to stage 2 of the organisation's procedure. Stage 2 is the organisation's final response..
- 6.12 Requests for stage 2 should be acknowledged and logged at stage 2 of the complaints procedure within **five working days of the escalation request being received**. Within the acknowledgement, organisations should set out their understanding of any outstanding issues and the outcomes the individual is seeking. If any aspect of the complaint is unclear, the individual should be asked for clarification.
- 6.13 Individuals should not be required to explain their reasons for requesting a stage 2 consideration. Organisations should make reasonable efforts to understand why an individual remains unhappy as part of its stage 2 response.
- 6.14 The person considering the complaint at stage 2 should not be the same person that considered the complaint at stage 1.
- 6.15 Organisations should issue a final response to the stage 2 **within 20 working days** of the complaint being acknowledged.
- 6.16 Organisations should decide whether an extension to this timescale is needed when considering the complexity of the complaint and then inform individuals of the expected timescale for response. Any extension should be no more than 20 working days without good reason, and the reason(s) should be clearly explained to the individual.
- 6.17 When an organisation informs an individual about an extension to these timescales they should be provided with the details of the relevant Ombudsman.
- 6.18 Organisations should confirm the following in writing to the individual at the completion of stage 2 in clear, plain language:
- a. the complaint stage;
 - b. the organisation's understanding of the complaint;
 - c. the decision on the complaint;
 - d. the reasons for any decisions made;
 - e. the details of any remedy offered to put things right;
 - f. details of any outstanding actions; and
 - g. details of how to escalate the matter to the Ombudsman if the individual remains dissatisfied.
- 6.19 Stage 2 should be the organisation's final response and should involve all suitable staff members needed to issue such a response.
- 6.20 A process with more than two stages will make the complaint process unduly long and delay access to the relevant Ombudsman. A process with a single stage means the organisation may lack the ability to check its response before an individual comes to the Ombudsman.
- 6.21 Where an organisation's complaint response is handled by a third party (e.g. a contractor) or independent adjudicator at any stage, it should form part of the two stage complaints process set out in this Code. Individuals should not be expected to go through two complaints processes.
- 6.22 Organisations are responsible for ensuring that any third parties handle complaints in line with the Code.

7. Putting things right

7.1 Where something has gone wrong an organisation should acknowledge this and set out the actions it has already taken, or intends to take, to put things right. These can include:

- > Apologising;
- > Acknowledging where things have gone wrong;
- > Providing an explanation, assistance or reasons;
- > Taking action if there has been delay;
- > Reconsidering or changing a decision;
- > Amending a record or adding a correction or addendum;
- > Providing a financial remedy;
- > Changing policies, procedures or practices.

7.2 Any remedy offered should reflect the impact on the individual as a result of any fault identified.

7.3 The remedy offer should clearly set out what will happen and by when, in agreement with the individual where appropriate. Any remedy proposed should be followed through to completion.

7.4 If a proposed remedy cannot be delivered, the individual should be informed of the reasons for this, provided with details of any alternative remedy and reminded of their right to complain to the Ombudsman,

7.5 Organisations should take account of the good practice guides issued by the Ombudsman when deciding on appropriate remedies.

8. Performance reporting and self-assessment

- 8.1 Organisations should produce an annual complaints performance and service improvement report for scrutiny and challenge, which should include:
- a. an annual self-assessment against this Code to ensure its complaint handling policy remains in line with its requirements.
 - b. a qualitative and quantitative analysis of the organisation's complaint handling performance. This should also include a summary of the types of complaints the organisation has refused to accept;
 - c. any findings of non-compliance with this Code;
 - d. the service improvements made as a result of the learning from complaints;
 - e. the annual letter about the organisation's performance from the Ombudsman; and
 - f. any other relevant reports or publications produced by the Ombudsman in relation to the work of the organisation.
- 8.2 The annual complaints performance and service improvement report should be reported through the organisation's governance arrangements and published on the section of its website relating to complaints. The response to the report from the relevant governance arrangement should be published alongside this.
- 8.3 Organisations should also carry out a self-assessment following a significant restructure, merger and/or change in procedures.

9. Scrutiny & oversight: continuous learning and improvement

- 9.1 Organisations should look beyond the circumstances of the individual complaint and consider whether service improvements can be made as a result of any learning from the complaint.
- 9.2 A positive complaint handling culture is important to the effectiveness with which organisations resolve disputes. Organisations should use complaints as a source of intelligence to identify issues and introduce positive changes in service delivery.
- 9.3 Accountability and transparency are also integral to a positive organisational culture. Organisations should report back on wider learning and improvements from complaints to stakeholders, such as citizens' panels, staff and relevant committees.
- 9.4 The organisation should appoint a suitably senior person to oversee its complaint handling performance. This person should assess any themes or trends to identify potential systemic issues, serious risks, or policies and procedures that require revision.
- 9.5 In addition to this, organisations should assign lead responsibility for complaints in governance arrangements to support a positive complaint handling culture. We refer to this as the 'Member Responsible for Complaints' (the Member). This role could be carried out by an individual or committee depending on the governance arrangements in place.
- 9.6 The Member should receive regular information on complaints that provides insight on the organisation's complaint handling performance. The Member should have access to suitable information and staff to perform this role and report on their findings.
- 9.7 As a minimum, the Member should receive:
 - a. regular updates on the volume, categories, and outcomes of complaints, alongside complaint handling performance
 - b. regular reviews of issues and trends arising from complaint handling; and
 - c. the annual complaints performance and service improvement report.
- 9.8 Organisations should have a standard objective in relation to complaint handling for all relevant employees or third parties that reflects the need to:
 - > have a collaborative and co-operative approach towards resolving complaints, working with colleagues across teams and departments;
 - > take collective responsibility for any shortfalls identified through complaints, rather than blaming others; and
 - > act within the professional standards for engaging with complaints as set by any relevant professional body.

Appendix A: Self-assessment

A self-assessment should be completed and shared with the organisation's governance arrangements as part of the complaints performance and service improvement report.

Evidence should show how the organisation follows the Code and its own policies. It should also set out how well it is performing and provide information about service improvements which have been implemented following complaints.

For example, this could include records of quality assurance checks on complaint responses, exclusions and feedback from relevant staff. If the failure to meet an expectation only relates to one service area or department this should be made clear.

When completing the self-assessment, organisations should not focus on the number of complaints received. Recording a high number of complaints may be an indication that the organisation welcomes complaints and that individuals are able to access the complaints process easily. Organisations should focus on timescales for responding to complaints and complaint outcomes.

A suggested self-assessment format is included here, but organisations may adopt their own version to meet local needs and reporting requirements.

Example: Self-assessment against the requirements of the Code

Code section	Action	Do we follow the code Yes/No	Explanations and Commentary
1: Definition of a service request and complaint	We recognise the difference between a service request and a complaint and these are defined in our policies and procedures.		
2: Exclusions	Our complaints policy sets out circumstances where we would not consider a complaint. These are reasonable and do not deny individuals access to redress.		
3: Accessibility and awareness	We provide different channels through which individuals can make complaints. These are accessible and we are able to make reasonable adjustments where necessary.		
4: Complaint handling resources	We have designated, sufficient resource assigned to take responsibility for complaint handling. Complaints are viewed as a core service and resourced accordingly.		

Code section	Action	Do we follow the code Yes/No	Explanations and Commentary
5: The complaint handling process	We have a single policy for dealing with complaints covered by the Code and individuals are given the option of raising a complaint where they express dissatisfaction that meets the definition of the complaint in our policy.		
6: Complaints stages (Stage 1)	We process stage 1 complaints in line with timescales and processes set out in the Code.		
6: Complaints stages (Stage 2)	We process stage 2 complaints in line with timescales and processes set out in the Code.		
7: Putting things right	When something has gone wrong we take action to put things right.		
8: Performance reporting and self-assessment	We produce an annual complaints performance and service improvement report for scrutiny and challenge which includes a self-assessment against the Code.		
9: Scrutiny & Oversight	We have appropriate senior leadership and governance oversight of the complaints process and performance.		

Local Government and Social Care Ombudsman

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OVERVIEW AND SCRUTINY BOARD



Report subject	Blue Badge Update
Meeting date	12 May 2025
Status	Public Report
Executive summary	This report provides an update on the recommended actions made in relation to the Informal working group report update submitted to Corporate and Community Overview and Scrutiny Committee on 21 October 2024.
Recommendations	<p>It is RECOMMENDED that:</p> <p>(a) The updates in this report are noted.</p> <p>(b) The Overview and Scrutiny Board provide any further comment</p>
Reason for recommendations	To ensure O&S are aware of the current performance of the blue badge service and actions taken to maintain performance.

Portfolio Holder(s):	Councillor Andy Martin
Corporate Director	Matti Raudsepp, Director Customer & Property
Report Authors	Stuart Walters, Customer Services Manager
Wards	Council Wide
Classification	For Update

Background

At its meeting on 21 October 2024, Overview and Scrutiny Board discussed the blue badge service and the following actions were recommended:

- a. The Portfolio Holder/Leader and the Chief Executive be asked to write to the Department for Transport to raise the concerns outlined by the O&S Board in relation to fee setting restrictions, and that the Portfolio Holder take the issue forward with local MPs and the Local Government Association. The Board sought to encourage local authorities to raise these issues with the Department for Transport and request that central government gives local authorities the freedom to set fees which cover the cost of administering the system and that the system should be simplified in terms of renewal processes.
- b. A further update be brought back to the Board in approximately 6 months.

Update

2. In relation to recommendation A, the Department for Transport were contacted by the Portfolio Holder.
- 2.1 Lilian Greenwood MP, Minister for the Future of Roads, responded to the Portfolio Holder on the 25 November 2024, advising the following: [Appendix 1]
- 2.2 The Department for Transport is responsible for legislation and governance of the scheme in England, with day to-day administration of the scheme remaining within the responsibility of local authorities.
- 2.3 The Department does provide non-statutory guidance to local authorities to assist them in administering the scheme but generally the procedures adopted are for local authorities to determine within the governing legislation.
- 2.4 No timescales are set for administering applications other than a suggested guideline that issuing authorities should aim to complete end to end applications within 12 weeks.
- 2.5 There are no current plans to review the maximum fee that local authorities in England can charge for each Blue Badge issued.
- 2.6 In addition to the letter written to the Department for Transport, Sir Christopher Chope MP submitted a written question on the 11 December 2024 to the Secretary of State for Transport. The question asked *if she will make it her policy that local*

authorities issuing Blue Badges within her Department's guideline timescale of 12 weeks will be able to recover the full costs of delivering that service.

- 2.7 Lilian Greenwood MP, Minister for the Future of Roads responded, as below, on the 16 December 2024.
- 2.8 The Blue Badge scheme is administered, funded and operated at local level by individual local authorities. There are no timescales set for administering applications other than a suggested guideline that issuing authorities should aim to complete end to end applications within 12 weeks.
- 2.9 In England local authorities are legally entitled to charge a fee of up to £10 for each badge issued which allows them to recover some of the costs involved in administering the scheme. The Department has no plans to amend legislation
3. In relation to recommendation B, there is the following update.
- 3.1 As of 23 April 2025, there are 22,410 Blue Badges on issue within the BCP Council area, an increase of 7% since October 2024.
- 3.2 New and 'renewal' applications were taking approximately 14 weeks for a decision to be issued when last reported to the board in October 2024.
- 3.3 As of 23 April 2025, decisions on new and 'renewal' applications are taking between 6 to 7 weeks.
- 3.4 The improvement in decision making time is due to the following changes:
- Creation and recruitment of an apprenticeship role to assist the processing team.
 - Implementation of pre-assessment screening to ensure applicants were informed of any missing or inadequate evidence before assessment commences.
 - Letter / Email templates reviewed and enhanced to reduce need for editing.
 - Implementation of a new work assignment plan.
 - Temporary assignment of officers to the blue badge processing team from within the wider customer service team.
 - Blue badge assessment officers undertaking overtime.
 - Access to Adult Social Care database to enable eligibility checks.
 - Increase in the number of customer service staff trained to handle blue badge enquiries, including payments.
- 3.5 The blue badge service lead officer visited colleagues in Dorset Council to understand their approach to application assessment and ways of working.
- 3.6 It was a useful visit that has prompted further changes in the ways of working and assessment as set out below.
- 3.7 To maintain the current level of service the service lead officer made further additional changes at the beginning of April 2025.
- Introduction of an eligibility scoring matrix, use of the matrix by the processing team will:
 - Enable faster assessments
 - Ensure all applications are assessed consistently

- Provide a reference for any challenge post application decision.
 - Enablement of the 'not for reassessment' flag within the blue badge system to reduce the evidence required for those applicants reapplying with a progressive condition.
- 3.8 The service will continue to advise applicants that new and renewal applications may take up to 12 weeks for a decision to be made. This message will only be amended if decision making time exceeds the 12 weeks, which it is not expected to do.
- 3.9 The service is confident that the changes implemented over the past 6 months will allow the ongoing decision-making time of between 6 to 7 weeks.

Summary of financial implications

4. The Apprentice post has been created to bring additional capacity to the process. This has been delivered within the Customer Services budget with no additional budget requirement.

Summary of legal implications

5. There are no legal implications connected with this update.

Summary of human resources implications

6. There are no human resources implications connected with this update.

Summary of sustainability impact

7. There is no sustainability implications connected with this update.

Summary of public health implications

8. There is no public health implication connected with this update

Summary of equality implications

9. There are no changes connected with this update which require an equalities impact assessment.

Summary of risk assessment

10. N/A

Background papers

None

Appendices

Letter from Minister for Future Roads



Department for Transport

Councillor Andy Martin
Cabinet Member for Customer, Communications &
Culture, BCP Council
Leader's Office, BCP Civic Centre
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From the Parliamentary
Under Secretary of State
Lilian Greenwood MP

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Our Ref: MC/00027142

25 November 2024

Dear Councillor Martin,

Thank you for your letter of 15 November to the Secretary of State about the Blue Badge scheme. I am responding as the Minister for the Future of Roads.

I acknowledge the concerns you raise, all feedback on the scheme is welcomed as it assists the Department to understand how the scheme is working in practice and where improvements can be made to ensure the scheme works in the best possible way for everyone that needs to use it.

It may also be helpful to understand that whilst the Department for Transport is responsible for legislation and governance of the scheme in England, day-to-day administration of the scheme remains the responsibility of the local authorities. The Department does provide non-statutory guidance to local authorities to assist them in administering the scheme but generally the procedures adopted are for local authorities to determine within the governing legislation.

In addition, the Department also delivers a nationwide Blue Badge Digital Service (BBDS) with an online application facility for applicants and a badge management service for local authority administrators. The online application process is designed so that only the relevant sections need to be completed and the applicant is guided through the process dependent upon their responses to each question. The BBDS also provides local authorities with the option to mark cases as not needing an 'evidence review' where it is considered that a person's circumstances will not improve. This means that future applications can be assessed without the necessity for the applicant to provide evidence previously submitted ensuring an easier and less time-consuming process.

I can confirm however, that no timescales are set for administering applications other than a suggested guideline that issuing authorities should aim to complete end to end applications within 12 weeks. It is for each local authority to decide if they wish to send out a re-application reminder either by email or via their website.

The Department works closely with all local authorities that administer the scheme locally, including seeking information on the costs of delivering the scheme. One of the ways we do this is by asking local authorities to provide us with up-to-date costs on a quarterly basis through an online survey. We encourage all authorities to complete the quarterly survey to enable strategic decision making about how the Blue Badge scheme in England works for both citizen users and local authorities. There are no current plans to review the maximum fee that local authorities in England can charge for each Blue Badge issued.

Each local authority is responsible for administering the scheme locally and for its own service standards, including responding to any criticism of its service standards.

I hope I have helped clarify where responsibilities lie and the role of the local authority in processing applications using the Blue Badge Digital Service.

Best wishes,

A handwritten signature in blue ink, appearing to read 'Lilian', with a long horizontal stroke extending to the right.

LILIAN GREENWOOD MP

MINISTER FOR THE FUTURE OF ROADS

OVERVIEW AND SCRUTINY BOARD



Report subject	Arts and Culture Funding
Meeting date	12 May 2025
Status	Public Report
Executive summary	This provides information on the Arts Council England National Portfolio Organisations which BCP Council supports. The report provides information on their funding, objectives and details the important link between culture, health and wellbeing in line with the corporate strategy.
Recommendations	<p>It is RECOMMENDED that:</p> <p>a. Overview and scrutiny note the information contained within the report.</p>
Reason for recommendations	This report is for information

Portfolio Holder(s):	Councillor Andy Martin – Portfolio Holder for Customer, Communications and Culture
Corporate Director	Glynn Barton – Chief Operations Officer
Report Authors	Amanda Barrie – Director of Commercial Operations Helen Wildman – Head of Leisure & Events
Wards	Council-wide
Classification	For Information

Background

1. The Cultural Development Team sits within the Commercial Operations Directorate under Leisure & Events. This team manage the Arts by the Sea Festival, work with cultural partners and communities delivering cultural projects and are delivering part of the levelling up funded work, installing 11 art installations across coastal locations.
2. BCP Council contribute to the funding of 7 Arts Council England National Portfolio Organisations (NPO's). Two of these are BCP Council led, the Arts by the Sea Festival and Poole Museum. The remaining 5 NPO's sit outside of the council and are run by external organisations.
3. The management of the external NPO's relationship recently moved across to the Commercial Operations Directorate in order to join up the cultural approach moving forward.
4. NPO's are recognised and funded by Arts Council England as leaders in the arts and cultural sector. There are currently 985 NPO's receiving committed funding across the country.
5. For the Arts Council to invest NPO's need to demonstrate they are engaging communities, collaborating with others and producing high quality work that engages people along with meeting their Arts Council Investment Principles.
6. In 23/24 Arts Council England invested £5.3 million into the BCP area, representing 9% of their total South-West Budget.
7. The current NPO funding period runs from April 2023 – March 2028.

National Portfolio Organisations (NPO's) with council funding

8. The table below shows the breakdown of the current position of funding for NPO's alongside the organisations vision and objectives.

Table 1 – External NPO organisations with council funding

NPO organisation	BCP Council annual grant	Arts Council funding	NPO Vision & objectives
Lighthouse Poole (Poole Arts Trust)	£387,900	£354,000	<p>Vision - A nationally significant and regionally important multi-arts venue, that is one of the cultural gems of Dorset, at the heart of our community and locally loved. A dynamic, vibrant place where people feel inspired, entertained, welcomed, and where artists and performers feel supported and empowered to do their best work.</p> <p>Mission To provide the community of Poole and the wider region with a vibrant, diverse and relevant cultural programme of live performances, film, engagement and participation, that entertains, moves, surprises, and challenges our audiences through an ever-changing programme, which stretches, and challenges our audiences through an ever-changing programme, which stretches from the popular and familiar to the eclectic and innovative, reflecting and respecting the breadth of their interests and their trust in us.</p>
Bournemouth Symphony Orchestra	£246,348	£2,554,790	<p>Mission – BSO exists to bring music into people’s lives to make a Happier, Healthier and Fairer Society</p> <p>Vision - The BSO’s vision is to be the model of a 21st century orchestra, enhancing lives through the power of music</p> <p>Objectives Delivering a high-quality, diverse and distinctive programme of work Challenging barriers to the access of high-quality music Demonstrative the empowering impact of music on people’s lives Celebrating high-quality music and talent Nurturing lifelong relationships with stakeholders through strong and resilient collaboration</p>

Pavilion Dance Southwest	£102,600	£386,216	<p>Vision - A world in which dance is celebrated as an integral part of life.</p> <p>Mission - Transforming communities through dance by opening doors, deepening connections and embracing diversity</p> <p>Objectives Deepen our impact locally, delivering empowering dance experiences for people across Bournemouth, Christchurch and Poole Strengthen our national sector leadership role through collaboration and partnership Nurture an inclusive, sustainable and resilient organisation Transform our regional role to focus on supporting artists and the development of dance in the South West</p>
Hampshire Cultural Trust (Red House Museum, Christchurch)	£90,000	£500,000	<p>Vision - To create inspirational cultural experiences in Hampshire that enrich and transform lives.</p> <p>Objectives To provide high-quality programmes and venues that engage diverse audiences and inspire local pride To improve wellbeing, health, and happiness through cultural experiences To deliver a sustainable future for culture in Hampshire, contributing to the local economy and building stronger communities To create fulfilling employment and volunteering opportunities through culture</p>
Activate Performing Arts (Inside Out Dorset Festival)	£11,700	£251,422	<p>Vision - Extraordinary moments connect and uplift us all: we create opportunities for everyone through the performing arts.</p> <p>Objectives Extraordinary events in extraordinary places Community engagement programme Co-programming pilot Schools engagement programme Children and young peoples' engagement programme Talent development programme Touring and co-presenting programme Strategic engagement programme International partnerships</p>

9. Annual partnership agreements are put in place each year with the NPO's laying out the organisations' vision and objectives. The agreements also set out the activities that the NPO's will deliver and provide key metrics and data analytics for performance and delivery. Each activity aligns with the aims and objectives of BCP Council Corporate and Cultural Strategies.
10. The work that the NPO's carry out align closely with the Council's Corporate Strategy including
 - Our Place and Environment – vibrant places where people and nature flourish with a thriving economy in a healthy natural environment.
 - Our People and Communities – everyone leads a fulfilled life maximising opportunity for all.
11. Partnership meetings take place throughout the funding period. Introduction meetings are underway now the partnerships have moved to Commercial Operations. Quarterly reviews will be held thereafter to monitor progress against objectives.
12. Regular meetings also take place with the Portfolio Holder for Customer, Communications and Culture and individual NPO's, jointly with the Arts Council England and through the Cultural Compact.
13. Cultural activity creates a range of positive benefits to residents' lives including personal fulfilment, community cohesion, employment opportunities, skills development, revitalised high streets, economic benefit and positive mental health and wellbeing.
14. The health and wellbeing links to cultural activities is explored further in the public health implications section of this paper.
15. The council's vision in the Cultural Strategy 2023-2032 focusses on three key development goals:
 - Talent - Attracting, developing and retaining diverse talent, making BCP a place for people to build high quality creative careers or develop creative skills. Embracing creative education, developing a skilled workforce, championing diverse cultural expression and enabling people of all backgrounds to actively participate in the cultural life of the region.
 - Infrastructure - Developing networks and spaces, both physical and digital, to experiment, make, share and present accessible creative work. Building cultural capacity by using the excellence of existing hubs, venues and organisations, developing key new ones and boosting the region as a place that produces and hosts great art and culture of international significance.
 - Place - Strengthening connections between communities and the places in which we live, work, learn and play, breaking down barriers to creation and participation. Embedding culture in planning and place-making with a focus on nurturing distinctive neighbourhoods, dynamic town centres, accessible and imaginative public spaces, urban mobility and an attention to social cohesion, health and wellbeing and environmental sustainability

16. The work of the NPO's aligns with the development goals in the Cultural Strategy, delivering activity with a focus on one or more ambition to support talent development, engage communities, maximise the effective use of the conurbation's venues, create vibrant town centres, provide accessible cultural opportunities for people of all demographics, remove barriers to engagement and positively impact the health and wellbeing of BCP residents.
17. Arts Council England's vision of 'Lets Create' also closely align with those articulated in both the council's Cultural and Corporate strategies.
18. Arts Council England will only support funding in areas where there is political support for culture. BCP Council have consistently demonstrated this with continued investment in NPO's in the area and this has been supported by significant investment in culture by Arts Council England, as well as by other funders and donors.
19. Due to the support from BCP Council, Arts Council England currently provide over £4 million of annual funding to the NPO's across Bournemouth, Christchurch and Poole.
20. Arts Council England have recently announced they are pausing the launch of their next National Portfolio Investment Programme which was due to be launched in April and are recommending to Government that their current National Portfolio extends to 31 March 2028, instead of the anticipated end date of March 2027.
21. This is due to the Government's imminent spending review, the Government's independent review of the Arts Council and the Devolution White Paper.
22. The risks of any future reduction in funding are explored within the risk assessment section of the paper.
23. The Cultural Compact works to support the development of arts, heritage, and creative industries, ensuring that culture plays a central role in shaping the conurbation's future success and the wellbeing of all its residents. Set up in 2020 with funding from Arts Council England and BCP Council, the Cultural Compact works to deliver the region's aspiration for the cultural and creative sector. By acting as a broker, connector and champion for BCP's creative communities, the Cultural Compact aims to enable a step-change in the capacity of Bournemouth Christchurch and Poole's creative sector over the next two years, positioning themselves to bid for significant cross-conurbation funding such as the Arts Council's Place Partnership Fund.
24. The Cultural Compact task group is made up of representatives from Pavilion Dance, Lighthouse, BSO, Activate, Arts University Bournemouth, Bournemouth University, Bournemouth Town Centre BID and BCP Council. Each has an area to lead on & delivery targets to meet over next 2 years. By the culmination of the plan in early 2027, the Cultural Compact will have run a series of Creative Health Facilitated Conversations, set up and run regular cultural network gatherings around specific topics of interest, drafted strategic documents in dialogue with BCP Council, secured funding for a Bournemouth Town Centre pilot project, run a series of workshops for the creative sector by access & inclusion and environmental sustainability experts, created and delivered an Economic Impact Report, connected education settings and cultural networks, and connected heritage assets to tourism and visitor organisations and networks.

Impact of NPO's work across BCP

25. The impact of the NPO's work across BCP was measured in 2019/20 which showed 633,000 attendees across indoor and outdoor events, engaging over 90,000 children and providing employment for 180 permanent staff, 57 casual staff and 592 freelancers.
26. The external NPO's with council funding invest in community engagement and talent development and some of these initiatives are detailed below in points 27 – 31.
27. Lighthouse
 - hosted 80 live performances in 24/25 reaching 57,000 people
 - hosts a programme of pre and post-show talks, masterclasses, workshops connected to received productions.
 - hosts creative sessions for young people as part of the Creative Engagement Programme with partner schools
 - audio described, captioned and dementia friendly performances and autism friendly performances of pantomime
28. Bournemouth Symphony Orchestra
 - host of the internationally acclaimed disabled-led ensemble BSO Resound
 - hosts dementia friendly events and bring live music into care homes (25 care home events 24/25)
 - undertakes a schools' participation programme with 37 BCP schools
 - delivered 77 participant events with over 10,000 attendees in 24/25
29. Pavilion Dance South-West
 - host regular parkinsons and dementia dance classes
 - work with Public Health to deliver a range of workshops and sessions for children and young people based on physical and mental health outcomes
 - mentor an annual cohort of young choreographers
 - partners with the AUB dance degree
30. Hampshire Cultural Trust
 - host the Stepping Stones programme which works in partnership with Hampshire Child and Adolescent Mental Health Service to support young people's mental health
 - hosts the Brighter Futures programme working with wellbeing centres, care providers and social prescribing networks to provide workshops and courses.
31. Activate
 - host The Remix – an inclusive youth performance company for disabled and non-disabled 12-17 year olds
 - host Dorset Youth Dance – weekly classes for young people of all abilities

Summary of financial implications

32. The council funding for the NPO's is detailed in the council's medium term financial plan (MTFP) which was agreed at full council in February 2025.
33. The total annual council funding for external NPO's is £838,548.
34. The council funding for the Arts by the Sea Festival NPO has been removed from the budget from 26/27 through the budget setting process and savings identified.

Summary of legal implications

35. There are no legal implications directly arising from this report.
36. Funding agreements between the Council and NPOs outline key activities and targets, managed through partnerships to align with the Council's Corporate Strategy.

Summary of human resources implications

37. Staff resource is in place to support the partnership working for the NPO's.

Summary of sustainability impact

38. The NPO's work within their individual organisations on the sustainability impact for their activities.
39. An example of this is the Lighthouse's work set out specific plans that will push the Lighthouse towards a net zero by 2030 as detailed in their annual impact report.

Summary of public health implications

40. It is widely recognised and researched that culture promotes health and wellbeing known as 'creative health'. This is supported through the Arts Council England's Lets Create Strategy 2020-2030 and the social prescribing benefits from culture. Further work in this field is ongoing with the NHS, Arts Council England, Cultural, Health and Wellbeing Alliance and All Party Parliamentary Group for Arts. Creative Health can contribute to the prevention of ill-health, promotion of healthy behaviours, management of long-term conditions, and treatment and recovery across the life course.
41. Cultural organisations are well placed to secure Public Health funding for their activities which deliver on health and wellbeing benefits.
42. As an example, Pavilion Dance South West have obtained a grant from Public Health for £11,400 to support their dance programmes for children and young people to boost physical activity and emotional health and wellbeing. This will be delivered through weekly creative dance classes for 3 age groups between 0-13 years, a youth dance company for 14-19 years, after school dance and counselling sessions in partnership with Dorset MIND, weekly street dance classes in West Howe and a school's programme delivered via 7 formal partnerships with schools across BCP and one-off projects in at least 4 more. This programme contributes to the Public Health Joint Forward Plan Pillar Outcomes 1 (improve the lives of 100,000 people impacted by poor mental health) and 2 (prevent 55,000 children from becoming overweight by 2040).

Summary of equality implications

43. An EIA has not been completed for this report as there is no change to the funding or service provided.

Summary of risk assessment

Risks	Level	Mitigations
Devolution	Medium	
Financial - Government review on spending resulting in a change in available Arts Council funding	Medium	Ongoing partnership working with cultural partners and Arts Council England
Reputational – Reduction in Council funding	Medium	Continued support and partnership work with NPO's
Reputational – NPO's not delivering on objectives	Low	Funding agreements put in place each year with regular partnership meetings.
Reputational – No or limited cultural provision in our communities and town centres will limit their future growth	Medium	Continued work with NPO organisations

Background papers

[Bournemouth-Christchurch-and-Poole-Cultural-Strategy](#)

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CABINET



Report subject	Medium Term Financial Plan (MTFP) Update
Meeting date	13 May 2025
Status	Public Report
Executive summary	<p>This report:</p> <ul style="list-style-type: none"> • Presents an update on Local Government Funding Reforms and the government Spring Statement. • Aims to ensure the council presents a legally balanced 2026/27 budget. • Proposes a budget planning process and timeline for key financial reports. • Proposes a financial strategy to support the delivery of a robust and financially sustainable budget for 2026/27.
Recommendations	<p>It is RECOMMENDED that Cabinet:</p> <ol style="list-style-type: none"> Approve the budget timetable and process as set out in Appendix B. Endorse the scenario planning exercise that guides the potential level of activity that may now be needed to present a legally balance budget for 2026/27. Approve the financial strategy designed to support the ongoing delivery of a balanced 2026/27 Budget and MTFP as set out in Appendix C.
Reason for recommendations	<p>To comply with accounting codes of practice and best practice which requires councils to have a rolling multi-year medium term financial plan.</p> <p>To comply with the Councils Constitution and the requirement to have as a minimum a 3-year Medium Term Financial Plan</p> <p>To provide Cabinet with the latest high-level overview of the medium-term financial plan.</p>

	To present a proposed financial strategy to support the ongoing delivery of a balanced budget for 2026/27.
Portfolio Holder(s):	Cllr. Mike Cox, Portfolio Holder for Finance
Corporate Director	Graham Farrant, Chief Executive
Report Authors	Adam Richens, Director of Finance and Chief Finance Officer adam.richens@bcpcouncil.gov.uk
Wards	Council-wide
Classification	For Decision

Background

1. Council in February 2025 approved a budget for 2025/26 and Medium-Term Financial Plan (MTFP) with the following key features.
 - a) A balanced MTFP over the 3-year period to 31 March 2028 based on conventional local government financial management processes and revenue sources.
 - b) A 4.99% council tax increase for 2025/26 with a financial planning assumption of the same increase in each of the following years consistent with the projections from the Office Budget Responsibility.
 - c) Assumed delivery of £9.6m in annual savings, efficiencies, and additional resources to balance the 2025/26 budget as itemised and supported with individual delivery plans. This was a significant reduction from the £38m assumed in support of the 2024/25 Budget.
 - d) A target of £19m in capital receipts from the disposal of assets to fund the council's transformation programmes over the 2-year period 2024/25 and 2025/26.
 - e) An ongoing request to government to honour their pledge to provide full compensation in respect of their Employers National Insurance increases on staff directly employed by the Council. Since the budget was published analysis by the Local Government Association suggests that over 60% of council tax increases nationally will be consumed by the rise in employers' National Insurance through direct or indirect effects.
2. The approved budget for 2025/26 also managed numerous financial risks. Principle amongst these is the existential threat to the financial viability and sustainability of the Council caused by the accumulated deficit on the Dedicated Schools Grant (DSG). The 2025/26 budget assumed additional temporary borrowing through the Council's Treasury Management powers to fund the excess Special Educational Needs and Disability (SEND) High Needs revenue expenditure above the grant made available by government via the DSG. This shortfall was budgeted to be £57.5m in 2025/26 with the consequential impact that the cumulative DSG deficit is increased from £108m on 31 March 2025 to a predicted £165.5m on 31 March 2026.

This Treasury Management mechanism is only being made available as a temporary solution on the pretext that the government have committed to returning the SEND system to financial sustainability during 2025.

Update: Dedicated Schools Grant – High Needs Expenditure

3. The government have confirmed that they will address the £6bn national special educational needs and disability deficit later this year, with details of the announcement being made as part of the Spending Review in June and the local government finance settlement which they aim to publish in late November. Appearing before the Public Accounts Committee (PAC) on the 3 April 2025, MHCLG's director of local government finance Nico Heslop said 'all options are on the table' but the aim is to increase mainstream delivery for children with SEND and that 'as part of that transition we are working on plans around the DSG deficits.

Local Government Funding Reforms

4. The local government finance policy statement 2025 to 2026 published in November 2024 outlined the intention of the government to progress with funding reforms across local government with a phased implementation beginning with the first year of the multi-year settlement in 2026/27. In advance of this the government published an initial consultation on the objectives and principles of their proposed approach alongside the provisional Local Government Finance Settlement for 2025/26. The council's response to this consultation is included as **Appendix A**.
5. In essence the government are looking to use what they refer to use the best available evidence to assess differences for local government services, including deprivation and resources available to local authorities. It is the last part of this statement that is of most concern as it appears that BCP Council being highly council tax and business rates geared (generates the majority of its net budget funding from these sources) could be a disadvantaged under these reforms. As an example, the government used a very similar approach in distributing the £600m Recovery Grant for 2025/26 and BCP Council received a zero allocation.
6. The reforms were also reflected upon by The Rt Hon Angela Rayner MP in a keynote speech on the 28 February 2025 when in reflecting on the 2025/26 Local Government Finance Settlement she said *"This government is only giving the North what it's owed, and what it deserves. For too long, our outdated system of council funding has been stacked against the north. The days of Ministers expecting the North to go cap in hand ends now. That's why with Jim McMahon, our Minister for English Devolution and Local Government, we are making simpler and clearer structures and will fix the foundations of local government. He is already beginning to replace the funding formula to give the North nearly £840 million more this year. That brings the North's total increase to just over 8 per cent - the biggest rise of all regions in England, by a good distance". "All councils are facing pressures, but it's particularly hard for those that bore the brunt of austerity. And this year's settlement marks a clear direction of travel for the rest of the Parliament"*. This is considered to give a clear statement of intent in respect of the outcome of the LG funding reforms.
7. Early work by a national modelling organisation suggests that BCP Council could see up to a £7.4m per annum reduction in funding from this process. At this stage the MTFP makes no financial planning assumptions relating to the assumed outcome from this process. This is on the grounds that the work remains at an early stage and the council will be lobbying to encourage government not to implement a funding formula that takes local resources, predominately those raised from council tax and

business rates, and redistributes them nationally to authorities with lower council tax levels.

Spring Statement (March 2025)

8. On 25 March 2025 the Chancellor of the Exchequer delivered her Spring Statement which responded to the latest set of forecasts for the economy and public finances from the Office for Budget Responsibility (OBR). The intent of the government is to have only one major fiscal event each year, in the Autumn, followed by a Spring update from the OBR. However, worsening fiscal projections meant the Chancellor had to widen the scope of the spring statement ahead of the June Spending Review. Generally, this was due to increased interest rates, lower growth than anticipated and increased uncertainty. The focus of the statement was on macroeconomic issues, defence, spending reductions in welfare and benefit payments, alongside cuts in Whitehall back-office services.
9. For the council it was disappointing that the Spring Statement did not include anything in respect of the governments previous commitment to return the SEND system to financial sustainability in 2025. It should also be highlighted that although none of the proposed cuts directly affected local government, there is concern about their knock-on impact, particularly where we work in partnership with other public sector agencies, such as NHS trusts. There is also a concern that the reduction in medium-term spending allocations to be detailed in the forthcoming spending review will impact on the sector, either directly, or indirectly.
10. The government is due to present its Spending Review on 11 June 2025.

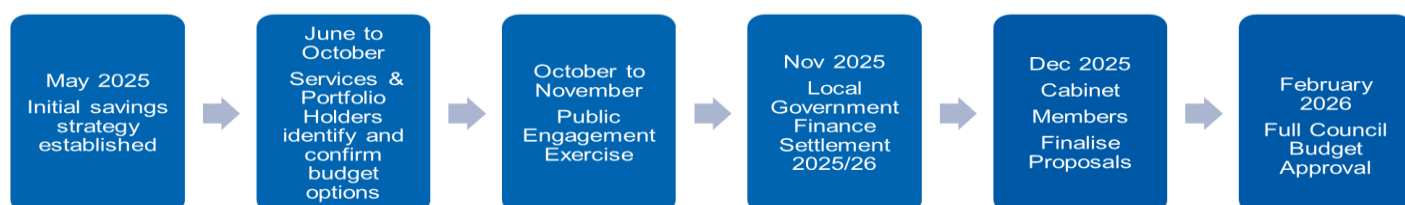
2026/27 Budget Planning Process

11. The budget for 2026/27 and the MTFP should be seen in the context of a rolling, evolving process structured to enable the ongoing proactive management and prioritisation of the council's resources. As a sector local authorities have been grappling with sustained financial pressures since 2010. Recently councils have had to become more efficient in navigating the uncertainty and volatility caused by global macro-economic factors, the legacy and long-term consequences of the Covid-19 pandemic, alongside those caused by the recent cost-of-living crisis, and changes in public policy. Stability in financial planning is impacted by a current financial framework characterised by one-year local government funding settlements. To improve its financial resilience the council does continue to encourage the government to move to multi-year financial settlements. It also looks to continually reflect on the robustness of its strategic and financial risk management to embed and improve arrangements moving forward.
12. Full details of the budget planning process and timetable to support the 2026/27 budget are set out in **Appendix B** attached. Key features include.
 - Consideration of the vision, ambitions and aspirations of the council to ensure the organisation commits its limited resources in accordance with its stated priorities and Corporate Strategy.
 - A scenario planning and financial forecasting led approach.
 - Constant refinement of assumptions based on government announcements, economic forecasts, trend analysis, and professional judgement.

- Public participation in the budget via an engagement process in October/November 2025.
- Two budget workshops, one in November 2025 and then one in January 2026 setting out the final budget proposals.
- Cabinet members working with Corporate Management Board colleagues to shape the proposals via bi-weekly Strategy Planning sessions throughout 2025/26.
- Further to last years enhanced process, it should be highlighted that the process for scrutiny committees' input into the budget remains under consideration.

13. A high-level summary can be shown as set out in Figure 1 below.

Figure 1: High level summary of the 2026/27 budget planning process



Currently approved and rolled Medium Term Financial Plan (MTFP)

14. Figure 2 below sets out the current approved and balanced MTFP to 2028. As a reminder to Cabinet, the table sets out changes in the revenue budgets on an annual basis, either positive numbers which represent additional costs to be met, or negative numbers which represent forecast cost reductions or additional income. The variances are shown in the year in which they are expected to be first seen and are then assumed to recur on an ongoing basis in each of the following years. One-off changes will be seen as an entry in one year and will then be reversed out in a following year. For example, there is currently a £3.7m pressure in 2025/26 in respect of one-off savings that were approved for 2024/25.

15. **Figure 2:** February 2025 Council approved MTFP position

	Revised Budget 2024/25 £m	Jan 2025 MTFP Position (updated from February 2024)			
Service Pressures (net of any specific grant changes)		25/26 £m	26/27 £m	27/28 £m	Total £m
Wellbeing Directorate	125.5	14.4	6.0	6.2	26.6
Children's Directorate	92.3	6.5	5.3	5.3	17.0
Operations Directorate	31.7	7.1	(0.1)	2.3	9.3
- Operations Directorate: Waste & Extended Producer Responsibility	29.5	(8.7)	1.9	0.8	(6.0)
Resources Directorate	41.4	2.4	0.2	0.0	2.6
Service Pressures (net of any specific grant changes)	320.4	21.7	13.3	14.5	49.5
Savings, Efficiencies, Fees & Charges		2m	2m	2m	2m
Wellbeing Directorate		(2.8)	(0.9)	(0.8)	(4.5)
Children's Directorate		0.0	0.0	0.0	0.0
Operations Directorate		(2.7)	(3.3)	(2.0)	(8.0)
Resources Directorate		(0.7)	(0.1)	(0.1)	(0.9)
Transformation		(1.7)	(3.5)	(5.2)	(10.4)
Reversal of one off savings in 2024/25		3.7	0.0	0.0	3.7
		(4.1)	(7.9)	(8.1)	(20.1)
Corporate Items - Cost Pressures	21.7	4.8	7.1	6.2	18.2
Funding - Changes	(338.7)	(23.0)	(10.4)	(17.6)	(50.9)
Annual – Net Funding Gap	3.4	(0.6)	2.1	(4.9)	(3.4)
Application of one-off business rates resources to MTFP	(3.4)	0.6	2.8	0.0	3.4
Annual – Net Funding Gap	0.0	0.0	4.9	(4.9)	0.0
Cumulative MTFP – Net Funding Gap		0.0	4.9	0.0	

Please note: The MTFP as presented does not provide for two specific known unknowns namely any potential impact of the governments funding reforms and future waste strategy.

16. The position as set out above has now been updated for several potential adjustments to previously identified cost pressures as well as the inclusion of a starting position 2028/29. These matters, as underpinned, by several key assumptions as set out below in Figure 3, are being kept under continual review and constantly refined based on the latest trend analysis, economic forecasts, government announcements, and professional judgements.

17. Figure 3: Medium Term Financial Plan - Key assumptions

	2026/27	2027/28	2028/29
Council Tax (Includes 2% Social Care Precept)	4.99%	4.99%	4.99%
Pay Award	2.0%	2.0%	2.0%
Minimum Increase in Fees & Charges	2%	2%	2%
National Living Wage (NLW) % Increase in the National Living Wage	2%	2%	2%
Bank of England - Base Rate	Dec-25 4.00%	Dec-26 3.50%	Dec-27 3.50%
Current BoE Base Rate: March 2025 4.5%			

Please note:

a) The increase in fees and charges should be regarded as a minimum increase to those not set by statute. The principle of full cost recovery may mean increases above these levels for example based on the specific cost profile of the service.

18. Figure 4: Updated and rolled MTFP

	Original Budget 2025/26 £m	April 2025 MTFP Position			
Service Pressures (net of any specific grant changes)		26/27 £m	27/28 £m	28/29 £m	Total £m
Wellbeing Directorate	137.9	6.0	6.2	6.5	18.7
Children's Directorate	99.4	5.3	5.3	5.3	15.8
Operations Directorate	36.1	(0.1)	2.3	2.5	4.7
- Operations Directorate: Waste & Extended Producer Responsibility	22.0	1.9	0.8	6.0	8.6
Resources Directorate	42.5	0.2	0.0	1.6	1.8
Service Pressures (net of any specific grant changes)	337.9	13.3	14.5	21.8	49.6
Savings, Efficiencies, Fees & Charges					
Wellbeing Directorate		(0.9)	(0.8)	(0.8)	(2.6)
Children's Directorate		0.0	0.0	0.0	0.0
Operations Directorate		(3.3)	(2.0)	(1.3)	(6.6)
Resources Directorate		(0.1)	(0.1)	(0.1)	(0.3)
Transformation		(3.5)	(5.2)	0.0	(8.8)
		(7.9)	(8.1)	(2.3)	(18.2)
Corporate Items - Cost Pressures	26.5	10.0	6.1	6.8	22.9
Funding - Changes	(361.6)	(10.4)	(17.6)	(20.1)	(48.1)
Annual – Net Funding Gap	2.8	5.0	(5.1)	6.3	6.2
Application of one-off business rates resources to MTFP	(2.8)	2.8	0.0	0.0	2.8
Annual – Net Funding Gap	0.0	7.7	(5.1)	6.3	8.9
Cumulative MTFP – Net Funding Gap		7.7	2.7	8.9	

Please note: The MTFP as presented does not provide for two specific known unknowns namely any potential impact of the governments funding reforms and future waste strategy.

19. The key changes since February relate to a slightly higher interest rate assumption and an assumption that further resources will need to be invested in the authority's pay base due to the ongoing negotiations associated with pay and reward and pay inflation in 2025/26.

Scenario Planning: Potential Variations

20. In support of the financial planning approach to enable delivery of a balanced budget for 2026/27 the council has considered the level of uncertainty and therefore risk that will apply to the current assumptions. In line with good practice these assumptions have been tested via a process of sensitivity analysis and several different models developed that highlight their impact. At the extremes they indicate there could be an improvement in the position or alternatively a deterioration which would lead to significant widening of the funding gap for 2026/27. These models consider the impact of various changes such as.

- Lower threshold increases in council tax levels.
- Lower or higher levels of change to the council's tax base.
- Lower or higher levels of base government grant funding including the impact of the government funding reforms.
- Lower or higher annual pay awards.
- Lower or higher borrowing costs.
- Alternative approaches that could be taken by government to address the accumulated DSG deficit.
- Changes to service demands including those impacted by the national living wage.

21. It should be highlighted that no tolerance has been made as part of this modelling in respect of the 2025/26 budgeted savings or those included in the MTFP for 2026/27 and 2027/28 on the basis that services are expected to ensure their delivery.

22. Figure 5: Sensitivity Analysis 2026/27 Budget Models

	Original Budget 2025/26 £m	Base Case 26/27 £m	Better Case 2026/27 £m	Middle Case 2026/27 £m	Worse Case 2026/27 £m
Service Pressures (net of any specific grant changes)	337.9	13.3	13.1	17.5	21.2
Savings, Efficiencies, Fees & Charges		(7.9)	(7.9)	(7.9)	(7.9)
Corporate Items - Cost Pressures	26.5	10.0	2.2	14.0	24.9
Funding - Changes	(361.6)	(10.4)	(18.3)	(7.4)	3.2
Annual – Net Funding Gap	2.8	5.0	(11.0)	16.2	41.4
Application of one-off business rates resources to MTFP	(2.8)	2.8	2.8	2.8	2.8
Annual – Net Funding Gap	0.0	7.7	(8.2)	19.0	44.2
Cumulative MTFP – Net Funding Gap		7.7	(8.2)	19.0	44.2

23. To ensure the council has considered and planned for all eventualities the intent is for services to produce savings plans based on cash limited budgets for 2026/27. These limits can be broken down into the net £337.9m cost of service total in the current 2025/26 financial year less the £7.9m in savings services have already committed to deliver in 2026/27 as approved by the savings schedule supporting the approved 2025/26 Budget and MTFP.
24. Therefore, services have been asked to develop savings proposals of circa £13.3m in support of the financial planning process.
25. Working with their Portfolio Holders, Corporate Directors, Service Directors, and Budget Holders will have until initially September 2025 to prepare these potential additional proposals for balancing the 2026/27 budget should they be required. As such these proposals will be considered at Bi-weekly Cabinet/Corporate Management Board meetings for further consideration as to whether they should be taken forward.

Financial Strategy to support maintaining a balance budget for 2025/26.

26. A financial strategy designed to support the delivery of a legally balanced budget for 2026/27 is attached in **Appendix C**. This focuses on a prudent approach to the council's financial management by considering the actions that now need to be developed and implemented. The approach continues to be one focused on conventional local government financial management processes and revenue sources. Developed by Cabinet working with Senior Officers, the strategy is focused on the following summarised workstreams which are detailed in the relevant appendix.

a) Delivering the February 2025 approved MTFP

Emphasis on the £7.9m of transformation and service specific savings proposals already approved for 2026/27.

b) Special Educational Needs & Disability (SEND) & Dedicated Schools Grant

Encourage government to honour commitment to return SEND to financial sustainability and set out how any such expenditure is to be funded moving forward.

c) Financial Outturn 2024/25.

Has the Council been able to deliver within the parameters of the February 2024 Council approved budget for 2024/25. Is there headroom to consider a voluntary repayment of debt contribution.

d) Savings plans based on cash limited budget targets for 2026/27

Working with Portfolio Holders services have been requested to develop saving plans based on a cash limited budget for 2026/27 which also recognises savings already committed to. The following activities will be considered in support of this approach.

- i) Invest to save proposals*
- ii) Use of AI technology*
- iii) Level of fees and charges*
- iv) Service harmonisation*

- v) *Service rationalisations*
- vi) *Market analysis*
- vii) *Voluntary redundancy programme*

e) Deliver a pipeline of capital receipts from asset disposals

Continue with the development of an ongoing programme of sales from assets no longer needed for service or strategic reasons.

f) Generation of additional resources

Develop and consider any proposals which would be able to increase the permanent or temporary resource base of the council.

g) Minimise capital programme requirements

Limit new capital requirements/bids by only considering fully externally funded schemes or those where there is a legal requirement. Additionally, consideration will be given to robust self-financing business cases that use the council's ability to borrow to invest in capital infrastructure which in turn drives down operational costs or avoids demand pressures.

h) Government policy reforms

Continue to monitor the impact of various government proposals which will have a direct impact on either the cost base or income sources available to the council.

i) Review of the council's balance sheet

To include a fundamental review of Earmarked Reserves and to benchmark items such as bad debts provisions to compare with the levels and policies of other local authorities.

j) Comparisons with other local authorities

Reflecting on best practice and the responses of other local authorities to the overall financial challenge and specifically any learning that BCP Council might want to consider implementing.

27. In summary, the financial strategy continues to be designed to improve the overall financial resilience of the council, to enhance financial stability, and to ensure that the Council can set a legally balanced budget for 2026/27.

Options Appraisal

28. Ultimately the budget process results in a consideration of alternative savings, efficiency, income generation and service rationalisation proposals. This may include consideration of alternative council tax strategies.

Summary of financial implications

29. Any financial implications of the report's recommendations are considered, alongside alternative options, elsewhere within this report.

Summary of legal implications

30. The council has a fiduciary duty to its taxpayers to be prudent in the administration of the funds on their behalf and an equal duty to consider the interests of the community which benefit from the services it provides.

31. It is the responsibility of councillors to ensure the council sets a balanced budget for the forthcoming year. In setting, such a budget councillors and officers of the council have a legal requirement to ensure it is balanced in a manner which reflects the needs of both current and future taxpayers in discharging these responsibilities. In essence, this is a direct reference to ensure that Council sets a financially sustainable budget which is mindful of the long-term consequences of any short-term decisions.
32. As a billing authority, failure to set a legal budget by 11 March each year may lead to intervention from the Secretary of State under section 15 of the Local Government Act 1999. It should however be noted that the deadline is, in reality, the 1 March each year to allow sufficient time for the council tax direct debit process to be adhered to.

Summary of human resources implications

33. There are no direct human resources implications associated with this report. However, the 2026/27 budget is likely to have a direct impact on the level of services delivered by the council, the mechanism by which those services are delivered and the associated staffing establishment.

Summary of sustainability impact

34. The 2025/26 approved budget protected the staffing resources associated with climate change and ecological emergency activity. In addition, as at the 31 March 2024 £1.239m was available in an earmarked reserve to support project activity.

Summary of public health implications

35. The Department of Health and Social Care have announced the council's public health grant allocations for 2025/26 is £23.261m which was an increase of 5.33% from the 2024/25 allocation. It has been agreed that £10.988m will be contributed towards shared contracted services with Dorset Council as part of the phased transition away from shared public health service.
36. In addition to the basic allocation, we have also received the following additional allocations.
- £3.023m drug & alcohol treatment and recovery improvement grant (DATRIG)
 - £429.9k for the local stop smoking and support grant (LSSSASG)

Summary of equality implications

37. Officers are expected to deliver the services they are responsible for with due regard to the equality's implications. A full equalities impact assessment will be undertaken as part of the final February 2026 report to members as part of the annual budget process.

Summary of risk assessment

38. The risks inherent in the financial position of the council include the following issues set out in detail as part of the 11 February 2025 report to full council in relating to the 2025/26 budget and medium-term financial plan.
- Accumulating DSG Deficit.
 - Cashflow Crisis

- New Pay and Grading Structure.
- Council Tax – Taxbase
- Financial Outturn 2024/25
- Legal Claims.
- Uncertainty.
- Pay Award
- Local Government Funding Reforms.
- Extended Producer Responsibility
- Loss or disruption to IT systems and Networks from a cyber-attack.
- Council Owned Companies and Joint Ventures.
- Intervention.
- Children's Services.
- Wellbeing Services.
- Housing: Temporary Accommodation including Bed and Breakfast
- Delivering savings, efficiencies, and additional income generation.
- Realisation of capital receipts to fund the council's transformation programme.
- Carters Quay.

39. These risks will continue to be monitored and where possible and appropriate mitigation strategies considered. At the time of writing this report a particular risk which will continue to be considered is in regard to the uncertainty caused by global macroeconomic factors.

Background papers

40. February 2025: Budget 2025/26 and Medium-Term Financial Plan report

<https://democracy.bcpccouncil.gov.uk/ieListDocuments.aspx?CId=284&MId=6294&Ver=4>

Appendices

Appendix A Local Government Funding Reform: Consultation Response

Appendix B Budget Planning process and timetable.

Appendix C Financial strategy supporting the delivery of the 2026/27 budget.

Local Government Finance
Ministry of Housing, Communities and Local Government
Fry Building
2 Marsham Street
London
SW1P 4DF

Response to the consultation on Local Government Funding Reform

Name: Adam Richens

Type of Organisation: Local Authority

Name of Organisation: Bournemouth, Christchurch, and Poole

Position: Director of Finance

Address: Civic Centre, Bourne Avenue, Bournemouth, BH2 6DY

Email address: adam.richens@bcpcouncil.gov.uk

Telephone number: 01202 123027

Question 1: Do you agree with the government's objective to allocate grant and retained business rates income in a way which accounts for differences between local authorities in demand for services, the cost of delivering them and ability to raise Council Tax locally?

Response

Disagree.

This should not be based on the ability to raise Council tax locally which is an entirely false and misleading measure based on historical decisions taken over the last 30+ years. Each local authority has the ability to raise the same council tax locally. It has been the historic vagaries of the local government funding formulae and local decision making that has created the current disparities.

Question 2: In addition to the areas included in this consultation, are there elements of the local government finance system that are not fit for purpose and require improvement and reform? If so, please provide information on what reforms are required and why.

Response

Business Rates as a funding source is an incredibly complex system which needs to be simplified in its operation with any reset.

We are not convinced any Area Cost Adjustments are still appropriate in which staff work from home and then work for the local authority with the best remuneration package which tends to be the London Authorities.

Question 3: Do you agree that the suggested principles should inform our approach to updating local authority funding allocations?

Response

Agree

The transitional arrangements are particularly important to allow authorities time to make thoughtful and considered responses to any changes.

In regard to transparency to the public it is important they understand what councils actually deliver, particularly the significant cost of social care. How councils are funded is fairly well understood.

Question 4: Do you agree with our proposal to use the best available evidence and most up-to-date data in the assessment of need, including using the most recent census data?

Response

Agree particularly focus on adult and children social care being of the utmost importance.

Question 5: Do you agree with our proposal to simplify the assessment by reducing the number of Relative Needs Formulae? If you disagree, please explain why and which service areas you are concerned about.

Response

Agree particularly focus on adult and children social care being of the utmost importance.

Question 6: For the children, young people and family services formula, do you agree that the variables set out are the right ones to consider in an assessment of relative need? If you recommend the addition or removal of variables, please provide supporting evidence and recommend a suitable dataset.

Response

These indicators intuitively would be the right ones but is there a clear link with the data for numbers of looked after children and children in need with the associated costs? Local childcare markets can significantly impact on placements costs unrelated to general local labour markets or levels of local deprivation. Unrelated to council funding, government action is needed to tackle excess profits being made in children's social care markets.

Question 7: Do you agree that the government should consider updating the data in the fire and rescue services Relative Needs Formula?

Response

No view

This is a matter for Fire and Rescue authorities.

Question 8: Do you agree we should assess differences in cost using an Area Cost Adjustment based on the structure of 2024 ACA? If not, please provide evidence for alternative approaches.

Response

Disagree

The relevance of the Area Cost Adjustment has significantly diminished with staff working from home. BCP Council has certainly lost a significant number of staff who now work for higher paying local London authorities but at home from Bournemouth, Christchurch, Poole area. All the Area Cost Adjustment does it perpetuates the ability of London authorities to attract staff.

Question 9: Do you agree that (other than locally retained business rates) we should only adjust for Council Tax when assessing local resources? If you do not agree, please include details of what other sources of income you think should be included (if any), and how the government should adjust for them.

Response

Disagree

Do not believe you should be adjusting for Council Tax as government has the ability to reset the system and allow all local authorities to apply a consistent rate. Account should not be taken of other forms of income such as Sales, Fees and Charges as these generally should be set to cover costs, costs which are not recognised in the various assessments of need.

Question 10: Do you agree that we should measure Council Tax income by making uniform assumptions on the Level of Council Tax charged by local authorities and factors which determine their ability to raise Council Tax?

Response

Agree

Question 11: To what extent should we adjust for Council Tax when determining local authority allocations (i.e. what assumption should we make on Council Tax Level)?

Response

No view

Question 12: Do you agree Transitional Arrangements should account for a Business Rates Reset? If not, please explain why.

Response

Agree. The system was always designed for a reset. Transitional arrangements must avoid cliff edges for councils. We have concerns around a percentage of business rates income going toward strategic authorities without a clear understanding of what costs will also be removed at the same time.

The council would have concerns around any system which leads to local resources, be that Council Tax or Business Rates, which are redistributed nationally.

Question 13: Do you agree or disagree we should enable and encourage local authorities to support housebuilding in their areas through the Local Government Finance Settlement? Please provide any explanation or supporting evidence for your view.

Response

Agree

However, this needs to be supported by significantly higher capital grant rates than are currently available and investment in other infrastructure key to developments such as the electrical power network, water and sewage works, and NHS Service.

Question 14: What measures should we use to support local authorities to move to their updated funding allocations?

Response

Blend in updated allocations over several years

Question 15: Do you agree we should keep funding allocations up-to-date dynamically by using the most up-to-date data possible? If so, how?

Response

Agree

Question 16: What are the most excessively burdensome activities or requirements for councils, which if changed, could significantly free up local government capacity?

Response

No strong view.

Question 17: Do you agree with our proposals to reduce the number of grants and New Burdens payments issued to local government?

Response

Agree too many grants but a clear link must still be maintained where new demands are placed on local authorities to ensure they are adequately funded. An example would be the requirements of the Children's and Families Act 2014 which created the need to establish Education, Health and Care Plans (EHCPs) and the ballooning annual shortfalls in the Dedicated Schools Grant (DSG) high needs block government funding and the corresponding DSG deficits.

Question 18: Do you agree or disagree that the government should provide local authorities with greater control over Sales, Fees and Charges? Please provide supporting evidence, considering specific fees where greater control would be of most benefit, and expected impacts on charge-payers.

Response

Agree

All fees should be set to at least cover the cost of providing those services, including the full on-costs, not just headline costs. Most fees set by government do not cover the full cost of providing those services. Councils should also be given the power to set penalties such as parking fines at rates which will act as a deterrent based on local parking fees.

Question 19: Do you have any views on the potential impacts of the proposals in this consultation on persons who share a protected characteristic?

No

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2026/27 Budget Timetable and Budget Process

1. The budget for 2026/27 and the MTFP should be seen in the context of a rolling, evolving process structured to enable the ongoing proactive management and prioritisation of the council's resources.
2. As a sector local authorities have been grappling with sustained financial pressures since 2010. Recently councils have had to become more efficient in navigating the uncertainty and volatility caused by global macro-economic factors, the legacy and long-term consequences of the Covid-19 pandemic, alongside those caused by the recent cost-of-living crisis, and changes in public policy.
3. The key dates in the 2026/27 budget setting process can be set out as follows.

May 2025	Cabinet - MTFP update report (including financial strategy).
July 2025	Cabinet - Quarter 4 / Financial Outturn 2024/25.
September 2025	Cabinet - Quarter 1 - 2025/26 budget monitoring.
October 2025	Cabinet - MTFP update report
October 2025	Budget Consultation Exercise Opens
November 2025	Budget Consultation Exercise Closes
November 2025	All Members – Draft developing 2026/27 Budget Presentation
December 2025	Cabinet - Quarter 2 – 2025/26 budget monitoring
December 2025	Cabinet - MTFP update report
January 2026	Cabinet – Council Tax 2026/27 taxbase report
January 2026	Audit & Governance Committee (Treasury Management Strategy)
January 2026	All Member – Final proposed 2026/27 Budget Presentation
January 2026	Presentation to representatives from Commerce and Industry
February 2026	Cabinet – Quarter 3 – 2025/26 budget monitoring
February 2026	Cabinet – 2026/27 proposed budget and MTFP
February 2026	Council – 2026/27 proposed budget and MTFP

BCP Council - Budget Process 2026/27

		Month	Decisions	Cabinet	Public Engagement	Budget Holders	Finance	Strategic Planning Cycle
100	Scrutiny	Feb	Council Budget Meeting					Budget 25/26 approved + MTFP to 31 March 2028
		March						
		April						
		May		Based on a proposed scenario Portfolio Holders engagement with budget holders to develop proposals for balancing the 2026/27 budget. Conversations part of the Bi-weekly informal Corporate Management Board/Cabinet strategic planning session meetings		Services prepare savings, efficiency, additional income and service rationalisation proposals to enable the 2026/27 budget to be balanced	Calculate initial savings targets	
		June						
		June					Draft progress update report	
	Scrutiny	July	Cabinet MTFP Update Report					
		Aug					Fundamental refresh of the MTFP baseline	
		Sept					Refine savings targets	
	Scrutiny	Oct	Cabinet MTFP Update Report		Budget Public Engagement Exercise - 6 weeks	Services present proposals to Bi-weekly CMB/Cabinet strategic planning meetings	Draft Cabinet report on savings proposals	
	Budget Workshop	Nov					Draft progress update report	
	Scrutiny	Dec	Cabinet MTFP Update Report	Cabinet members finalise 2026/27 budget proposals		Service refine budget proposals in light of outcomes of public engagement exercise	Update MTFP and draft Cabinet report on final budget proposals	Finalisation of budget proposal for 2026/27 and MTFP for Cabinet and Council consideration
	Budget Workshop	Jan						
	Scrutiny	Feb	Council Budget Meeting		Statutory Consultation Commerce & Industry			Budget 26/27 approved + MTFP to 31 March 2029

Key Financial Reports & Events - 25/26 Budget Monitoring & 26/27 Budget Timeline

Date	Event	Report Title / Action	Detail
May 2025	Budget Proposals	Corporate Directors, Service Directors and Budget Holders working with Portfolio Holders	Start of period for preparation of proposals for delivering a balanced 2026/27 budget.
May 2025	Cabinet	Medium Term Financial Plan (Update)	To include. <ul style="list-style-type: none"> • Update on MTFP. • Proposed financial strategy. • Budget process.
July 2025	Cabinet	Financial Outturn Report	Summary report covering the financial outturn for 2024/25.
August 2025	Budget Refresh	Corporate Directors & Service Directors	Deadline to produce a refresh of the MTFP baseline financial resource requirements for each service for the three-year period to the 31 March 2029
September 2025	Cabinet	Quarter One Budget Monitoring Report	First quarter (April to June) budget monitoring for 2025/26.
September 2025	Budget Proposals	Corporate Directors, Service Directors and Budget Holders working with Portfolio Holders	Close of initial period for preparation of proposals for delivering a balanced 2026/27 budget.
October 2025	Audit & Governance	2024/25 Statement of Accounts	Report presents the 2024/25 statement of accounts for BCP Council including the Annual Governance Statement.

Date	Event	Report Title / Action	Detail
October 2025	Cabinet	Medium Term Financial Plan (Update)	To include. <ul style="list-style-type: none"> fundamental refresh of the MTFP. progress towards delivering a balanced budget for 2026/27
October 2025	Budget Proposals	Budget Engagement Exercise	4 or 6-week consultation opens
November 2025	Budget Proposals	Budget Engagement Exercise	Consultation closes (assuming 4 week) 18 October if 6 weeks exercise.
November 2025	Budget Proposals	Budget Presentation	All Councillor Seminar
December 2025	Cabinet	Quarter Two Budget Monitoring Report	Second quarter (July to September) in-year budget monitoring for 2025/26
December 2024	Cabinet	Medium Term Financial Plan (Update)	Progress towards delivering a balanced budget for 2026/27
January 2026	Cabinet	Council Tax - Taxbase Report	2026/27 Council Tax Taxbase

Date	Event	Report Title / Action	Detail
January 2026	Audit & Governance	Treasury Management Strategy 2026/27	Seek approval for 2026/27 treasury management strategy
January 2026	Budget Proposals	Budget Presentation	All Councillor Seminar
January 2026	Budget Proposals	Presentation to representatives from Commerce & Industry	Statutory consultation on 2026/27 Budget & MTFP
February 2026	Cabinet	Quarter Three Budget Monitoring	Third quarter (October to December) budget monitoring for 2025/26.
February 2026	Cabinet	2026/27 Budget & MTFP Update	To include. <ul style="list-style-type: none"> • 2026/27 Provisional Local Government Finance Settlement. • 2026/27 Budget Proposal. • 2026/27 Council Tax Resolution.
February 2026	Cabinet	Housing Revenue Account (HRA) 2026/27 Budget Setting	Seeks approval for the Housing Revenue Account (HRA) which is the separate account that ring-fences the income and expenditure associated with BCP Council's housing stock. Includes rents, service charges and other charges to tenants.

Date	Event	Report Title / Action	Detail
February 2026	Cabinet	Dedicated Schools Grant (DSG) and Early Years Funding Formula 2026/27	Setting the 2026/27 funding formulae for early education and childcare for eligible 2-year-olds and all 3- and 4-years olds, mainstream schools for pupils in reception to year 11.
February 2026	Council	2026/27 Budget & MTFP Update Report	Formal approval of the following. <ul style="list-style-type: none"> • General fund 2026/27 budget and council tax. • Education and childcare funding formula. • Housing Revenue Account 2026/27 budget and tenant charges.
March 2026	n/a	n/a	Publish 2026/27 Budget Book
July 2026	Cabinet	Financial Outturn Report	Summary report covering the financial outturn for the financial year 2025/26.

Subject to determination

- Scrutiny arrangements associated with the 2026/27 budget process.
- Dates of the precept meetings for the Town, Parish and Neighbourhood Councils in Christchurch and the Chartered Trustees in both Bournemouth & Poole

2026/27 Budget - Financial Strategy

Supporting the 2026/27 Budget & Medium-Term Financial Plan (MTFP)

With a continuing focus on traditional local government financial management processes and revenue sources the Cabinet working with Senior Officers has developed the following financial strategy to support the delivery of a legally balanced 2026/27 Budget and Medium-Term Financial Plan.

a) Delivery of the February 2025 approved Medium Term Financial Plan

Action by Portfolio Holders, Corporate Directors, and all Budget Holders to deliver the assumptions as set out in the February 2025 report to Council. The emphasis will be on the delivery of the £7.9m of assumed, savings, efficiencies, additional fees and charges, or service adjustments programmed for 2026/27.

b) Special Educational Needs & Disability & Dedicated Schools Grant (DSG)

Continue to encourage the Department for Education (DfE) and the Department for Levelling Up, Housing and Communities (DLUHC) to honour their commitment to return the SEND system to financial sustainability during 2025. The council has budgeted to borrow to fund the £57.5m of excess of special educational needs and disability (SEND) expenditure over the government DSG grant in 2025/26. It can only do this on a temporary basis linked to the promise of government to establish a sustainable solution. Failure of government to provide a solution will present an existential threat to the financial viability of the council.

c) Financial Outturn 2024/25

Review of the 2024/25 Financial Outturn to consider the extent to which the council was able to deliver within the parameters of the February 2024 Council approved resources for the year. In addition, and as a matter of principle, it was also previously identified that should resources become available at financial year-end then consideration will be given, as recognised in the councils Treasury Management Strategy, to the voluntary repayment of debt bearing in mind the budget for the year adopted a different strategy to debt repayment from that previously applied.

The opportunity will also be taken to consider if there is any evidence to suggest that the base revenue budget needs to be rebased to reflect income and expenditure patterns in the period since the 2025/26 budget was set. Care will need to be taken to consider the impact of the spend control that operated during the whole of the last financial year.

d) Savings plans based on cash limited budget targets for 2026/27

Services have been asked to develop saving plan proposals for 2026/27 based on cash limited budgets. These can be broken down into the current 2025/26 budget less the £7.9m savings services have already committed to deliver in 2026/27. The following activities will be considered in support of this approach.

i. Invest to save proposals

Based on value for money principles and on robust business cases, proposals which demonstrate that a specified upfront invest of either revenue or capital or both, will deliver an ongoing revenue saving to the authority.

ii. Use of AI technology

It is recognised that AI technology could have an impact on a range of council services from business support and customer services to adult social care

and children's services. The cost of the technology including ongoing licensing costs needs to be reflected upon in any business case alongside staff productivity and the ability to actually realise savings.

iii. Level of fees and charges

Ensure all fees and charges are increased in line with the impact of inflation on the service including the impact of the pay award and the pay & reward workstream. In doing so services should continue to ensure application of the full cost recovery principle which requires that all fees and charges are set at a level to guarantee that all costs both revenue and capital, direct and indirect are fully recovered.

iv. Service harmonisation

The intent is to harmonise all services across the conurbation following the 2019 Local Government Reorganisation. Good progress has been made however all outstanding areas of harmonisation will be reviewed to eliminate any areas of difference. This action is underpinned by the assumption of the harmonisation of systems used to underpin the delivery of services

v. Service rationalisations

Consideration of services that the local authority is not required to provide and any expenditure on services that it currently provides above the statutory minimum.

vi. Market analysis

Consider the extent to which services, from a value for money perspective, might be better delivered by the private sector. Besides efficiency, considerations might include the cost differentials between local authorities and private companies. The council may also find it more effective to procure services as and when needed via a contract arrangement rather than retaining capacity in-house.

vii. Voluntary redundancy programmes

Ongoing consideration will be given to the extent to which voluntary redundancy processes can be used to unlock the delivery of savings for 2026/27 onwards. Previously endorsed value for money criteria will be used to assess any such proposals.

e) Deliver a pipeline of capital receipts from asset disposals

Continue with the development of an ongoing programme of sales from assets no longer needed for service or strategic reasons. The use of these receipts to be considered in support of.

- Service specific transformation programmes funded via the Flexible Use of Capital Receipts.
- Debt repayment.
- Improvements to Civic Hubs.
- Capital investment in assets.

f) Minimise capital programme requirements

Limit new capital requirements/bids by only considering fully externally funded schemes or those where there is a legal requirement (such a critical condition schemes to manage health and safety or manage operations). In addition, consideration will be given to robust self-financing business cases that use the

council's ability to borrow to invest in capital infrastructure which in turn drives down operational costs or avoid demand pressures.

g) Generation of additional resources

Develop and consider any proposals which would be able to increase the permanent or temporary resource base of the council. This includes consideration of resurrecting a previous conversation with government around having the flexibility to increase council tax by the additional 2.43% that it could now be charging if it had increased its amounts in line with government policy across the two-year time horizon 2021/22 and 2022/23.

h) Government policy reforms

Continue to monitor the impact of various government proposals which will have a direct impact on either the cost base or income sources available to the council. An example being the Family First Partnership resources which overtime the government are expecting to significantly reduce the number of looked after children.

i) Review of the council's balance sheet

Ongoing review of the authority's balance sheet to include a fundamental review of Earmarked Reserves and to benchmark items such as bad debts provisions to compare with the levels and policies of other local authorities.

j) Comparisons with other local authorities

Reflecting on best practice and the responses of other local authorities to the overall financial challenge and specifically any learning that BCP Council might want to consider implementing.

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OVERVIEW AND SCRUTINY BOARD



Report subject	Work Plan
Meeting date	12 May 2025
Status	Public Report
Executive summary	The Overview and Scrutiny (O&S) Committee is asked to consider and identify work priorities for publication in a Work Plan.
Recommendations	It is RECOMMENDED that: the Overview and Scrutiny Board review, update and confirm the Work Plan.
Reason for recommendations	The Council's Constitution requires all Overview and Scrutiny Committees to set out proposed work in a Work Plan which will be published with each agenda.
Portfolio Holder(s):	N/A – Overview and Scrutiny is a non-executive function
Corporate Director	Graham Farrant, Chief Executive
Report Authors	Lindsay Marshall, Overview and Scrutiny Specialist
Wards	Council-wide
Classification	For Decision

Work Plan updates

1. This report provides the latest version of the Committee's Work Plan at Appendix A and guidance on how to populate and review the Work Plan in line with the Council's Constitution. For the purposes of this report, all references to Overview and Scrutiny Committees shall also apply to the Overview and Scrutiny Board unless otherwise stated.
2. Items added to the Work Plan since the last publication are highlighted as 'NEW'. Councillors are asked to consider and confirm the latest Work Plan.
3. In addition to the latest Work Plan, the Committee is asked to consider the following requests for scrutiny which have been received since the last meeting and are attached at Appendix B:
 - Culture of the Council – requested by Councillor M Howell
 - Parking Enforcement around School.

4. The most recent [Cabinet Forward Plan](#) can be viewed on the council's website. This link is included in each O&S Work Plan report for councillors to view and refer to when considering whether any items of pre-decision scrutiny will join the O&S Committee Work Plan.

Resources to support O&S Work

5. The Constitution requires that O&S committees take account of the resources available to support proposals for O&S work. Advice on maximising the resource available to O&S Committees is set out in the O&S Work Planning Guidance document referenced below.

Work programming guidance and tools

6. The [Overview and Scrutiny Committees Terms of Reference](#) document provides detail on the principles of scrutiny at BCP Council, the membership, functions and remit of each O&S committee and the variety of working methods available.
7. [The O&S Work Planning Guidance](#) document provides detail on all aspects of work planning including how to determine requests for scrutiny in line with the Council's constitution.
8. The [O&S Framework for scrutiny topic selection](#) was drawn up by O&S councillors in conjunction with the Centre for Governance and Scrutiny. The framework provides detail on the criteria for proactive, reactive and pre-decision scrutiny topics, and guidance on how these can be selected to contribute to value-added scrutiny outcomes.
9. The '[Request for consideration of an issue by Overview and Scrutiny](#)' form is an example form to be used by councillors and residents when making a new suggestion for a scrutiny topic. Word copies of the form are available from Democratic Services upon request by using the contact details on this agenda.

Options Appraisal

10. The O&S Committee is asked to review, update and confirm its Work Plan, taking account of the supporting documents provided and including the determination of any new requests for scrutiny. This will ensure member ownership of the Work Plan and that reports can be prepared in a timely way.
11. If updates to the Work Plan are not confirmed there may be an impact on timeliness of reports and other scrutiny activity.

Summary of financial implications

12. There are no financial implications arising from this report.

Summary of legal implications

13. There are no legal implications arising from this report. The Council's Constitution requires that all O&S bodies set out proposed work in a Work Plan which will be published with each agenda. The recommendation proposed in this report will fulfil this requirement.

Summary of human resources implications

14. There are no human resources implications arising from this report.

Summary of sustainability impact

15. There are no sustainability resources implications arising from this report.

Summary of public health implications

16. There are no public health implications arising from this report.

Summary of equality implications

17. There are no equality implications arising from this report. Any councillor and any member of the public may make suggestions for overview and scrutiny work. Further detail on this process is included within O&S Procedure Rules at Part 4 of the Council's Constitution.

Summary of risk assessment

18. There is a risk of challenge to the Council if the Constitutional requirement to establish and publish a Work Plan is not met.

Background papers

- [Overview and Scrutiny Committees Terms of Reference](#)
- [O&S Work Planning Guidance document](#)
- [O&S Framework for scrutiny topic selection](#)
- [‘Request for consideration of an issue by Overview and Scrutiny’](#)

Further detail on these background papers is contained within the body of this report.

Appendices

Appendix A - Current O&S Work Plan

Appendix B – Scrutiny Request from Councillor x

Appendix C – Scrutiny request from Councillor x

etc

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BCP Council Overview and Scrutiny Board – Work Plan. Updated 29.04.2025

Guidance notes:

- 2/3 items per committee meeting is the recommended maximum for effective scrutiny.
- The O&S Board will approach work through a lens of **RESIDENT IMPACT AND EXPERIENCE**
- Items requiring further scoping are identified and should be scoped using the Key Lines of Enquiry tool.

	Subject and background	How will the scrutiny be done?	Lead Officer/Portfolio Holder	Report Information
Meeting Date: 12 May 2025				
1.	Arts and Culture Funding Item requested through work planning workshops – Board request to consider the allocation of funding for different Arts and Culture based activities.	Committee Report	PH - Connected Communities and PH - Customer, Communication and Culture Director of Commercial Operations	Item from Pro-Active Scrutiny List (including funding for BSO and Lighthouse) (Moved from 24 March)
2.	NEW Blue Badge Service Update The O&S Board have previously considered the performance of this service and requested an update to come back to the Board	Committee Report	PH - Customer Communication and Culture Director of Customer and Property	Update item previously requested by the Board in November
3.	NEW Medium Term Financial Plan (MTFP) Update The Board requested to review MTFP reports to Cabinet	Pre-decision scrutiny of a Cabinet report	PH – Finance Chief Finance Officer	This item was brought forward for Cabinet and therefor added to this Board

Key: Pre-Decision Scrutiny Pro-active Scrutiny

	Subject and background	How will the scrutiny be done?	Lead Officer/Portfolio Holder	Report Information
4.	NEW BCP Council Complaints Policy Pre-decision scrutiny of a Cabinet decision to agree the updated policy, that reflects the latest guidance from the Local Government Ombudsman Complaint Handling Code	Pre-decision scrutiny of a Cabinet report	PH - Customer Communication and Culture Director of Customer and Property	Item added to the Cabinet Forward Plan since the last Board meeting
Meeting Date: 9 June 2025				
1.	Management of Leisure Centres Item requested to receive an update on progress made in shaping the future management of leisure centres and contribute to future development.	Committee Report / Presentation	PH - Destination, Leisure and Commercial Operations Director of Commercial Operations	Item added to the Work Plan – 24 February 2025 – Note it has been suggested that this be in the form of a presentation to the Committee
2.	Bournemouth Air Festival This report provides an update on the progress to seek external support to deliver and fund an Air Festival from 2026 onwards and recommends a way forward in relation to the future delivery of the Air Festival	Pre-Decision Scrutiny of a Cabinet Report	PH - Destination, Leisure and Commercial Operations Director of Commercial Operations	Item identified from Cabinet FP – moved from May 2025
3.	NEW BCP Libraries Strategy To consider a Cabinet report which presents the key elements of the new draft Library Strategy ahead of a second stage consultation process.	Pre-Decision Scrutiny of a Cabinet Report	PH – PH - Customer Communication and Culture Director of Customer and Property	Item identified from Cabinet FP

Key: Pre-Decision Scrutiny Pro-active Scrutiny

	Subject and background	How will the scrutiny be done?	Lead Officer/Portfolio Holder	Report Information
4.	NEW Winter Gardens To consider a Cabinet report with an assessment of the options for funding the pre-construction work on a new Winter Gardens development project through the Bournemouth Development Company joint venture	Pre-Decision Scrutiny of a Cabinet Report	PH - Leader of the Council Director Investment and Development	Item identified from the Cabinet FP
5.	Working Group Findings (TBC) To consider the findings and recommendations of the Public Consultations Framework Development working group (subject to completion of the group's work).	Report from the working group	PH - Customer Communication and Culture Director of Marketing and Communications	
Meeting Date: 7 July 2025				
1.	BCP Commercial Operations Item requested to provide an overview of the operating practices for the Commercial Operations service, including its contracts and partnerships.	Committee Report	PH - Destination, Leisure and Commercial Operations Director Commercial Operations	Item added to the Work Plan – 24 February 2025-date moved from 12 May 2025
2.	Investment and Development Directorate - Regeneration Programme This report provides a bi-annual update on the progress of the Council's regeneration programme.	Pre-Decision Scrutiny of a Cabinet Report	PH - Leader of the Council Director Investment and Development	

Key: Pre-Decision Scrutiny Pro-active Scrutiny

	Subject and background	How will the scrutiny be done?	Lead Officer/Portfolio Holder	Report Information
Meeting Date: 26 August 2025				
	Meeting items to be determined following work planning			
Meeting Date: 22 September 2025				
1.	NEW - Community Governance Review Final Recommendations – Note that there may be a need for the date of this meeting to move to 30 September to accommodate consideration of this item	Pre-Decision Scrutiny of a Cabinet Report	PH - Leader of the Council Monitoring Officer	New item added to work plan 24 February 2025
Meeting Date: 20 October 2025				
	Meeting items to be determined following work planning			
Items with Dates to be allocated				
	Accounting for Social Value in decision making	Committee Report	TBC	Item requires further scoping - KLOE document
	Working more collectively across BCP geographical areas / Locality Governance – Substantive item	Committee Report	TBC	This requires further scoping – KLOE document
	Performance of the Council Data, and performance of directorates and staff	Informal investigation report by O&S Board – potential rapporteur work	TBC	This requires further scoping – KLOE document

Key: Pre-Decision Scrutiny Pro-active Scrutiny

	Subject and background	How will the scrutiny be done?	Lead Officer/Portfolio Holder	Report Information
	Customer Relationship Management To consider the implementation process for the new CRM system and the impact that it has had and any issues for improvement	Committee Report/Working Group	PH – PH - Customer Communication and Culture Director of Customer and Property	Requested and agreed at the Board meeting in January 2025
	Pay and Reward The O&S Board has previously considered several reports concerning Pay and Reward and has requested that should further Cabinet decisions be required on this issue that it be brought back to the Board.	Pre-decision Scrutiny/ Cabinet report	PH – Leader of the Council Director of People and Culture	This is included in the work plan in anticipation of this being brought back to Cabinet for future decision.
Working Groups				
	Public Consultations Framework Development – This group is due to meet at the end of March / beginning of April 2025 and should report back to the Board in June/July 2025 with its recommendations.		Director of Marketing, Communications and Policy PH – Customer, Communications and Culture	The Board established this working group at its meeting on 18 November. Further scoping is required
	POTENTIAL WORKING GROUP – BID related issues	TBC	TBC	TBC
	POTENTIAL WORKING GROUP – Customer Relationship Management	TBC	TBC	TBC

Key: Pre-Decision Scrutiny Pro-active Scrutiny

	Subject and background	How will the scrutiny be done?	Lead Officer/Portfolio Holder	Report Information
Item suggestions for Briefing Sessions				
	Leisure Services Presentation – note this may be done through a Board meeting	Presentation	PH - Destination, Leisure and Commercial Operations / PH – Customer, Communications and Culture	No report - information briefing session



Dates for O&S Board Briefing Sessions for 2025/26 (topics to be agreed):

Monday 2 June

Monday 8 September

Monday 24 November

Monday 9 March

Key:  Pre-Decision Scrutiny  Pro-active Scrutiny

Request for consideration of an issue by Overview and Scrutiny

Guidance on the use of this form:

This form is for use by councillors and members of the public who want to request that an item joins an Overview and Scrutiny agenda. Any issue may be suggested, provided it affects the BCP area or the inhabitants of the area in some way. Scrutiny of the issue can only be requested once in a 12 month period.

The form may also be used for the reporting of a referral item to Overview and Scrutiny by another body of the council, such as Cabinet or Council.

The Overview and Scrutiny Committee receiving the request will make an assessment of the issue using the detail provided in this form and determine whether to add it to its forward plan of work.

They may take a variety of steps to progress the issue, including requesting more information on it from officers of the council, asking for a member of the overview and scrutiny committee to 'champion' the issue and report back, or establishing a small working group of councillors to look at the issue in more detail.

If the Committee does not agree to progress the issue it will set out reasons for this and they will be provided to the person submitting this form.

More information can be found at Part 4.C of the BCP Council Constitution
<https://democracy.bcpCouncil.gov.uk/ieListMeetings.aspx?CommitteeID=151&Info=1&bcr=1>

Please complete all sections as fully as possible

1. Issue requested for scrutiny

Culture of the Council – requested by Councillor Mark Howell.

The appointment of a new CEO presents an opportunity to strengthen the culture of councillor/ officer working relationships and to propose reforms designed to deliver improved performance and motivation.

2. Desired outcome resulting from Overview and Scrutiny engagement, including the value to be added to the Council, the BCP area or its inhabitants.

Recommendations to the new CEO such as:

1. The need for a teamworking dynamic which encourages collaborative project development by officers and members, including respect for the skills and experience of councillors and consultation with ward councillors at an early stage in decision making.
2. The benefits that may accrue in terms of greater accountability if minutes of officer and officer/member meetings are required to be produced.
3. The need for recognition of the importance of promoting the distinctiveness of each of the three towns and respect for these geographic and civic entities when designing services (subject to reasonable cost considerations), within the overarching ethos and promotion of BCP Council.

3. Background to the issue

Perceived difficulties experienced by some councillors in being consulted about ward issues, accessing information and support, and scrutinising decision-making.

4. Proposed method of scrutiny - (for example, a committee report or a working group investigation)

Working group

5. Key dates and anticipated timescale for the scrutiny work

ASAP given that recruitment of the new CEO is under way.

6. Notes/ additional guidance

None

Document last reviewed – January 2022

Contact – democratic.services@bcpcouncil.gov.uk

Request for consideration of an issue by Overview and Scrutiny

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If the Committee does not agree to progress the issue it will set out reasons for this and they will be provided to the person submitting this form.

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Please complete all sections as fully as possible

1. Issue requested for scrutiny

Parking enforcement around schools

2. Desired outcome resulting from Overview and Scrutiny engagement, including the value to be added to the Council, the BCP area or its inhabitants.

Better methodology of enforcement to improve compliance with parking restrictions

3. Background to the issue

Parking compliance around most schools in everywhere is bad, outside of visits by the parking team which I believe are every 30-60 days illegal parking is parking is endemic.

Speaking with colleagues across the conurbation, it's clear that parking outside schools is an area of concern for most Cllrs due to often dangerous and poor parking from some drivers

My observations have been during pickup time both with and without the parking team present. Illegal parking typically starts around 10-15mins before the gates open to let parents into the school and lasts for around 25mins.

When the parking team are present things do improve with less illegal parking being present, but some do still exploit the 5-minute wait time before a ticket can be issued where plain single or double yellows are present.

The current method of enforcement seems to be for several CEOs to attend a site and be visible/issue tickets during the busy time. This is a great deterrent for that time period but offers little deterrent when they are not present.

This behaviour risks the safety of parents and children attending the school and affects emergency access.

4. Proposed method of scrutiny - (for example, a committee report or a working group investigation)

I ask that scrutiny committee considers key points,

5. Key dates and anticipated timescale for the scrutiny work

None

6. Notes/ additional guidance

None

Document last reviewed – January 2022

Contact – democratic.services@bcpcouncil.gov.uk